

# NWAIS

## Northwest Association *of* Independent Schools

*The Overlake School*  
*October 11-14, 2015*

NWAIS Accreditation Visiting Team Report

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## School Profile

Name of School - The Overlake School

City - Redmond State - WA

Grade Range - 5-12th Division Structure (if applicable) - Middle School - 5-8th | Upper School - 9-12th

Founding Date - 9/1/1967

Size of Board - 15 Current Board Chair - Chris Williams

Date of Appointment - 9/29/2014 Length of Term- 3 Years

Current Head - Matt Horvat Date of Appointment - 7/1/2012

Brief Description of Campus, Facilities, and Surrounding Community:

Founded in 1967, The Overlake School is nestled on 75 acres of land and has been called a rural oasis on the busy Eastside. Initially farm land, the campus complements the natural environment, encouraging personal growth for our students as they live and learn in this beautiful, peaceful setting.

Total Number of Employees - 104 (full-time) 15 (part-time)

In completing the following items, count each employee only once.

Administrators - 11 (full-time) 0 (part-time)

Teaching Staff- 59 (full-time) 9 (part-time)

Non-teaching staff- 37 (full-time) 8 (part-time)

Total Opening Enrollment - 527 Academic Years - 2014-2015

Enrollment at last accreditation visit - 498

What is total budget- \$15,230,240

What percentage of total revenue comes from: (percentages should add up to 100%)

Tuition - 93% Annual Gifts - 5% Investment/Interest Income - 2% Other - 0% Provide Tuition Range for total academic year of the self-study - \$29,468

Tuition Reductions (include financial aid, tuition remission, and merit awards)

Amount of Tuition Reductions awarded in the academic year of the self-study - 96 students received FA

Tuition Reductions as a percentage of gross Tuition Revenue - Need-Based Aid/Financial Aid Budget is 7.5% of

Tuition Revenue (Financial Aid Budget plus restricted funds for scholarships: 9%)

Percentage of students receiving tuition reductions - 18%

## NWAIS Accreditation Visiting Team Members

Name	School
Liz Swift (chair)	Holy Names Academy
Barrie Hillman (vice-chair)	West Sound Academy
Matt Levinson	University Prep
Donna Dunn	The Bear Creek School
Francoise Deeg-Legal	Seattle Academy of Arts and Sciences
Halsey Bell	The Evergreen School
Chris Hartley	Lakeside School
John Holloran	Oregon Episcopal School
Bill Mancuso	The Adelson Educational Campus
Flora McEachern	Bright Water School
Peter Rayls	St.Mary's School
Kate Taylor	Rowland Hall

## Table of Contents

Section	Page Number(s)
School Mission Statement/Philosophy	6
Introduction	7
Overview of the Team's Findings	8
Major Commendations	10
Major Recommendations	11
NWAIS Self Study Process	12
School Mission	13
Overall School Program	14
Literacy	18
Counseling and Advising	20
Co-Curricular Program	22
Arts	25
English	27
Mathematics and Technology	29
Modern and Classical Languages	31
Physical Education and Health	33
Science	34
Social Studies	36
School Culture	39
Commitment to Diversity	41

Institutional Leadership	43
Finance	45
Administration	47
Institutional Advancement	49
Enrollment Management	51
Human Resources	53
School Plant	56
Health and Safety	58

## SCHOOL MISSION STATEMENT/SCHOOL PHILOSOPHY

Inspire excellence, Develop intellectual curiosity, Teach responsibility, Embrace diversity, and Foster a compassionate community

## INTRODUCTION

The Overlake School was founded in 1967 by Charles Clarke and others who had a vision for a school where “capable students can be challenged by creative teaching with a challenging curriculum, and where close personal relationships and small classes are the essential parts of the foundation of the school.” Elements of this founding vision were definitely evident to the Visiting Team.

In 1972, the school moved from a rented facility in Bellevue to its current location, a 73 acre former working farm located off Redmond Road. Over the years, the school has developed both its programs and its campus.

From 1999 to 2011, the school implemented an ambitious master plan to create a campus that supported the growing program and enrollment. During these years, seven new buildings were added to the campus: Humanities building, Technology and Language Center, Fulton Performing Arts Center, Campus Center, Gym, Front Office, and the Fifth and Sixth Grade Center. All of this was accomplished by funds raised through capital campaigns and bond financing.

In the same timeframe, the school shifted its focus to a more traditional curriculum, including an emphasis on Advanced Placement courses. Meanwhile, the school retained its founding priority of fostering strong relationships between staff and students, and this was abundantly evident to the Visiting Team. Overall, the school is balanced across all subject areas and provides a strong liberal arts education.

The Head of School and Board of Trustees drafted a new strategic plan in 2015, which addresses three areas: enhancing the educational experience, building new science and math facilities, and increasing endowment for financial assistance. By the time of the visit, several of the initiatives related to the educational experience had already been implemented. A capital campaign is being considered to fund the new facilities and to increase the endowment.

## OVERVIEW OF TEAM'S FINDINGS

As The Overlake School approaches its 50th anniversary, it can be justly proud of its accomplishments and of the outstanding school it has become. Stable enrollment, fiscal stability, a robust educational program, excellent facilities, and ongoing strategic planning underscore the vitality and viability of this institution.

The Overlake School is a vibrant community of students, parents, faculty, staff, and trustees. There is a clear sense of mission and purpose, with everyone working together for the common good of the students. The school served as superb hosts for the Visiting Team, both in terms of the “care and feeding” of their guests and in terms of the receptivity of everyone to conversation and discussion.

It is immediately apparent to anyone who walks onto the campus that this is a student-centered school. Faculty, staff, and administrators take a personal interest in students and work hard to ensure their success. Students were actively engaged in learning and encouraged to participate in multiple areas of the program. There is a supportive and inclusive environment that is highly conducive to teaching and learning. Parents and students expressed great satisfaction in the program and highly value the close relationships and mutual respect among students and between students and teachers.

The tremendous growth in program, facilities, and financial security over the last 50 years is a tribute to the strong leadership and dedication of the Board of Trustees and the Head of School as well as to the administration, faculty, and staff who so diligently implement the mission of The Overlake School. The campus is absolutely beautiful, the facilities serve the program well and are clearly well cared for by all, and there is a sense of order and purpose everywhere.

As the school has evolved and grown, so has the need for greater coordination and collaboration among teachers. The faculty and administration have been working on assessment rubrics for several years now to improve the consistency between teachers and among department members. With the launch of the new strategic plan, several additional teaching and learning enhancements are in progress. In order to provide time for meaningful collaboration, the school has reduced the faculty course load from five to four classes, and the department chair course load from four to three classes. The role of the department chair has been strengthened, and an instructional coach and technology mentor have been hired. Just this year, a BYOD program has been launched.

All of this change has led to some confusion and anxiety on the part of some faculty members. Several faculty members expressed the desire to have greater understanding of the overall vision for the program, as well as a greater voice in the implementation of new programs. Many expressed the desire to have more opportunity for discussion among department members and across departments. On the other hand, administrative team members indicate that they have tried to provide an overall vision as well as empowering department chairs to engage their department members in discussion.

This discontinuity may simply be the result of rapid change and the adjustments and frame of mind needed to move the school forward. Faculty members have historically enjoyed and valued a strong measure of autonomy and have used an informal teacher-to-teacher collaborative model to ensure consistency in the curriculum and student expectations. As the school has grown in size and complexity, collaboration alone is not sufficient to provide the vision, innovation, and consistency needed within and among departments.



The school also needs to develop a comprehensive curriculum guide for all departments and courses, as well as a process for ongoing review of the guide. The current curriculum guide is essentially a listing of one-paragraph course descriptions and provides little or no detail on student outcomes, skill acquisition, assessments, scope and sequence, or technology integration. There is also an outdated curriculum map that is essentially a horizontal presentation of course descriptions. Several departments are working on scope and sequence documents, with a couple of departments well on their way in this process. In addition to capturing the curriculum in a written document, the process for development of a curriculum guide should provide opportunities for meaningful discussions among faculty members. (Note: A recommendation for documenting the scope and sequence of each academic department as well as a recommendation to update the curriculum map were included in the Upper School Program section of the 2007 PNAIS Visiting Team Report.)

Finally, the school is running on a very lean leadership model, both at the administrative level and at the Board level. As the school contemplates a capital campaign and a large building project, resources are going to be stretched even further. All of the curriculum work is currently being directed by two division leaders and the head of school. The Board of Trustees is also in need of strengthening its membership. With only twelve current members, the Board is at the minimum level provided by its bylaws.

Furthermore, two members are slated to go off the Board at the end of this school year. It is imperative that the Board strengthen its process of identifying, cultivating, and recruiting Board members. Board members indicated to the Visiting Team that they have added five new committee members this year, some of whom will hopefully funnel into the Board in future years

## MAJOR COMMENDATIONS

1. The school has a dedicated and skilled Board of Trustees that has demonstrated a consistent commitment to strategic planning, fiscal stability, and institutional advancement.
2. The school is led by a dedicated and passionate Head of School and Administrative Team. Trustees, parents, students, and faculty/staff, expressed trust and respect for both the Head of School and the Administrative Team.
3. Students and parents expressed great appreciation for the strong relationships between students and faculty members. The faculty and staff are incredibly dedicated and student-centered. They bring great competence, enthusiasm, and a genuine passion to the institution.
4. Students, parents, and faculty/staff expressed an appreciation of the “open door policy” of the Head of School and the Division Directors.
5. Students and parents expressed great satisfaction with the Overlake experience. Parents spoke of their students becoming independent learners and self-advocates. Students spoke of the interesting classes, the personalized experience, and the genuine care they feel from the faculty. Students are engaged in learning and participate in multiple areas of the program. Several members of the community referred to “the culture of involvement.” As one parent expressed it, “This is the land of opportunities.”
6. The school has thoughtfully invested resources to improve and support the quality of instruction. In the last two years, the school has hired an instructional coach and a technology mentor. In the same time, the school has reduced the faculty course load from five to four classes, and the department chair course load from four to three classes.
7. The financial position of the school is strong. The school has operated consistently on a balanced budget, saved reserves, and has had great success in its development programs.
8. In the last decade, the school has completed an ambitious and thoughtful master plan of facilities. The overall design of the campus lends itself well to support the mission of the school.
9. There is a strong sense of community at Overlake. There is an atmosphere of collaboration and respect among all constituents. Faculty and staff often expressed their appreciation for the collegial atmosphere and the support that they received from their peers. Parents, students, and trustees were, in turn, often heard expressing their appreciation for the administration, faculty, and staff.
10. The Visiting Team experienced a genuine openness on the part of trustees, administration, faculty, staff, parents, and students to make the accreditation process a valuable experience for all. The team was impressed with the candor of all constituents and the willingness of all to engage the visiting team in meaningful dialogue.

## MAJOR RECOMMENDATIONS

The Visiting Team recommends the school:

1. Articulate an overall vision for the academic program that incorporates the strategic plan, is congruent with the school's mission and values, and engages the faculty in substantive discussions on the strategies for implementation both within and among departments. (School Program Standard, Indicators #1, 3, 7, and 8)
2. As the Strategic Plan 2015 states as a focus for department chairs, "guiding their departments through continual review and revision of the program's scope and sequence.": (School Program Standard, Indicator #6 and 14):
  - a. Develop a curriculum guide with a consistent format among departments, and in keeping with the strategic plan, design a review process for the guide that will incorporate future changes and considerations. Specifically, capture the curriculum in a written document and provide for ongoing review and analysis.
  - b. Give the academic departments clear guidelines on essential elements of the curriculum guide, including potential areas such as student outcomes, skill acquisition, assessments, scope and sequence, technology integration, cultural competency, and content.
3. Ensure adequate staffing on the academic administrative team to communicate and carry out the significant programmatic work underway. (Administration, Indicator 2)
4. Strengthen the process for the identification, cultivation, and recruitment of future trustees with a focus on the leadership needed to implement the strategic plan. Consider forming a governance committee to direct this process and to provide leadership in the recruitment, orientation, mentoring, training, and evaluation of trustees. (Institutional Leadership Standard, Indicators #5 and 9)

## NWAIS SELF STUDY PROCESS

The school has conducted a self study that provides for reflection and for broad participation of the school community in a way that illustrates the school's commitment to continual school improvement.

### **Observations:**

The Overlake School conducted a self-study that was process-oriented, mission-driven, and investigative, using the 2012 NWAIS Self Study Manual as its guide. The Board of Trustees affirmed the school's mission in October 2013, launching the school's "deep dive" into the Self Study process. A steering committee reviewed draft reports and created surveys. Parent volunteers, board members, students, faculty members, and resident outsiders, were appointed to various committees.

Students were surveyed separately during the 2014/2015 school year, as were staff members. Board members, alumni, and parents shared one survey. Faculty feedback was collected during faculty meetings but the faculty, unlike all other constituents, was not formally surveyed. It was decided that, given the high percentage of newly hired faculty, the time was not optimal for a comprehensive survey.

The school's thorough response to the major recommendations in the previous accreditation report, the regularly conducted departmental audits, and the response to the suggestions given by auditors, illustrate the school's commitment to continual school improvement.

### **Commendations:**

The Visiting Team commends the school for:

1. Delivering a well-organized, online/e-reader accessible Self Study document and setting up the Visiting Team well to do its work.
2. Addressing all major recommendations from its 2007 accreditation visit, reviewing administrative structure and staffing needs, clarifying its philosophical foundation, fine tuning its marketing message, and meeting its growing facilities needs.
3. Conducting the Self Study during a time of substantial changes: arrival of a new Head, as well as the implementation of a reduced teaching load for all, leading to the hiring of a large number of new faculty.

### **Recommendations:**

The Visiting Team recommends the school:

1. Conduct a formal survey of its faculty. (Self-Study Process Standard, Indicator #2)

### **Suggestions:**

The Visiting Team suggests the school:

1. Explore the nature of the communication between administration and faculty and identify ways of improving it.

## SCHOOL MISSION

The school's mission is understood and supported by all constituencies.

### **Observations:**

The Mission, like the Flagpole around which its words are inlaid, exists at the heart of The Overlake School. Conversations with faculty, administration, parents, students and staff revealed an overall understanding of and satisfaction with the role of the Mission, the guidance that it offers, and the kind of community that it helps create. Standouts include the Mission's focus on diversity and community and its emphasis on fostering student responsibility and self-advocacy. Parents were quick to define "Inspire Excellence" in terms of students doing their best (as opposed to being in direct competition with each other). Parents defined diversity in terms of students being able to be themselves, to be unique individuals.

In written documents, especially those related to curriculum, the Visiting Team found fewer explicit references to the Mission and its role in informing program. The Visiting Team, did however, observe frequent, informal, references to aspects of the mission in conversations (e.g. the role of excellence or responsibility in the student's lives, and the role that faculty play in response).

### **Commendations:**

The Visiting Team commends the school for:

1. Enthusiastic understanding of and support for the Mission as written.
2. The clear sense of community and shared values that the Mission inspires.

### **Recommendations:**

None

### **Suggestions:**

The Visiting Team suggests the school:

1. Develop a statement of pedagogical approach or expected outcomes/competencies of an Overlake education needed for students to live the Mission as graduates.
2. Consider developing language that can bridge the distance between the language of the Mission and the language of the individual program components (e.g. departmental curriculum documentation).

## OVERALL SCHOOL PROGRAM

The school provides a mission–congruent educational program designed and implemented to promote the development of its students and in keeping with NWAIS core values. The program benefits from ongoing assessment and research, is supported by necessary resources and services, and provides for the assessment of student progress consistent with the school’s mission.

### **Observations:**

The Visiting Team observed innovative and well–designed programs in the academic and co–curriculum spheres. Students were highly engaged in multiple programs throughout the school day, well into evening hours. The Visiting Team observed a high level of engagement among students in classes. Students spoke up in clubs, activities, and class discussions and appeared challenged and supported in appropriate ways. Furthermore, they praised the quality of teaching and the relationships they have with each other and their teachers. Students also praised the opportunities the program gave them to work together and connect with different kinds of students in a variety of ways. Students participate widely in many aspects of the program. Students spoke of the value they place on their independence and the sense that they are listened to by teachers and the administration. In conversations with students, the Visiting Team heard a particular appreciation for the sense of community that the intentional program develops.

Faculty and parents expressed appreciation for the level of communication and collaboration among the faculty in providing the students a positive and consistent classroom experience. Faculty appreciated the academic freedom to design courses collaboratively. Staff members expressed appreciation for the opportunity to take on roles as club advisors with the permission of supervisors.

The strengths of the program reflect a sustained, Board–directed strategic initiative to renew the program. In the last two years, the school has undertaken several broad and far–reaching initiatives to develop, extend, and articulate its program, including the following:

- reduced faculty course loads from five to four classes and hired seventeen new faculty
- scheduled regular department meetings
- reduced the teaching load of department chairs to support increased curriculum development and collaboration among department colleagues and grade–level teams
- called for a curriculum deep–dive by department
- initiated a focus on assessments and the development of departmental rubrics to improve feedback to students and families
- hired an instructional coach and a technology mentor, and
- created a department of experiential education.

Time has been set aside for Department Chairs to meet with the administration to discuss the program initiatives. Faculty are in the early stages of expanding their familiarity with the Canvas learning management system and a new Bring Your Own Device (BYOD) student technology initiative. The school is also in the middle of a strategic diversity initiative.

Club advising is no longer a stipended activity. In addition, faculty report having been asked to substitute teach for each other in the place of hiring outside substitute teachers. Time has been allotted for grade level teams to meet regularly, and those faculty who are able to meet together appreciate that opportunity. Other teachers unable to meet at those times expressed a desire to

be more linked into those or similar conversations.

While the faculty voiced appreciation and support for each initiative, they also expressed a desire to have broader conversations about direction, common philosophy, and expectations/intended outcomes of the initiatives. They also expressed a desire greater communication from the administration. The Visiting Team observed that departments were in different stages in discussing assessment strategies, developing rubrics, and completing scope and sequence documents. Chairs, for their part, while appreciating the new constructive tone of department chairs meeting, voiced the desire for professional development opportunities to help them grow as leaders of curriculum development and facilitators of faculty collaboration.

In conversations with faculty, the Visiting Team observed evidence of some faculty fatigue around the number of initiatives circulating at once, as well as frustration and uncertainty about the direction, timeline, and intended outcomes of the various initiatives. Others voiced appreciation for the added time to collaborate, and enjoyed the opportunities to substitute and see each others classrooms.

The Visiting Team often heard the term 'silo-ed' used to describe a sense of isolation of faculty into departments and programs. Faculty were eager to find ways to collaborate with colleagues outside of their 'silos', and to be given time, guidance, and structures to connect and develop interdisciplinary and integrative programs. Program directors who are not academic department chairs expressed a desire to have a similar cohort group and to have greater access to the conversations being had at the Department Chairs meetings. Other faculty expressed a desire to better understand what happened at Academic Council and Department Chairs meetings.

At the time of the visit, there was no written curriculum guide for the school (beyond a course catalog) that articulated departmental scope and sequence of skills, assessments, and understandings. Several faculty voiced eagerness to be able to see scope and sequence documents of other departments to better facilitate interdepartmental work and/or efforts at integration of the curriculum. Others expressed concerns about grading and assessment standards, and inconsistency of homework load. They shared that a test calendar could help faculty better coordinate the timing of assessments.

Some faculty reported they felt an inherent and growing tension between asking students to try many of the new programs and asking them to perform at a high level. For example, plays now practice five days a week, as does the robotics team, as do varsity sports, and students are eager to take as many Advanced Placement tests as possible. Faculty, students, and parents, however, appreciated the role that teachers and advisors play in helping students make choices and manage their time.

The one key area of program that the Visiting Team heard the most concern about was the current scope and sequence of the Science Department curriculum. Parents and students alike expressed a desire to have alternative tracks for students who wish for more flexibility and differentiation.

Visiting Team members observed excellent teaching taking place in the classrooms, students actively engaged in their learning, and heard and read about impressive student outcomes.

Most of the work the Visiting Team envisions for the school addresses issues of refinement: coordinating an expanding program, reaffirming/re-articulating the school's program philosophy, and leveraging collaboration to build community.

### **Commendations:**

The Visiting Team commends the school for:

1. A wide variety of high quality programs that allow students to challenge themselves, try new things, and explore areas of passion.
2. The strategic direction of resources to transform its curriculum.
3. The collaborative and innovative spirit of a highly talented, engaged, dedicated, and caring faculty and staff.
4. The high level of participation and enthusiasm for the existing program expressed by parents and students.
5. The innovative co-curricular programming, especially in the creation of a Experiential Education Department
6. The cultivation of department chairs to a greater leadership roles in the development of the academic curriculum.

### **Recommendations:**

The Visiting Team recommends the school:

1. Articulate an overall vision for the academic program that incorporates the strategic plan, is congruent with the school's mission and values, and engages the faculty in substantive discussions on the strategies for implementation both within and among departments. (School Program Standard, Indicators #1, 3, 7, and 8) Major Recommendation #1
2. Develop a curriculum guide with a consistent format among departments, and in keeping with the strategic plan, design a review process for the guide that will incorporate future changes and considerations. Specifically, capture the curriculum in a written document and provide for ongoing review and analysis: (School Program Standard, Indicator #6 and 14) Major Recommendation #2
  - a. Give the academic departments clear guidelines on essential elements of the curriculum guide, including potential areas such as student outcomes, skill acquisition, assessments, scope and sequence, technology integration, cultural competency, and content.
3. Provide faculty with opportunities for more interdepartmental discussions about curriculum initiatives, pedagogy, and curriculum integration – for example, information literacy, research, diversity/cultural competency, technology and learning differences – in such a way that they align the curriculum to the philosophy, values, and mission of the school. (School Program Standard, Indicator #1, #3, #5, #6, #7, #8).



**Suggestions:**

The Visiting Team suggests the school:

1. Consider developing a statement of a shared set of interdepartmental student outcomes or competencies that are designed to help students and faculty understand how all the parts of the program scope, sequence and converge developmentally.
2. Consider the appointment of an academic dean/director of curriculum who could support department chairs, guide and facilitate curriculum initiatives, design of program documentation, support internal and external professional growth opportunities, and help with lines of communication among faculty, chairs, and administrators.

## LITERACY

The school provides a mission–congruent educational program designed and implemented to promote the development of its students and in keeping with NWAIS core values. The program benefits from ongoing assessment and research, is supported by necessary resources and services, and provides for the assessment of student progress consistent with the school’s mission.

### **Observations:**

The literacy program at Overlake is a collaboration between librarians and teachers with a focus on proper citation, digital literacy, research skills, and the responsible use of copyrighted sources. Members of the community confirmed that librarians enter into classrooms and offer direct instruction, recommend resources, and introduce software tools. Teachers reported to the Visiting Team their appreciation for the ways the librarians collaborate with them to develop research resources for students and projects, including finding tools, digital databases and print collections. Faculty expressed appreciation for the responsiveness of librarians to teacher and student needs, the work of the literacy program in educating students about the habits of good scholarship (proper citation, media savvy), and for the technology tools for students, such as video production equipment. However, the Visiting Team observed less opportunities for collaboration with librarians and literacy education throughout the school program. Additionally, faculty report learning about the literacy program through mentors or informal conversations, but no formal program exists to orient new faculty in the common literacy/citation practices and library-supported software tools available to students.

The school has made efforts to increase general knowledge of citation practices and to educate students around issues of plagiarism and ethical use of sources. Specifically, faculty and students reported that the use of *Canvas* and *Turn It In* helped raise awareness around proper citation. In addition, students and parents expressed the belief that students are well prepared for the literacy demands of college.

In general, the Visiting Team observed a love of reading among students and a healthy use of the library as a space for reading, writing, and creative technology use. Constituents throughout the campus attributed these qualities to the strength of the literacy program.

### **Commendations:**

The Visiting Team commends the school for:

1. A thoughtful and proactive literacy program.
2. A well-used, well-loved, recently-remodelled, intentionally-designed library space that fosters student collaboration, quiet study, and multimedia production.
3. A dedicated, resourceful, and responsive library staff.
4. Strong collaboration between librarians and classroom teachers (particularly the English Department).
5. A wealth of online databases and digital reading resources.

6. The implementation of Canvas and Turn It In as a way to teach students about paraphrasing and proper citation.

**Recommendations:**

The Visiting Team recommends the school:

1. Consider the creation of a working group, in addition to the librarians, to help develop a clear scope and sequence for the literacy program, including a selection of Chairs or department delegates (e.g., English & History, Technology Mentor, Learning Specialist, etc.). (School Program Indicator #7)

**Suggestions:**

The Visiting Team suggests the school:

2. Consider developing a guide detailing skills and habits of mind involved with research and information literacy (scholarly best practices) for students and faculty, including the use of creative commons and copyright.
3. Work with departments to expand the scope of research projects in the Upper School.
4. Consider developing a new faculty orientation for the library and literacy program and its resources, for example, Noodle Tools.

## COUNSELING AND ADVISING

The school provides a mission–congruent educational program designed and implemented to promote the development of its students and in keeping with NWAIS core values. The program benefits from ongoing assessment and research, is supported by necessary resources and services, and provides for the assessment of student progress consistent with the school’s mission.

### **Observations:**

The college counselors, personal counselors, and learning specialists work as a cohort and are housed in the same space. The work of this group is proactive in nature. The college counseling office has created a program that allows those middle school families who want some information to have appropriate access without creating undue early anxiety. As students move from grade 9 through 12, they are supported by the college counseling team. If students and families follow the steps outlined by the college counselors, the process appears to run well and lead to great outcomes.

The counselors and learning specialists each serve two main roles. The first relates to supporting individual students. When a student is struggling, a counselor and/or learning specialist supports the student and helps that student recover and/or grow. When necessary, the team refers students to external resources such as private tutors or mental health professionals. For the most part, families are responsible for the expenses incurred when accessing off-site services. The second relates to supporting groups of students through their teacher. Counselors give tools to teachers so that they are better equipped to help students. The learning specialists also work with middle school students in study halls to help with study skills and organization.

The advising system relies on the work of most teachers and several administrators and staff. Students are placed in groups of about ten. Middle School advisors stay with students for one year; this allows for teaching teams to meet with grade level advisors present. Upper School advisors work with students for four years; this gives continuity to the student’s experience since teachers change every year. Meetings in both divisions are informal, giving students a time in the day when they can relax and connect. Some advisory groups order special lunches or purchase apparel like advisory-themed sweatshirts. The advisory system is the school’s strategy for ensuring that every student is known. The advisory groupings are not based on related interests. This gives students the chance to interact with a group of students with whom they might not otherwise connect.

### **Commendations:**

The Visiting Team commends the school for:

1. Creating a team of experts – college counselors, personal counselors, and learning specialists – who encourage, support, teach, and advise students through challenging situations, significant life events, and management strategies.
2. Supporting faculty and staff by giving them the necessary tools to support students when crises occur.
3. Continuing to offer a systematic, strategic college counseling process for all families in the school.
4. Thoughtful supervision and support for the advising system in both divisions so that every

child is known and so that adults know where to go when support is needed.

5. Investment in creating close relationships built on trust that lead to effective mentoring and support.

**Recommendations:**

The Visiting Team recommends the school:

1. Look at how advisory activities that result in students being billed (e.g. advisory lunches) may affect families and the overall sense of an inclusive culture. (School Program Standard, Indicator #1, 9)

**Suggestions:**

none

## CO-CURRICULAR PROGRAM

The school provides a mission–congruent educational program designed and implemented to promote the development of its students and in keeping with NWAIS core values. The program benefits from ongoing assessment and research, is supported by necessary resources and services, and provides for the assessment of student progress consistent with the school’s mission.

### **Observations:**

The Overlake School offers an extremely robust co–curricular program, comprised of multiple programs that are an integral part of the school. In conversations with every constituent group, it was mentioned that these co–curricular offerings are at the heart of what is valued at Overlake: the development of a well-rounded student who has the opportunity to take risks and try new activities. As evidenced in participation numbers and anecdotally from teachers, administrators, students, and parents, there is an enormous perceived value in participating in these various programs. Students join sports teams, engage in service learning, participate in clubs, perform in musical productions, and go on outdoor excursions in amazing numbers.

Particularly impressive are the efforts taken by the various program heads to collaborate with their colleagues to schedule these activities in such a way as to maximize student involvement. Whether implementing structural changes in the schedule or negotiating arrangements as issues come up, the school demonstrates great effort to eliminate scheduling conflicts. Also impressive is the creation of a department of experiential education; this innovative step will allow for greater integration of these experiential programs into the core academic program.

In reviewing the structure, policies, and forms associated with each co-curricular program, the Visiting Team found that these programs are well developed, institutionalized so as to survive any one program leader, and meet professional standards. As a sign of the professionalism with which they are run, many of these programs have undergone independent audits over the last several years which reflect quite favorably on the school.

Many of the programs have identified and clearly articulated the educational goals of their programs. What is less clear, is whether they are effective in delivering on these goals; the anecdotal evidence and participation numbers would indicate that the programs are effective.

While program leaders spoke of the support they receive from the administration and had a deep appreciation for it, there were also some concerns expressed by various program leaders as related to the channel of communications. In particular, the athletics department expressed concern about whether their voice is being heard at important decision–making tables, and the experiential education department hoped they would have a voice at the Academic Council in a manner that would reflect their status as a department.

In discussing the various co–curricular activities with faculty and staff, it was clear that there are many direct and indirect financial costs associated in participating fully in student life at Overlake. While Overlake is making an effort to fund as much of these costs as they can or eliminate the additional costs, there was some confusion amongst faculty and staff about how the financial aid process works for covering these costs.

**Commendations:**

The Visiting Team commends the school for:

1. Creating institutionalized programs with the framework in place (structure, forms, and policies) to endure beyond any single program head.
2. The very high rates of participation in all of these various co-curricular programs.
3. Their innovative approach to structuring the various experiential programs into a cohesive department (Experiential Education department) has begun to allow for collaboration between these various programs and will fuel even greater integration with the other core academic disciplines.
4. While striving to develop the best programs, program leaders and faculty work hard to prioritize student well-being by coming up with solutions to allow students to participate fully in multiple co-curricular programs.
5. Many departments go through an audit on a regular cycle; bringing in an outside evaluator.
6. The Athletic Department demonstrates a high priority on the teaching of character and values, with winning a byproduct of these efforts.
7. The school has created a structure that supports student initiated clubs. This student centered approach has resulted in a vast number of clubs that speak to students' interests and so there is a high level of student participation.

**Recommendations:**

The Visiting Team recommends the school:

1. Review of all extra costs necessary to participate in student life at Overlake and then develop and/or communicate more clearly the systematic process for handling student financial aid needs that will allow them to fully participate in all of the co-curricular activities. (School Program Standard, Indicator #1 and 9) See Enrollment Management Recommendation #1 and Finance Recommendation #4
2. Examine the structure or communications channel that would ensure that leaders of major programs have their voice heard in decision making bodies. In particular, given the high profile and participation rate, it would be worth re-examining whether the Athletic Department's perspective is sufficiently considered in administrative decisions. (School Program Standard, Indicator #7)
3. Articulate the goals for each co-curricular program and establish a formal process to assess the effectiveness of the programs. (School Program Standard, Indicator 9, 12)

**Suggestions:**

The Visiting Team suggests the school:

1. Take advantage of the opportunities presented by the creation of the Experiential Education department and look for ways to connect it with the core classes to increase integration.
2. Seek administrative support to improve collaboration with Communications department in order to better promote Athletic Department events.
3. The Athletic Department could work to identify the values they seek to impart to each athlete and then develop a clear and consistent way of training coaches in the teaching of these values.
4. Consider whether the Experiential Education department should be represented on the Academic Council to increase their collaboration with other departments.
5. Evaluate whether there would be synergies in bringing the Senior Project program into the Experiential Education department.



## ARTS

The school provides a mission–congruent educational program designed and implemented to promote the development of its students and in keeping with NWAIS core values. The program benefits from ongoing assessment and research, is supported by necessary resources and services, and provides for the assessment of student progress consistent with the school’s mission.

### **Observations:**

The Overlake School offers an extensive Arts Program helping to create a well–rounded education for all of the students. Mandatory arts are an integral part of what differentiates Overlake’s curriculum. All students are required to take a minimum of arts credits spread across the disciplines of music, drama and visual arts. Many students choose to partake in Zero Block art lessons as well. The fact that the Art Department offers these early morning classes and that they are well attended demonstrates the significant appreciation for the Arts within the Overlake student body.

OFTA (Overlake Friends of The Arts) is a volunteer parent–led body that supports the department with everything from publicity to instrument procurement. This group’s support is essential to the success of the major drama productions which take place at least four times a year. However, OFTA cannot fulfill all of the publicity needs of this robust Art Department.

The Overlake Art Faculty has an extremely low turnover, and multiple teachers have been with the school for over twenty years. There is a strong sense of collegiality between members of the faculty. With the change of teaching load, there has been the addition of a new music position. The person in this position also serves as a substitute throughout the school.

The Art Faculty is in the process of developing rubrics and assessment tools that are effective. These will be implemented over the course of the year. This new way of recording data will help the department align its assessments across all disciplines.

In the Visual Arts, there is a large variety of mediums available for students to explore, and the nature of the assignments creates a diverse experience. Within the Drama classes, there is a place for everyone to express himself theatrically, be it through traditional acting or stage craft. The breadth of Music classes offered gives everyone an opportunity to experience a musical education. Overlake’s Art Program is inclusive and supports the mission of the school.

Students and teachers appear to be happy and healthy creating a vibrant, supportive and inspiring artistic environment.

### **Commendations:**

The Visiting Team commends the school for:

1. The Music Department that has completed a scope and sequence curriculum guide that clearly states goals and skills. Its format is clear and concise.
2. The respect and collaboration across the disciplines of Visual Arts, Music and Drama.
3. The work of the students that is highly visible on campus and enriches the visual and auditory experience of the community.

4. The collaborative relationships between students and teachers that both students and faculty spoke about.
5. The clear dedication to creating a diverse curriculum that embraces diversity and intellectual inquiry.
6. An Arts Faculty where the majority of teachers continue to be active practicing artists in the community outside of Overlake and are supported in this work by colleagues and administration.

**Recommendations:**

The Visiting Team recommends the school:

1. Complete the scope and sequence and curriculum guide for Visual Art and Drama. (School Program Standard, Indicator #6) See Major Recommendation #2

**Suggestions:**

The Visiting Team suggests the school:

1. Consider requesting the Communications Office support outreach efforts for Arts events.
2. Consider having some department-wide goals to increase the outside community's awareness of the Overlake Art Department.

## ENGLISH

The school provides a mission–congruent educational program designed and implemented to promote the development of its students and in keeping with NWAIS core values. The program benefits from ongoing assessment and research, is supported by necessary resources and services, and provides for the assessment of student progress consistent with the school’s mission.

### **Observations:**

The Visiting Team observed a well–situated English Department that is ready to benefit from both the voices of experience and the new vision brought by more recent additions to the department. The program prides itself on offering rigorous evaluation and feedback (rigorous not just from the student perspective but in the work of teachers, too). Their focus on feedback is apparent and given meaning by their consistent and pioneering use of rubrics for evaluation of major assignments across middle and upper school English classes and their use of portfolios throughout the upper school grades to encourage student reflection on and growth in skills. This commitment to reflection and assessment extends from their work with students to their own work as a department as they begin to develop an explicit scope and sequence document, beginning with the question: “What do we want a graduate from our Overlake English Department to look like?” Individuals commonly cited relationships amongst the team and with students as the most valuable aspect of the department culture. Indeed, the Visiting Team consistently observed a comfortable, coaching relationship with students and a lively collaborative relationship between colleagues throughout the English Department. Alumni, students, and parents report a high level of preparation for the writing demands of college courses.

### **Commendations:**

The Visiting Team commends the school for:

1. A department that has created a culture of collaboration and reflection across the department, resulting in a well–scaffolded and effective department that consistently produces college–ready writers.
2. Department members who have pioneered the consistent use of rubrics for assessment and feedback across all classes; this model has recently been taken up by the school as a whole, and the English Department is in a good position to make effective use of the new rubric–based midterm and semester feedback system.
3. Curriculum choices and course themes that promote diversity and inclusion.
4. A department who has fully committed to working with librarians to develop literacy and has created several innovative programs to promote reading and writing, such as the Writer’s Workshop.

### **Recommendations:**

The Visiting Team recommends the department:

1. Complete work on scope and sequence documents and consider how to create opportunities to coordinate with other departments when future opportunities for such collaboration arises. (School Program Standard, Indicators #6 and #7) See Major Recommendation #2

**Suggestions:**

The Visiting Team suggests the department:

1. Find ways to promote student resourcefulness in order to give them more tools for self-evaluation and regulation. This may lead to opportunities for the department to strategically reduce scaffolding and written feedback, and encourage student self-evaluation (in addition to the impressive student-reflection already implemented).
2. Look for opportunities to align with other departments not just in terms of themes but also in skills.
3. Consider additional approaches to solving the gender-imbalance problem in the AP curriculum. In addition to the ideas already developed – opening more sections, providing training for additional faculty in the AP Lang curriculum, and eliminating the recommendation requirement for entry into the class—the department could also consider solutions such as creating single-gender English classes, revising recommendation standards, or reimagining how the course is structured and implemented.

## MATHEMATICS AND TECHNOLOGY

The school provides a mission–congruent educational program designed and implemented to promote the development of its students and in keeping with NWAIS core values. The program benefits from ongoing assessment and research, is supported by necessary resources and services, and provides for the assessment of student progress consistent with the school’s mission.

### **Observations:**

Please note that these observations are split into two separate categories: mathematics, which houses the computer programming classes; and technology, as it relates to the implementation of hardware, systems, and instructional support.

The mathematics department has age and ability appropriate courses beginning in the 7<sup>th</sup> grade. The courses intentionally prepare students for the next course through skill building, homework expectations, course materials, and assessments. In the fifth and sixth grade classes are not tracked and students are introduced to mathematical concepts through manipulatives and problem-solving situations. In the seventh grade students are placed in either a one–year algebra or a two–year algebra. Students follow these trajectories through the Upper School leading to the completion of Calculus at either the AP or non-AP level. In the high school students are tracked further into either honors or non-honors sections. Classroom instruction in the high school tends to be more traditional with the teacher up front and students at desks. The emphasis in these classes is theoretical mathematics. Many students take at least one AP course. Though a mathematics curriculum guide does not exist, courses are structured with the goal of preparing students to complete Calculus. Teachers use a wide range of technology including the tools available on *Canvas*, *OneNote*, *Inspire* calculators, and interactive projectors. Instructional time includes reviewing of homework problems, exploration of new concepts, connection of past concepts to new ones, and time for students to practice. Computer science classes are offered in the high school as elective opportunities for students. These classes encompass introductory to AP classes and beyond. Classrooms are engaging, and relationships between teachers and students are warm and respectful.

The technology department is in an exciting time of growth and development. With the adoption of the BYOD (Bring Your Own Device) initiative, technology needs have changed and roles within the department are being redefined. This summer, the wireless network was updated. At the beginning of the school year, teachers were hesitant to teach a lessons which relied on the network given some of the inconsistencies in the system. At this point, it appears that most of the network issues have been addressed. To support the BYOD initiative, a technology mentor was hired to work with teachers. The mentor started the year working with the 5<sup>th</sup> and 6<sup>th</sup> grade teams as they worked to transition their students to a BYOD. The mentor is now working with other grades and departments to help them integrate technology into their classes. The department is reviewing what role computer labs play given BYOD and is considering revamping the labs to become more of a digital media, film and audio space.

### **Commendations:**

The Visiting Team commends the school for:

1. Using a teaching style of inquiry and directed exploration to help students draw connections between concepts and deepen understanding (math and computer science).

2. Creating safe spaces in which students feel supported and encouraged by their teachers, allowing students to fully engage in the discovery process and not worry about being “wrong” when solving a problem or offering an answer (math and computer science).
3. Creating a staff position to support teachers in creating lessons, strategies, and projects that use technology (technology).
4. Offering new laptops to any student who receives financial aid so that those students cannot be identified as financial aid students (technology).

**Recommendations:**

The Visiting Team recommends the school:

1. Consider expanding role of technology at the school given BYOD initiative with a focus on how technology can be used to improve teaching and learning in all areas. (School Program Standard, Indicator #3,4,8)
2. Create a curriculum guide that includes intended outcomes, including skills, for the math department. This document will be updated when courses change or are added and should be updated when technology influences projects or lessons (proficiency with programs, learning a programming language, etc.). (School Program Standard, Indicator #6) See Major Recommendation #2

**Suggestions:**

The Visiting Team suggests the school:

1. Explore opportunities for more students to learn about computer programming, whether in existing math classes or by creating new classes.
2. Determine the appropriate balance of lessons, projects, and assessments in theoretical and applied mathematics, especially in the upper level courses.
3. Consider a different space or rearranged space for the technology department that invites more interaction with students and faculty/staff especially as the BYOD initiative matures.

## MODERN AND CLASSICAL LANGUAGES

The school provides a mission–congruent educational program designed and implemented to promote the development of its students and in keeping with NWAIS core values. The program benefits from ongoing assessment and research, is supported by necessary resources and services, and provides for the assessment of student progress consistent with the school’s mission.

### **Observations:**

The Modern and Classical Language program at Overlake fosters intellectual curiosity and the pursuit of excellence in offering a challenging curriculum relying primarily on immersion experiences, but using a wide variety of teaching styles and pedagogies. Students enjoy and are interested in language study, as revealed by the large proportion of students enrolled in high-level, elective courses, and the enthusiasm exhibited during classes at all levels. In most classroom observed, students were very engaged and eager to learn. The affection between teachers and students was evident.

The Modern and Classical Languages department is the largest of the school, and its faculty recognizes the importance of hiring faculty experienced in age–specific pedagogies (Middle–Schoolers, or advance learners). Seven out of fourteen Language teachers are new to Overlake. While being sensitive to the fact that it will take time to do so, the teachers look forward to this opportunity to re-set priorities and to shape a new identity for the department. The Modern and Classical Languages Center is a welcoming and spacious facility, which, because of the recent phasing out of Japanese now has a large office for the Modern and Classical Languages faculty. This facilitates a strong camaraderie between and among department members, and helps making the numerous new teachers feel supported by their veteran colleagues.

All teachers of a given language have a common free period (Upper and Middle School Spanish Teachers have separate free period). All department members express an acute desire for collaboration time when they can all get together to, plan, discuss, design, and exchange ideas.

In the high school the most advanced classes end with students taking AP classes in all of the languages. Students are prepared for the AP tests and have traditionally scored well on them. The Department has, however, found a way to provide alternate paths for those students eager to pursue their involvement in a Foreign Language without being narrowed down by a strict AP curriculum. There is a non AP, 5th year modern language classes that is more communicative in nature, and a Latin 6 class that is actually an introduction to comparative linguistics.

Members of the Modern and Classical Languages noted sometimes feeling disconnected from the rest of the school; not being part of the MESH meetings prevents them from sharing their perspective and hearing information about their students. Department faculty expressed the concern that language can be perceived by some students and colleagues and parents as less valuable, or deserving less time and attention than other subjects.

**Commendations:**

The Visiting Team commends the School for:

1. An exceptionally well conducted inclusion of a large group of new teachers into the Modern and Classical Languages faculty, and the establishment of a positive and convivial working relationship between 'old timers' and recent hires.
2. A language faculty with a deep enthusiasm for their language(s) and their students.
3. The department's successful efforts to find a way to accommodate diverging needs of students: those whose goal is proficiency in the language, and those who take the AP exam.

**Recommendations:**

The Visiting Team recommends the school:

1. Formally complete and make available fully articulated Modern and Classical Languages Scope and Sequence maps (with goals, practices, and coherence). Individual language teachers do carefully produce and update such documents, but these should be part of a larger, school-wide process.(School Program Standard, Indicator # 7) See Major Recommendation #2
2. Explore vehicles to connect Modern and Classical Languages with other disciplines, and language teachers with teachers from other departments, and the school community as a whole. (School Program Standard, Indicator #5)

**Suggestions:**

The Visiting Team suggests the school:

1. Provide better communication and guidance from division heads on curriculum initiatives.
2. Schedule departmental meeting times when all language teachers can attend.
3. Facilitate collaboration between the Modern and Classical Languages department, the Diversity program, and the Experiential Education department, to enhance the desired visibility of the department within the Overlake community, as well as its participation in linguistically diverse communities.
4. Consider including foreign language teachers in the MESH and other cross-departmental meetings.



## PHYSICAL EDUCATION AND HEALTH

The school provides a mission–congruent educational program designed and implemented to promote the development of its students and in keeping with NWAIS core values. The program benefits from ongoing assessment and research, is supported by necessary resources and services, and provides for the assessment of student progress consistent with the school’s mission.

### **Observations:**

The Overlake School has excellent PE facilities and equipment, with the opportunity for students to explore an impressive array of activities from archery to sports medicine to yoga. There’s a notable emphasis on fitness, and students utilized pedometers and heart rate monitor watches while they ran through their paces in class. The health classes complement the PE courses to provide a well–rounded environment in which students learn the importance of good nutrition, good health choices, and sufficient physical activity. All classes observed by the Visiting Team were well organized, no time was wasted, and had 100% student participation in the various activities.

The enthusiastic and experienced PE faculty is clearly much loved by the students. When the teachers were walking in other parts of campus, students came running up with big smiles to say hello. In fact, an overall display of joyfulness was noted in the PE classes – students happy to be exercising.

One mission the faculty is aware of is the opportunity PE offers to help students manage and polish their social interactions. The Visiting Team noted intentional positive interactions between teachers and students, meant to model and mold group cooperation, intercommunication, and basic kindness.

### **Commendations:**

The Visiting Team commends the school for:

1. A robust and purposeful PE program.
2. An emphasis on fitness at all grade levels with good gender balance in fitness courses.
3. A positive and collegial veteran faculty working together, daily prepared, yet flexible to accommodate each other’s needs according to the weather.
4. An environment promoting happy, active students which contributes not only to physical health but to intellectual and emotional flourishing.

### **Recommendations:**

None

### **Suggestions:**

The Visiting Team suggests the school:

1. Complete the excellent work begun in developing standards-based grading rubrics in PE and Health courses.

## SCIENCE

The school provides a mission–congruent educational program designed and implemented to promote the development of its students and in keeping with NWAIS core values. The program benefits from ongoing assessment and research, is supported by necessary resources and services, and provides for the assessment of student progress consistent with the school’s mission.

### **Observations:**

In keeping with the school mission, the Science Department offers students repeated opportunities to develop excellence in empirical skills and critical reasoning. The Visiting Team observed excellence flourishing in a relaxed and well–paced setting. Students behave as if science were the most natural thing to be doing in their day, and are clearly comfortable with asking questions, developing hypotheses, and collaborating to produce data. Often during a class, students demonstrated awareness of their own partial understanding and a willingness to try honestly to answer the question. Teachers astutely used those opportunities to reinforce the lesson. The mission of the school is well promoted by the Science Department in the development of curiosity and responsibility: the process of trying to grapple with and understand ideas and concepts clearly belongs to the students.

Teachers were observed to use a variety of instructional methods. Students were engaged, and about 40 to 50% of Upper School students were using their laptop to follow the lesson in one way or another. The Middle School teachers displayed varying levels of comfort with technology, but were uniformly strong in their emphasis on scientific method.

Student assessment is undergoing some revision, with attention to standards–based grading. Due in part to their work in this area, teachers have developed a common instructional language which was used consistently in a number of classes during the visit. Both Middle and Upper science teachers meet together regularly, and there is demonstrable collegiality.

Students are complimentary of the science classes. While students consider the courses challenging overall, they appreciate the willingness of teachers to work with them outside of class, and support their understanding in class. Parent and student feedback indicated the desire for better-defined science courses, available earlier in the students’ Upper School career. Specifically, parents and students wanted earlier access to Advanced Placement. Currently, the majority of Advanced Placement elective classes are offered in the twelfth. AP Physics is offered earlier in the eleventh grade, but only in conjunction with a required year-long course in Advanced Topics in Lab Science.

Most of the classes observed by the Visiting Team included a significant lab component. Although space is limited, teachers were well–prepared for the demands of each lab, and gracious in accommodating the needs of their colleagues in the shared space. The emphasis on “science as a process” was exceptional. Teachers used heterogeneous, thoughtful approaches to incorporate scientific method into the course experience.

### **Commendations:**

The Visiting Team commends the school for:

1. The intentionally measured pace of the learning experience, both in content and process. Students don’t appear rushed or frustrated, but are confident to ask questions, make

mistakes, and interact freely with teachers during the lesson.

2. A cohesive, enthusiastic and collegial faculty.
3. The use of common language - such as claim, evidence, reasoning - in guiding students through the science process.
4. The unified effort to develop a thorough scope and sequence of lab-based skills, in addition to consistent lab report grading rubrics.
5. The support of the board and administration in allocating funds to build or expand science lab space, and to provide adequate science resources.

**Recommendations:**

The Visiting Team recommends the school:

1. Consider how best to respond to student and parent feedback regarding the availability of AP classes earlier. Evaluate the current model and determine whether or not to change. If there is no change, consider how to better communicate the value of the current model. (School Program Standard, Indicator #4)

**Suggestions:**

The Visiting Team suggests the school:

1. As the demands of technology become increasingly complex, pursue consistent integration of technology into the Middle and Upper School science experience.

## SOCIAL STUDIES

The school provides a mission-congruent educational program designed and implemented to promote the development of its students and in keeping with NWAIS core values. The program benefits from ongoing assessment and research, is supported by necessary resources and services, and provides for the assessment of student progress consistent with the school's mission.

### **Observations:**

The Social Sciences Department in its program strives to develop students' educational skills (especially those in the areas of reading, writing, research, and critical/analytical thinking) and their knowledge of the human past. They offer a traditional sequence of courses through both the Middle and Upper Schools.

The Visiting Team observed a dedicated and enthusiastic faculty with a deep desire to see students learn. In the classroom, the Visiting Team witnessed teachers actively engaged with students. Teachers used a variety of methods, media, and technology to present the content for their courses. For instance, teachers that showed videos had notetaking guides to help focus students as they watched. Students used a combination of small group and class-wide discussions to analyze and synthesize material. The Visiting Team was also impressed with the consistent use of the target language throughout the courses.

The Visiting Team observed clear signs that department faculty members, who teach the same courses, actively work together to ensure continuity between their courses, both in terms of the content and skills, and in terms of the assessments they give to students. This coordination is both formal and informal in nature (e.g. teachers using common off periods to collaborate, or teachers simply checking in at the end of the school day). The teachers reported very collegial relationships with each other. The visiting observed a similar collegiality among the department's teachers and students.

The Visiting Team also noted that the department's faculty think deliberately about the issue of teaching content versus skills. At this point, members of the department have expressed a view that favors the emphasis of skills over content as a way to prepare students for future classwork. It is apparent though, that students may not see this emphasis on skills development. Some students reported that courses were more focused on content than skills, especially writing and research skills, skills that the English Department developed more intentionally. Students appreciated their teachers' passion for history, a passion that makes the classes interesting and engaging. Additionally, the Visiting Team noted that the department faculty actively worked to tie the history that they teach to either current events or local issues (something that the students appreciate).

The department is in a year of transition. The department saw its long-time Department Chair retire soon after the completion of its self-survey. This left the department unable to answer some questions about its portion of the self study. Most specifically, the department's self study did not answer the question about how the department assesses and improves its program. Additionally, the department does not have a current, written curriculum guide. The department was, however, able to find a replacement for the Chair within its existing faculty. The new Chair is making a conscious effort to provide the department's faculty with focus and goals as the department undergoes an extensive examination of its philosophy and the scope and sequence of the courses that it offers. The department expressed excitement to undertake and complete this long term

project. The department is also in the midst of actively working to implement new rubrics and assessment measures that it will implement across the entire department. The department Chair expressed her desire to complete a new curriculum guide for the department. Additionally, as the Department completes its internal examination, the department plans to work on improving its coordination with the English Department, especially at the Upper School Level. The level of coordination between the Social Studies and English Departments at the Middle School Level is already taking place by way of informal connections that have strengthened the coordination of curricula, helped by the close proximity of the two departments in the same building.

At this time, the department does not offer any Advanced Placement courses. It seems clear that the department would prefer not to offer these courses right now. This puts the department at odds with both the Administration and the other departments on campus. Students expressed a desire to have the option of taking AP-level Social Studies courses, such as AP United States History.

### **Commendations:**

The Visiting Team commends the department for:

1. The use of increased collaboration time to meet regularly both as teaching teams and a department. Teaching teams use the time to create more uniformity between faculty members teaching the same courses. The department is using its collaboration time to meet with the goal of revising the department's curriculum guide in terms of its scope and sequence.
1. A faculty that is energetic about its goal of teaching both content and skills to the student body at all levels of the program.
2. Making a genuine attempt to meaningfully integrate a variety of technology into the classroom environment.
3. Middle School History teachers who have meaningful dialogue with English teachers to help synchronize their curricula to help create synergy between the two departments.

### **Recommendations:**

The Visiting Team recommends the department:

1. Develop of a curriculum guide that fully describes the scope and sequence of the department's courses throughout the students' careers and consider how to create opportunities to coordinate with other departments when future opportunities for such collaboration arises. (School Program Standard, Indicators #6 & #7) See Major Recommendation #2
2. Evaluate the department's philosophy about and practice surrounding Advanced Placement in light of the overall School's philosophy. School Program Standard, Indicators #1 & #7)

### **Suggestions:**

The Visiting Team suggests the department:

1. Investigate ways that the department can increase the level of collaboration with the

Library in the areas of research and teaching students research skills, especially for more long-term research projects/assignments.

2. Continue to assess the department's elective program and the rotation of electives to offer both students and teachers a way to explore their intellectual curiosities and passions throughout the breadth of the Social Sciences.
3. Consider setting specific goals and dates for the accomplishment of tasks related to the department's "deep-dive" of its curriculum.

## **SCHOOL CULTURE**

The school has an intentional culture, which supports the school's mission and NWAIS' core value of free and open inquiry.

### **Observations:**

Overlake has an intentional and strong school culture that continues to thrive. From structural (schedule) to staffing changes, the school has purposefully sought to build and preserve this culture. Every constituent group was in full agreement that Overlake appropriately defines its culture by saying that, "Ours is a culture of achievement, a culture of involvement, and a culture of relationships." Student achievement is certainly an important aspect of the student culture, but one student said it well when he said that, "Teachers are not insisting on perfection but insisting on growth." With this emphasis on growth, students are encouraged to take healthy academic risks and stretch themselves to learn, and this was easily observed in the classrooms and in discussions with students. As for involvement, all constituencies commented on this central tenet to the Overlake culture. Students participate in many different activities and the school works hard to structure the various offerings in a way to maximize student involvement in multiple activities. Finally, the culture of relationships at Overlake is overt and a defining aspect of the school. The strength of the student-faculty relationships is evident when you step into a class, visit the student center, or listen to a student or faculty member talk about the school. Furthermore, this emphasis on relationships is evident as students look out for one another, attend their performances/games, and support each other in a way that allows everyone to be themselves. Students feel their voices are heard and listened to by the adults at Overlake. It appears to be a very welcoming and inclusive culture.

In assessing the school culture at Overlake, it is important to keep in mind the tremendous amount of change that has taken place over the last few years. After transitioning in a new head, the school has adopted many new initiatives over the past few years that have helped move the school forward, though also produced some disruption. Faculty and staff commented on some of the changes to their work culture and while some have found the pace and nature of change unsettling, many agree that the school is taking some steps that will make it a stronger institution. In all of these discussions with faculty and staff, it is clear that there is a deep commitment to the school.

### **Commendations:**

The Visiting Team commends the school for:

1. The commitment to and the quality of the faculty relationships with students.
2. Creating a safe community where students feel free to be themselves. Furthermore, because of this feeling of support, they express a willingness to try new things and stretch themselves.
3. The tremendous sense of trust in the Overlake community.
4. Cultivating the whole child and developing interests and talents in new areas. As one parent stated, "Overlake gets them to see themselves as someone other than who they were when they came in."

5. The tremendous sense of pride in Overlake expressed by parents, faculty, staff, and students.
6. The structural changes that allowed staff to become more involved in aspects of the school program (coaching, advising, leading trips, etc.) that facilitate staff relationships with faculty and students and allow the staff to more fully integrate into the school community.

**Recommendations:**

The Visiting Team recommends the school:

1. Evaluate the collective impact of the incredible growth (17 new faculty just last year) and multiple major initiatives in the last few years. Consider allowing time for the processing of existing initiatives before introducing new changes. (School Culture Standard, Indicator #1, School Program Standard, Indicators #3, 7)

**Suggestions:**

The Visiting Team suggests the school:

1. Continue to think about how to best to preserve the culture of involvement in the face of competing demands for students' limited discretionary time.
2. Continue to provide faculty with opportunities to discuss the changes to the academic program and better understand the rationale for proposed changes.



## COMMITMENT TO DIVERSITY

The school has created a program, culture, and inclusive community of students, families, trustees, faculty, and staff that reflects many perspectives and diverse backgrounds.

### **Observations:**

Throughout the visit, in observing the physical campus, school programming, and in speaking with the Overlake community, the Visiting Team noted the school's overt efforts to create a warm and inclusive community for all of its diverse constituents. Fliers in hallways and on classroom doors, multi-gender bathrooms, discussions in classrooms, and comments from many individuals all testified to the steps Overlake has taken to make diversity and inclusion visible on campus. Community members reported on the school's strength in fostering a strong sense of multiculturalism, highlighting their goal not just to achieve a diverse population but to emphasize the strengths and positive nature of a multicultural community. In addition, the school has created many positions and programs to formalize their efforts, including a Director of Diversity, a Diversity and Inclusion Committee, a Diversity Strategic Plan (approved by the Board), and several student clubs and school-wide events.

The student population is already ethnically diverse, but the Visiting Team noted that the school would like to increase representation from underrepresented populations, including from socioeconomically diverse groups. In addition, while the school has created a strong Diversity Hiring Plan, the school has not yet had a chance to see results from this effort, nor has it set in place some of the onboarding strategies that might help new employees feel more connected to and embedded in the school culture.

Around the school, the team observed that students are eager to have difficult conversations around diversity. Greater depth of knowledge amongst faculty and students, as well as achieving a critical mass of underrepresented populations in the student and faculty, will be necessary to make these conversations more meaningful and productive in the long run. With a new Director of Diversity in place this year, the school is well placed to begin this work and to continue to raise the level of diversity, awareness, and inclusion at the school.

### **Commendations:**

The Visiting Team commends the school for:

1. Creating a community that actively desires and seeks diversity and sees the value of this work.
2. Creating a visually inclusive and welcoming space for students of all types.
3. Developing a robust student involvement in diversity and inclusion work through the many student clubs that address these issues.
4. Creating several specific plans and structures to help oversee and implement the school's mission goals relating to diversity, including the creation of a Diversity Hiring Plan (part of the Diversity Strategic Plan) with the goal of increasing the diversity of the faculty.

**Recommendations:**

The Visiting Team recommends the school:

1. Consider reviewing overall budget allocation to financial aid to see if it is adequate to meet the diversity enrollment goals of the community. (Commitment to Diversity Standard, Indicator # 1) See Enrollment Management Recommendation #2.

**Suggestions:**

The Visiting Team suggests the school:

1. In order to support future benchmarks and progress, find ways to more consistently evaluate progress on meeting the school's strategic plan goals regarding diversity. Areas of focus would include accurately measuring and assessing what the community knows about diversity and inclusion, how the various members of the community define diversity, and what kinds of diversity already exist within the community.
2. Build on the seeds of the Diversity Hiring Plan as the opportunity arises, by consistently using the schedules and procedures outlined in the plan and coordinating with Human Resources to achieve these goals.
3. Consider developing, with Human Resources, a robust onboarding and mentoring program that specifically addresses the needs of minority hires in order to ensure retention of new hires that build the community's diversity.
4. Work with the ongoing curriculum "Dep-Dive" and consider developing specific learning outcomes regarding key concepts of diversity work, including micro-aggressions, privilege, the culture of whiteness, and cultural competency, as these issues fit into the school's Diversity Strategic Plan. Look for multiple points of connection across the curriculum and with the faculty, parent, and student populations to build grassroots knowledge around these topics in the school and to develop a broader understanding of diversity work on campus.

## INSTITUTIONAL LEADERSHIP

NWAIS schools are self-governing and self-supporting with an institutional leadership structure consisting of a governing board and a Head of School operating in a constructive partnership which provides for the effective oversight, planning, resource development, and day-to-day management adequate to sustain the school's mission and vision.

### **Observations:**

Overlake School's institutional leadership structure adheres to the requirements for nonprofit organizations in Washington. The Board is self-perpetuating, with Board members eligible to serve three consecutive three-year terms. No voting trustee can serve beyond three consecutive terms unless the trustee "has been off the Board for at least one year." As a result, the Board is comprised of several seasoned trustees who care deeply about the school and have proven their commitment to the school through years of dedicated service.

There are clear lines between the Board and Head of School in terms of the day-to-day operations of the school, which are carried out by the Head of School, and governance, which the Board fulfills. The relationship between the Board and the Head of School is strong and characterized by mutual respect and collaboration.

The Board has helped the school to successfully manage the transition to a new Head of School after a well-respected, long-serving Head of School. In addition, it is clear that the Board values the passion of the new Head of School and is committed to supporting him as the new strategic plan is implemented.

The Board meets regularly and works effectively within its Bylaws, which were last updated in May 2012 to reflect current good practices.

The Board and Head have worked collaboratively to develop a new strategic plan to set the future course for Overlake School. The Bylaws note that membership can be from 12 to 20 trustees. At the moment, there are 12 Board members. The Board is clearly committed to the long-term sustainability of Overlake. The Board has not conducted a formal self-evaluation for several years. For the first time this year, the Board will utilize an NAIS self-evaluation instrument to assess its work related to goals set at the start of the year.

### **Commendations:**

The Visiting Team commends the school for:

1. An effective partnership between the Board and the Head of School, which results in a smooth working relationship characterized by mutual respect and that furthers the fulfillment of the school's mission.
2. The dedication, passion and long-term commitment of the Trustees to the sustainability of Overlake.
3. The development of a visionary strategic plan, designed in partnership with the Head of School.

4. The commitment of the Board to robust fundraising, particularly as the school prepares to launch a campaign.

**Recommendations:**

The Visiting Team recommends the school:

1. Strengthen the process for the identification, cultivation, and recruitment of future trustees with a focus on the leadership needed to implement the strategic plan. Consider forming a governance committee to direct this process and to provide leadership in the orientation, mentoring, training, and evaluation of trustees. (Institutional Leadership Standard, Indicators #5 and #9) See Major Recommendation #4
2. Implement a self-evaluation tool for the Board. (Institutional Leadership Standard, Indicator #9)

**Suggestions:**

None

## FINANCE

The school practices sound financial management and its financial operations, resources, planning, and oversight are adequate to support the school's mission and vision and to sustain the school's long-term viability and stability.

### **Observations:**

The Overlake School's Finance Department is led by a Business Manager with 10 years of experience and a Controller with 11 years of experience. The remaining staff of the Business Office also has nearly 20 years of combined experience. The school operates at a surplus from operations, and has ample funds remaining to service its debt obligations and expand its reserves. The school currently has a healthy Endowment Fund, whose balance exceeds one year of expenses. Draws on the Endowment funds were at 2% and the suggested use of those funds is to expand the Financial Aid programs (Tuition, Dining Hall/School Store, Project Week).

The school has begun to restructure its summer Auxiliary Programs as both an outreach for students currently not enrolled at Overlake and enrichment for current students. Enrollment was higher than expected in 2015 and a slight profit was realized.

There has been a number of new faculty members that have joined the school recently. In conjunction with that, there appears to be some confusion among faculty with regard to the process for students to apply for financial assistance related to co-curricular activities.

The school is currently exploring the possibility of constructing a new Math/Science building, including the relocation of various administrative offices as early as FY 2018. Currently, there are two outstanding bond obligations and the Business Manager has described that there is not an appetite for additional debt financing for this new construction. As a result, discussions are necessary with the Board of Trustees, Head of School, Director of Development and the Business Manager to strategize how this construction would be financed and to put a timeline to such financing.

The school is currently using the services of an Owner's Representative to handle a Conditional Use Permit (CUP), covering a number of unresolved issues with King County. These issues include speed bumps on the main road to the school, drainage issues with a temporary parking lot, wetland protection areas, and access to temporary buildings. The resolution of these issues is important to the school as they undertake the aforementioned construction project, planned for FY 2018.

### **Commendations:**

The Visiting Team commends the school for:

1. The longevity in the tenure of the Business Manager, Controller, and Business Office Staff.
2. Managing annual cash surpluses while preserving capital and funding reserves.

**Recommendations:**

The Visiting Team recommends the school:

1. Consider expanding the use of the endowment fund or other sources of funding to grow the number of students on financial assistance in order to meet the school's mission of embracing diversity. (Finance Standard, Indicator # 1)
2. Continue to work with the Board and administrators to find ways to fund construction of a new Math/Science building beginning in FY 2018. (Finance Standard, Indicator # 2)
3. Consider re-educating faculty/staff on the procedure for applying for financial aid as it relates to co-curricular activities. Specifically, assure that all inquiries go through the Financial Aid office in order to protect the confidentiality of the families in need. (Finance Standard, Indicator # 6) See Enrollment Management #1 and Co-Curricular #1

**Suggestions:**

The Visiting Team suggests the school:

1. Utilize a separate plant, property, repair, replacement, special maintenance fund (PPRRSM) to segregate the costs of ongoing facility repairs apart from other reserve funds. This would allow adequate funds to be available when needed to continually serve the needs of facilities that continue to age.
2. Analyze the scope and purpose of the school's Auxiliary Programs to ensure that they
  - a. are profitable from an enrichment standpoint in order to fund the costs related to the outreach efforts,
  - b. align with the school's mission
  - c. are appropriately funded and
  - d. are properly staffed.

## ADMINISTRATION

The school has an effective administration that enables the school to implement the school program in accordance with its mission, to carry out school policy, and to comply with applicable laws and regulations.

### **Observations:**

The Overlake School has a strong and dedicated Administrative team. The Administrative team has aligned under the new leadership of the Head of School to begin to move forward on several strategic initiatives. The team is comprised of the Upper School Head, the Middle School Head, the Dean of Students, the Assistant to the Head of School, the Director of Admissions and Financial Aid, the Business Manager, the Director of Communications, the Director of Counseling and Advising, the Director of Technology, the Director of Diversity, and the Director of Development. The team holds an annual two-day retreat to create the path of work for school initiatives and to develop alignment. In addition, the team meets once a week to review school issues within and across different departments. The team views these meetings as collaborative and productive, and observed a high degree of collegiality.

The size and function of the administrative staff appears appropriate and in line with the school size in the operational areas of the school, but on the lean side in the academic leadership area. Several faculty members mentioned that more academic leadership is needed to move the school forward on the various academic initiatives. Capable support staff brings passion and purpose to their daily work and many speak to the strong sense of community as one of the defining characteristics of working at Overlake.

The reorganization of the Communications and Development departments has increased the capacity of each department to carry forward its work. Additionally, the newly constituted Advancement Team made up of the Directors of Communication, Development, and Admissions has strengthened the school's commitment to marketing and outreach alignment and efforts.

The restructuring of the teaching load with department chairs moving to three sections has created opportunity for increased department leadership.

There is widespread enthusiasm and support for the new position of Instructional Coach, who has helped to "provide feedback on all aspects of their work."

The evaluation process for non-teaching staff is clear and well-articulated. However, evaluation of senior administrators should be revamped, and given the increase in faculty, there is a need to review how and when evaluation of faculty members occurs. Administrative resources are limited for the consistent evaluation of all faculty members.

### **Commendations:**

The Visiting Team commends the school for:

1. A senior administrators and staff who are dedicated to a student-centered approach and committed to the school's mission.
2. The implementation of the position of Instructional Coach that has been beneficial to teacher growth.

3. Restructuring the teaching load for department chairs to allow for increased academic leadership.
4. The reorganization of the Communications and Development Departments to increase efficiency and functionality.
5. The creation of an Advancement Team to strengthen teamwork and coordination of Communications, Development, and Admissions.

**Recommendations:**

The Visiting Team recommends the school:

1. Evaluate the school's readiness in regards to staffing to launch a large Capital Campaign within the next year. (Administration Standard, Indicator #2) See Institutional Advancement Recommendation #1
2. Review the level of staffing on the academic administrative team to assess if it is sufficient to carry out the significant programmatic work underway. (Administration Standard Indicator #2) See Major Recommendation #3
3. Develop a more formal evaluation process for senior administrators. (Administration Standard) See Human Resources Recommendation #2
4. Review the current process for faculty evaluation in terms of consistency of implementation and explore other models of evaluation that might better serve the school. (Administration Standard) See Human Resources Recommendation #2



## INSTITUTIONAL ADVANCEMENT

The school has an institutional advancement program that sufficiently supports the mission and program of the school.

### **Observations:**

The Institutional Advancement leadership team is made up of the Director of Admissions, Director of Development and Director of Communications at Overlake School.

Overlake School has reorganized the structure of the Development Department and Communications Department in the last year in order to more adequately meet the needs of the school with measurable results. The Development Department is comprised of Director, Assistant Director of Development and Alumni Engagement, Annual Giving & Events Manager and the Donor Records & Stewardship Manager. The Development Director, Communications Director, and Director of Admission are part of the Administrative Team that meets weekly. The Development Department is under new leadership. The new leadership in the Development Department has had a measurable and positive impact on the development campaigns in a very short time. A dedicated effort has been put toward building relationships with alumni and fostering goodwill among the alumni community with the support and encouragement of the Board of Trustees. The Board of Trustees exhibited a strong appreciation for the work done thus far this school year in the area of development.

The Communications Department is comprised of the Director, Associate, Webmaster and Receptionist. The full time Associate is shared evenly by both Development and Communications. The Communications Department has made creative and professional collateral for internal and external marketing and fundraising efforts. A new focus has been placed on increasing the school's social media presence. In addition, the Communications Department is in the middle of doing a brand awareness survey with the local community in order to obtain a true understanding of how the school is perceived. The Communications Department is intentionally increasing the formality of its practices and methods in order to increase the sophistication of the brand. The Communications Department indicated that their directive is to make the focus on raising external brand awareness a priority.

### **Commendations:**

The Visiting Team commends the school for:

1. A successful transition to a new structure for Development and Communications Departments with new leadership.
2. Increasing the Annual Fund participation to 94% and significantly increasing the actual funds raised.
3. Creating the Alumni Board and hiring an alumnus with a specific goal of building relationships with alumni.
4. Conducting a comprehensive brand awareness survey.
5. Completing an emergency communications plan.

**Recommendations:**

The Visiting Team recommends the school:

1. Evaluate the school's readiness in regards to staffing, resources & donor base to launch a large Capital Campaign within the next year. (Institutional Advancement Standard, Indicator # 2) See Administration Recommendation #1

**Suggestions:**

The Visiting Team suggests the school:

1. Review the practices of the entire Advancement Team to interact constructively with faculty, students and parents in order to meet the mission of fostering community.

## ENROLLMENT MANAGEMENT

The school has defined what it means by a mission appropriate student and has an enrollment management program that sufficiently supports the mission and program of the school.

### **Observations:**

The Overlake School has a robust Admissions Office. Although the Director of Admissions is relatively new, the team's cohesiveness gives visitors a sense of support and program competency. The Admissions Team is involved with and knowledgeable of what is occurring within the school community. This gives the Admissions Team the capacity to speak first-hand about the highlights of Overlake. There is a commitment to have a wide base of ambassadors to serve in the enrollment process giving prospective families an opportunity to connect in a meaningful way with the Overlake community.

The online application process is refined and effective. There have been positive changes in this process since the last accreditation and students are assessed in a well-rounded way. However, there is still an emphasis on standardized test scores with minimal data supporting the effectiveness of Overlake students' outcomes based on test scores. The Admissions Committee plays a large part in reviewing other aspects of the application and their input is invaluable. The time and effort the Admissions Director gives to training this committee is important to continue the effectiveness of the committee admitting mission appropriate students.

Enrollment Management is enhanced by a strong Advancement Team consisting of the Admissions Director, Communications Director, and Development Director. This team has recently created new collateral materials that have a consistent brand story. This team is also in the middle of conducting a Brand Awareness and Perceptions Survey of the broad community outside of the Overlake community.

The Admissions Director is also working collaboratively with the Director of Diversity to do outreach in low income and underrepresented populations. There is a strong sense of commitment within the Admissions Team to diversify the student body at Overlake. In order to fund this commitment to higher levels of financial aid the school has a strategic plan to begin a major Capital Campaign to grow their endowment. However, until this occurs, the Financial Aid budget is limited to a lower than average level for most independent schools (7.5%). The projection for the year is to be over budget.

When students are admitted on financial aid there is not a clearly communicated outline of additional expenses families can expect. Although some of these expenses are covered by financial aid, others are not, and students/families have to request additional funding. There has been an effort to reach out to those families when there are new expenses. This was done for the implementation of Bring Your Own Device. Any student who could not afford their own device was given one by the school.

The Enrollment Management of Overlake is effective at reaching enrollment capacity, deliberately selecting mission appropriate students, maintaining low attrition across all grade levels, and providing financial assistance to most qualified and mission appropriate students who are aware of Overlake and complete the application process. However, the number of students applying to Overlake from underrepresented populations is low.

**Commendations:**

The Visiting Team commends the school for:

1. A strong team who functions collaboratively to manage and administer a thorough enrollment process which is continually reviewed and updated as needed.
2. A clear and consistent understanding of what defines a mission appropriate student.
3. The new collateral that communicates a clear message relating to the mission and has consistent brand messaging.
4. Communication among administration around enrollment issues that is open and honest, creating a work environment that reflects the school's commitment to foster compassionate community.
5. Ongoing development and training for members of the community involved in the admissions process such as Parent Ambassadors and the Admissions Committee (consisting of both faculty and administration).
6. Full enrollment to their desired number of students.

**Recommendations:**

The Visiting Team recommends the school:

1. Review of all extra costs necessary to participate in student life at Overlake and then develop and/or communicate the systematic process for handling student financial aid needs that will allow them to fully participate in all activities. (Enrollment Management Standard, Indicator # 3) See Co-Curricular Recommendation #1 and Finance Recommendation #4
2. Consider reviewing overall budget allocation to financial aid to see if it is adequate to meet the diversity enrollment goals of the community. (Enrollment Management Standard, Indicator # 2) See Diversity Recommendation #1

**Suggestions:**

The Visiting Team suggests the school:

1. Consider a broad validity study of standardized testing in order to determine the effectiveness of the SSAT as a benchmark for student success at Overlake.
1. Consider implementing a survey to the community to get more accurate data on student body diversity especially in the area of race. This would also be useful when reporting to DASL.

## HUMAN RESOURCES

The school has policies and practices in place to ensure that employees are well qualified, adequately compensated, appropriately supported through effective evaluation and strong professional development, and are sufficient in number to support the school's efforts to achieve its mission.

### **Observations:**

The Human Resources functions of The Overlake School reside in three areas. First, the Business Office manages the logistical end of the Human Resources functions (e.g. compensation, benefits, contracts, etc.). These functions are handled mostly by the School's Controller. Second, the Administrative Team and the Department Chairs handle the hiring, professional development, and evaluations of the faculty (the Department Chairs are not a formal part of the faculty evaluation process). Third, the hiring and evaluation of the staff is handled by each section or department in coordination with the Business Office.

Given the longevity of the Business Office's leadership, it is no surprise to see that they have good systems in place to handle the logistical end of the School's Human Resources functions. There is a very clear, transparent pay chart for the faculty that gives fair consideration to a teacher's level of education and years of teaching experience. It is also clear that the Business Office, in coordination with the School's Personnel Committee have made good use of the Human Resources legal knowledge that resides within members of the wider Overlake community (i.e. parents with HR legal experience). This has made up for the Business Office's lack of a trained HR professional to help manage the School's compensation and benefits programs while also staying abreast of changes in applicable HR laws.

The Overlake School has recently gone through a significant increase in the size of its faculty. With normal attrition and the School's conscious decision to lower the teaching requirement from five classes to four, the School brought in seventeen new teachers. It is clear that the School's Business Office worked well with the individual departments and the Administration to get through that process. It should be noted though that the school did not use this expansion of its faculty to address some of the School's diversity concerns. Unfortunately, the school was in the midst of identifying its diversity needs and strategy while it was recruiting, interviewing, and hiring its expanded faculty.

Given the increase in faculty size, the Administration has been challenged to continue to implement the faculty evaluation system. Currently, evaluations are not tied to the annual renewal of teachers' contracts. In the past, the School had a system that only evaluated new faculty. In recent years, the School implemented a system that evaluates new teachers in their first two years and every three years after that. The Division Heads are responsible for completing the evaluations for the faculty. This evaluation is benchmarked to the School's "Expectations of Good Teaching" document that is found in the Employee's Handbook. This document is over twenty years old. This system includes meetings between the teachers and their Division Head; formal classroom visits, with feedback from the Division Head; a formal student survey of the teacher; and a final meeting to review the findings of that process. This system has created a considerable amount of work for the Division Heads, especially in the last two years with the School's expansion of its faculty by 17 teachers.

As the Visiting Team talked to members of the faculty, they expressed uncertainty about the school's evaluation system, especially in terms of the timing and sequence of the evaluation

system. Teachers who were newer to the school expressed a better understanding of how the evaluation system works than faculty members who had worked for the school longer. It is also apparent that the Division Heads have had a hard time keeping up with the evaluations and the steps for sharing those evaluations with the teachers. Some teachers did not get the results of their evaluations until the following school year, and a number of more senior teachers are overdue for an evaluation under the current system.

Members of the faculty expressed their feelings that the evaluations are fair. That said, they did not seem to understand the overall benefit of the evaluations, especially given the amount of time between evaluations for some faculty members. If the School's purpose for the evaluations is growth, the faculty interviewed did not seem to see the evaluation system as being a tool for growth. Instead, they expressed their opinion that they gained greater value from the time spent with the school's new Instructional Coach and the increased collaboration time between colleagues.

Finally, it should be noted that the Administration Team should revamp the current evaluation system along the lines of what was done for the staff.

### **Commendations:**

The Visiting Team commends the school for:

1. Having done a good job of managing the compensation systems for its employees. They have a thorough and transparent compensation program in place.
2. Bringing in an Instructional Coach that has reinvigorated and strengthened the School's internal Professional Development program.
3. Having the "Teacher in Difficulty" program, which gives the school a way to identify teachers in a serious state of need and giving those teachers a chance to rehabilitate themselves.
4. Having a faculty mentorship program that provides motivated and trained faculty members to help guide and mentor new faculty members during their first semester.

### **Recommendations:**

The Visiting Team recommends the school:

1. Determine the resources needed to manage the school's growing HR needs in the area of employee benefits. (Human Resources Standard, Indicator #4)
2. Review the evaluation system for the faculty and administrators in light of the sustainability of the program as it currently stands. The school should consider, as part of this review, an evaluation of its "Expectations of Good Teaching" document. (Human Resources Standard, Indicator #2) See Administration Recommendations #3 and #4
3. Communicate the evaluation standards to the faculty to ensure that they understand the goals and the timelines for the evaluation process. (Human Resources Standard, Indicator #2)

**Suggestions:**

The Visiting Team suggests the school:

1. Continue to work with the School's Director of Diversity to define the school's diversity needs and use the hiring process to meet those needs as outlined in the School's Diversity Hiring Plan.
2. Evaluate the need to revise the faculty evaluation process to find ways to get more individuals involved in the process.
3. Consider finding more time for teachers who have completed off-campus Professional Development to share those experiences with their colleagues.

## SCHOOL PLANT

The school's plant supports the mission and program of the school and is maintained over time in a manner that is sustainable.

### **Observations:**

Overlake School has fulfilled the goals of the original master plan in recent years, which has resulted in a beautiful 73-acre campus comprising of functional classroom spaces, welcoming common areas, a connection with the outdoors, and a sense of community. The culture of the campus is much like a small college campus. There are 17 buildings on campus including classrooms, arts center, campus center, athletic facilities, administrative offices, private residences, maintenance storage and fields. There are several parking areas, some with restricted use such as senior parking, faculty parking and visitor parking. Parking is at a premium during school events. A portable classroom has been brought in this year in an effort to alleviate space constraints in the Math–Science building; however, approval for use from the county is still pending. There are over two miles of trails on campus that are used frequently as direct routes from upper campus to lower fields. The campus is well–appointed in order to deliberately foster trust and responsibility among students to manage their daily responsibilities independently. In grades 7 and above, students do not have lockers and use various areas on campus to manage their personal items.

The campus has approximately 21 acres of designated wetlands and the ability to build out further is dependent on the appropriate land use management of the property. A privately owned residential property is located in the middle of the school's property and adjacent to the Head of School's residence. Overlake School currently holds a first right of refusal to purchase that property should it come up for sale.

The dedicated fifth and sixth grade building fosters an intentional space for younger students while also allowing seventh and eighth grade students to adopt more independence as they move from space to space on campus. Mingling of all grades in common areas builds community spirit.

Despite the size of the campus, there is a feeling of having reached maximum comfortable capacity and, in the case of the Math–Science Building, have exceeded the capacity. It is clear that the need to add classroom space for Math and Science is a necessity. While many buildings are relatively new, the commitment to maintaining a dedicated PPRSM reserve account is good planning for on-going maintenance and upkeep.

The school has submitted a Conditional Use Permit (CUP) application to King County to solve some school plant issues including some rectifying requirements made by King County (speed bumps and lower parking lot) as well as planning for future classroom space growth. The use of the Math–Science portable is restricted until the CUP has been approved.

The athletic facilities appear to be adequate for the demands of the curricular and after school programs; however, the field house is of an age where maintenance is required annually. The school plans to convert two of the four fields to turf because they are currently are not usable during wetter seasons. The Facilities & Grounds Department is currently comprised of the Director of Facilities and five maintenance workers, of which one position is currently vacant. The Director specifically assigned roles that each maintenance worker specializes in solely: Customer Service, HVAC, Electrical, Grounds and General Maintenance. The Facilities and Grounds Department maintains a minimum of one on–call person (usually two) on campus 24 hours per day, seven days



a week as the Director lives in one of the campus residences. The maintenance person shifts are staggered so the campus is staffed with a maintenance person from 6 am to 10:30 pm Monday through Saturday. Custodial Services and Lawn Services are contracted through outside vendors.

Requests for maintenance work are sent to the Facilities & Grounds Department through an online tool called School Dude, which generate specific emails to the appropriate maintenance person. The school has included creating more parking spaces in the current CUP application. The school is in the process of converting lighting systems to motion-detected LED systems. The school has recently added exterior lighting to several parking areas and exterior areas around the athletic buildings.

The Director of Facilities indicated that the number of community events outside of the school day that require a maintenance person to be present has increased from 160 to 245 in the last year. This increase has stretched department resources.

The Transportation Department is led by the Transportation Coordinator who schedules all school transportation needs and drivers. A fleet of six 14-passenger buses plus three 20-passenger buses are maintained for home-to-school and school-to-home transportation as well as activity/athletic transportation. In addition, several home-to-school and school-to-home routes are contracted out to Harlow bus service, who use their own drivers and buses. The youngest bus in the fleet is four years old and the average current mileage is 68,000 miles. Requests for transportation are communicated through email to the Transportation Coordinator.

**Commendations:**

The Visiting Team commends the school for:

1. A strong commitment to building and maintaining a physical plant that adequately serves the needs of students and teachers.
2. Recognizing and seeking to provide interim solutions for current space constraints.
3. Dedicated and well-funded reserves.

**Recommendations:**

None

**Suggestions:**

The Visiting Team suggests the school:

1. Evaluate if the school Transportation Department has adequate and properly licensed drivers to meet the growing sizes of athletic teams.

## HEALTH AND SAFETY

The school has established and effectively implemented policies and procedures that promote a safe and healthy school environment consistent with the mission of the school.

### **Observations:**

The Visiting Team observed a healthy and safe environment with excellent protocols, firmly established and regularly rehearsed. The Risk Management Committee appears to have put great time and forethought into minimizing risk in every area of student life. Teachers report feeling sufficiently trained in CPR/AED and First Aid, and students communicate knowledge of, and confidence in, emergency procedures.

There is a clear balance of adult and student responsibilities with regard to the health needs of students. For example, homeroom advisors are given data on student allergies, but during an observed club time it was the students themselves who assessed the snack to ensure no one was harmed in the eating. The self-advocacy of the students is a result of conscious leadership on the part of faculty, staff, and administration.

Overlake operates an extraordinary array of student trips, and the degree of attention to safety protocols on these trips, whether local or international, is impressive. Students are well-protected and staff well-prepared for eventualities.

Students clearly feel at home and safe on the spacious Overlake campus, but teachers reported concern for student safety after school hours. Although there is a plan for supervision during non-class times, there appears to be no centralized oversight of students moving about the campus later in the afternoon and early evening.

The Visiting Team recognizes an increasingly complex world of physical safety and security, and applauds the school for the breadth of its approach to these issues. The remote location of the school and the spread-out nature of the campus led to Team concerns about the depth of security in place.

### **Commendations:**

The Visiting Team commends the school for:

1. The forethought and intentionality of the Risk Management Team, particularly in seeking outside audits to provide a safe and healthy experience for Overlake students.
2. The development of mature and responsible student participation in managing their own safe choices.
3. The ubiquity of the AED machines - in every building and on the field at each home athletics event.
4. A comprehensive plan of communication during emergency drills and school trips.
5. The development of a Crisis Communication Plan establishing policy and procedure for communicating to outside organizations in event of a crisis.

**Recommendations:**

The Visiting Team recommends the school:

1. Investigate ways to improve campus security measures, for example, assessing access to campus and continuing to increase lighting in all outdoor spaces. (Health and Safety Standard, Indicator # 1)
2. Increase oversight of students and attention to their safety on campus after 3 p.m. (Health and Safety Standard, Indicator #3)

**Suggestions:**

The Visiting Team suggests the school:

none