

The Overlake School

SELF STUDY

Our mission:

- Inspire Excellence
- Develop Intellectual Curiosity
- Teach Responsibility
- Embrace Diversity
- Foster a Compassionate Community

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 the 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%

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Introduction

Starting from its humble beginnings in the Redmond Manor in 1967, The Overlake School was founded 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.” That vision is alive and well today and is the experience of current Overlake students.

In 1972 the school moved from a rented facility in Bellevue to its current location, a 75 acre former working farm located off Redmond Road. As a young school the focus was on admissions, upgrading facilities on limited budgets and creating a culture based on the vision of the founders. The school was fortunate to have a highly dedicated faculty, staff, administration and board who believed in the school and its mission which helped the young school through the 1980’s and early 90’s.

In the 90’s several leadership changes created significant challenges at the school. Fortunately, the Board hired a head of school, Frank Grijalva, who saw the enormous potential of the school and was ready to do the hard work necessary with the community to realize its potential.

From 1999 to 2011 the school focused on creating a campus that matched the strong and engaged faculty and student body. During this time, the community saw a new Humanities building, Technology and Languages Center, Campus Center, Gym, and Front Office grace the campus. The new construction culminated in 2011 with the completion of the 5th and 6th Grade Center, aptly named after Grijalva.

Current visitors to the campus comment on how well the facilities complement the impressive natural beauty of the surrounding environment. The glowing white buildings set off by the wonderful green of the surrounding forest mimic the feel of being on a small college campus. But more importantly than the outside aesthetic, is the work that happens inside the classrooms, on the stage, on the courts, and on the playing fields.

At Overlake, students are challenged to think deeply and to test assumptions all within an environment that is safe and supportive. From as early as 5th grade, students are asked to take on the responsibility for their own learning. They are taught through the years how to manage relationships with faculty in order to prepare them for college life and beyond. It is these relationships between faculty and students which remain at the center of the Overlake culture.

As the school prepares for its 50th anniversary the focus has turned from facilities to school programming. In 2013 the school adopted Canvas as its online learning management system; coordinating the student's classwork more directly to the faculty's curriculum. In the 2015-16 school year technology support continues as Overlake begins a Bring Your Own Device (BYOD) initiative for all students.

Beyond technology support, seeing the need to create more time for faculty to collaborate and for departments to engage in a curriculum deep dive, Overlake recently reduced the teaching load of all faculty from a five course load to four. Department chairs have seen their course load reduced from four to three classes, in order to create more time to oversee each department's deep dive into the curriculum. The school also hired a full-time instructional coach to work with teachers over extended periods of time in a non-evaluative supportive manner with the specific goal to enhance the teaching of an already strong faculty.

These programming changes prompted the school to hire nine new faculty members to support the new course load and schedule, as well as create additional office space for faculty to collaborate. These changes were fully implemented at the start of the 2014-15 school year.

Many things have change at Overlake since 1967 but what remains central to who we are is the deep and long lasting respectful relationships that are established and nurtured between our faculty and our students. If Charles Clarke came on campus today, he would be very proud that his vision of Overlake has become a reality.

NWAIS Self Study Process

Section Writers: Meghan Waddle, Accreditation Chair, Matt Horvat, Head of School, Margaret Lynch, Assistant to the Head of School

Date Completed: June 2015

STANDARD: 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.

The school has conducted its self study process in a way that assures that the responses to each section are the result of perspectives of people from both within and outside of the area being reviewed. Describe how the school organized its self study process and committees so as to provide for the inclusion of people from both within and outside of the area being reviewed.

On October 23rd, 2013, The Overlake School Board of Trustees affirmed the school's mission: Inspire excellence, Develop intellectual curiosity, Teach responsibility, Embrace diversity and Foster a compassionate community. This affirmation was the launch of the school's "deep drive" into an investigative Self Study process.

In November 2013, the Head of School appointed Meghan Waddle as the Accreditation Chair for the 2014-2015 reaccreditation cycle. That fall Meghan mapped out a two-year plan with feedback from the Administrative Team and department heads on the process and time frame of the Self Study. The goal was to ensure that the work was process-oriented, mission driven, and encompassed all stakeholders at the school. Additionally, the school wanted to ensure that the accreditation process did not overwhelm any one department or individual. Below are several areas that were noteworthy during the process:

- The Head of School and Accreditation Chair appointed a Steering Committee consisting of administrators, faculty and staff, to read, review, and approve each report, to develop surveys, and to be community ambassadors for the Self Study process
- The majority of non-academic standards were completed in the spring of 2014
- The School Program section of the draft was completed in the 2014- 2015 school year
- The Accreditation Chair assigned a Resident Outsider to each non-governance committee to assure the results were group-oriented, diverse and objective
- Questions 1-8, and 13 of the School Program standard of the draft were subdivided and worked on by the Middle and Upper School Heads. These sections included faculty feedback and insight collected during faculty meetings
- The Head of School and Accreditation Chair appointed parent volunteers and Board Members to the following committees: Mission, School Plant, School Culture, Finance, Commitment to Diversity, Institutional Advancement, Health & Safety, and Human Resources
- The Accreditation Chair appointed students to the School Culture committee

- Finally the Head of School wanted to ensure that faculty members and the majority of staff members served on one or more committees

Over the course of two years the Head of School, Accreditation Chair, and Assistant to the Head shepherded the process by organizing committees, communicating group process expectations, sitting in on committee meetings, proofing drafts, administering surveys, and coordinating Steering Committee review sessions. The HOS and Accreditation Chair reported progress to the community on a regular basis during All School Meetings, Board Meetings and PFSA Meetings. The majority of Self Study work was completed during the school day during department collaboration time; professional development days were also used during the two year cycle. Overall the Self Study ran smoothly because of the familiarity faculty and staff had with previous accreditation cycles.

Describe how the Board participated in the school’s self study process.

The Board of Directors at The Overlake School participated in the school’s self study process in the following ways:

- Affirmed the school’s mission in October of 2013
- Co-wrote the Institutional Leadership section of the self study with the Head of School
- Completed stakeholder-specific accreditation surveys
- Acted as community ambassadors of the Self Study process
- Reviewed stakeholder feedback surveys with the Head of School for reflection, discussion, and growth
- One or more Board Members served on the following standard specific committees: Mission, School Plant, School Culture, Finance, Commitment to Diversity, Institutional Advancement, Health & Safety and Human Resources

The school has surveyed its faculty and staff, students, parents, and, if appropriate, alumni within three years of its accreditation visit for the purpose of reflection and continual improvement.

What general topics were selected in the surveys and why?

Our constituent surveys focused largely on Mission, School Culture/Climate, Quality of School Program, Support for Student Learning, and Community Relationships (parent and school, student and teacher, staff and admin team). All constituents were also asked to name the school’s strengths, areas of improvement, and the actions they would like to see the school pursue in the future. These topics were selected for the following reasons: to provide continual school improvement, ensure that future action is mission driven, and to give the school a snap shot of where the community stands after an introduction of a new Head of School in 2012.

What constituent groups were selected to participate in the surveys and why?

Parents, students, staff, and Board members were surveyed during the accreditation cycle. We believed these constituents would be a strong, core sample group to determine if the school is fulfilling its mission.

Please note, we did not formally survey our faculty during the 2014-2015 accreditation cycle. Changing the definition of full-time employment from a 5-course load to a 4-course load increased faculty staffing by 20%. In addition to this, with assessment restructuring, Curriculum and Scope & Sequence modifications, we believed it would be an inopportune time to survey this group. The school does plan to survey its faculty at the start of the 2015-16 school year.

What are the school's strengths and weaknesses from the perspective of constituents surveyed? Comment on any themes or findings from these surveys and how you are using this information to continually improve your school.

Below are the common themes in our survey findings:

Strengths

- A positive school culture and environment are evident; the school fosters students growth in all aspects (academic, intellectual, and emotional)
- Boys and girls have equal opportunities for success in academics, arts, athletics, and other co-curricular programs
- Quality of teaching is strong, with great teachers providing individual attention, academic rigor, high expectations and emphasizing a “whole child” development theory in their teaching practices

Areas for Growth

- Continued growth needs to be made on creating an economically and racially diverse environment
- Continued growth should focus on internal and external communications and marketing (school to parent, teacher to parent, Overlake to community at large, interdepartmental communication, etc.)
- Staff need to have more opportunities to work directly with students
- Homework load per department needs to be assessed (too much/too little, busy work or for student's intellectual development)

The information gleaned from survey results has been reviewed, discussed, and reflected on by the Board of Trustees, Head of School, the Administrative Team, and Department Heads. The majority of these common themes aligned with the strengths and areas of growth that were discussed in standard specific sections of the report. This alignment gives us a clear understanding that our section writers focused on the needs of our greater Overlake community as we continue to improve the school for future success.

The school has addressed all major recommendations from its previous accreditation visit (only for schools going through re-accreditation). Has the school addressed the major recommendations from the last accreditation visiting report? If yes, provide a brief summary of the key accomplishments in addressing the major recommendations. If not, what aspects of the major recommendations have not yet been addressed?

The school has addressed each of the major recommendations from the 2007 Visiting Team Report (October 14th-17th, 2007). Below is a summary of the key accomplishments in reference to each major recommendation:

Conduct a comprehensive review of the marketing and communications program in an attempt to unify the overall marketing message

- In 2008 and again in 2013, Overlake hired Hansen Belyea, a Seattle design, marketing, and public relations firm to do a comprehensive review of Overlake's communications and marketing strategy (see Institutional Advancement section of the Self Study for additional information).
 - The end results of these consultations were enhanced brand platforms
 - During the 2008-2009 school year, the school's print communication was re-designed and the school's website was rebuilt and launched
- In 2014, the Development/Communications Department was split into a Development office and a Communications office. The rapid growth of communication tools, the desire of all constituencies to have more frequent, timely, and detailed information and the retirement of the longtime Director of Development & Community Relations all precipitated this change.
- In the fall of 2014, a Director of Communications was hired and appointed to the Administrative Team
- In 2014, an Advancement Team made up of the Director of Communications, Director of Admissions, and Director of Development was formed to ensure that the three departments worked in concert with one another and to ensure that the school message was clear and consistent.
- In 2015, the Director of Communications performed a school-wide communications audit

Clarification on the philosophical foundation of the Middle School Program

- A new facility was built to house the 5th and 6th grades
- Cohesive faculty teams were created in the 5th and 6th grade
- With the move from five classes to four, the school had the opportunity to create 7th and 8th grade faculty teams
- A greater focus on the Middle School advisory program occurred
- There is now a focus to ensure that Middle School teaching experience is considered in the hiring process

Review of the administrative structure and staffing needs

The Administrative Team and Board of Trustees strive to continually assess the adequacy of the administrative structure and staffing to ensure that the school continues to meet its mission. The following positions have been added since the 2007 Visiting Team's review to help with the ongoing demands of the school:

- Admissions Assistant - to assist the growing demands of the Admissions Department
- Project Week Coordinator - to assist teachers and to facilitate planning for Project Week

- Grade Level Advisory Team Leaders - to assist in the development of the advisory program
- Grade Level Deans - to assist in the development of the academic program
- Athletic Trainer - to support and maintain the physical integrity of the program and the safety of the athletes
- Athletic Department Assistant - to assist in the growing demands of the Athletic Program
- College & Personal Counseling - addition of a Learning Specialist, College Counselor, School Counselor, and Counseling Assistant to meet the growing academic, physical, social, and emotional needs of our students
- Director of Communications – to increase effective, real-time communication to stakeholders and improve our marketing band width
- Instructional Coach – to provide non-evaluative professional development support to faculty
- Technology Mentor – to provide faculty a liaison to integrate technology into the school program on a daily basis

Meeting Overlake's over growing facility needs

- Since the 2007 Visit Team review, the following buildings have been replaced or remodeled through various capital campaigns
 - William C. Armstrong Humanities Building (completed in 2009) – houses English and History Departments for grades 7-12
 - Technology and Language Center (completed in 2009) – houses the Student Center, Computer Labs, and the Language Department
 - Francisco J. Grijalva Fifth & Sixth Grade Center (completed in 2011) – houses 5th/6th grade and the Head of School office
 - Remodel of the Library (completed in the summer of 2015)
- The Math & Science Building, our oldest instructional building, is at capacity. The 2015 Strategic Plan (Pursuit of Academic Excellence: Overlake at Fifty) addresses space issues in this building and explains the strategic plan to redevelop the existing Math & Science Building into a dedicated Science building and constructing a new classroom building to house math and computer science.

What were the school's overall strengths in conducting the self study process?

- Strong board, parent, and student participation (high survey completion rates)
- The school's decision to appoint a Steering Committee of administrators, faculty and staff members to review, edit and approve each submission
- Seasoned staff and faculty brought a sense of knowledge, confidence, and calm to the process based on their past experience with accreditation cycles

What areas of growth and/or recommendations would the school make regarding the way in which it conducted the self study process?

- Create and mandate a style guide to minimize hours spent on editing and reformatting
 - Universal use of an online platform for submissions, edits, and reviews
- Map out the accreditation process concurrently with our annual "calendar summit" to better use professional development days and staff/faculty collaboration time

- Change the mindset of the community regarding self study – move from added work to professional opportunity to learn about the school.

Documents Provided:

- 2007 Visiting Team Report
- 2007 Response Report
- NWAIS Annual Reports (last five years)
- Summary Data from Student, Parent, Staff Surveys
- 2015 Strategic Plan - Pursuit of Academic Excellence: Overlake at Fifty

School Mission

Section Writers: Meghan Waddle, Accreditation Chair & Matt Horvat, Head of School

Date Completed: January 2014

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

The school and its Board have reviewed its mission as the starting point in the self study process. Describe the way in which the mission statement was used as the starting point for the self study.

The Board of Trustees of The Overlake School reaffirmed the school's mission on October 23rd, 2013. As the school launched the self study process in the fall of 2013, each committee was asked to first reflect on the school's mission as it related to their section of the report. Additionally the Head of School and Accreditation Chair selected Steering Committee members that would reflect the school's mission in their discussions and decision making in reference to this self study process.

The school has a clear mission that is effectively communicated.

The Overlake School's Mission Statement: *Inspire excellence, Develop intellectual curiosity, Teach responsibility, Embrace diversity and Foster a compassionate community*

When was it last formulated? By whom? Through what process? If changes were made, what were they and what brought about these changes?

Our current mission statement was adopted in May of 1996 by the Board of Trustees. The mission statement was amended in December 2003 when the additional line "Embrace Diversity" was added. This addition came after a proposal from the Board's Diversity Committee. The original mission statement was developed during a three year process and was created by various committees consisting of faculty, staff, and administrators. Once completed, the mission was reviewed and then approved by the Board of Trustees. The brevity of the mission has given the school focus, with sufficient flexibility to adapt to an ever changing school climate.

Are there parts of the mission statement about which there is a lack of consensus on meaning or interpretation?

The school's mission statement has a very high profile in the life of the school. Our community has clarity on each element of the mission statement. There is no lack of consensus on meaning or interpretation of our school mission.

In what ways does the school communicate its mission statement?

The mission statement is posted in every building on campus, inscribed in the center of campus (the Owl's nest – around the flag pole), and is prominent in all school electronic and hardcopy publications. The mission statement is at the forefront of discussion when the Head of School makes public addresses within our community. Our mission is the starting point of any major discussion that occurs at the administration or Board level. Likewise, when proposals are drafted, the

mission statement is at the forefront of dialogue before any organizational changes are made. The mission statement is the start to many classroom discussions, students are asked to reflect on the mission in essays, debates, and conversations among peers. In advisory, students are asked to embrace one mission-driven grade level theme each year. The mission is discussed during the hiring process with applicants. Hiring committees decide if applicants are mission-driven and mission-focused before contracts are extended.

What are the school's overall strengths in regard to the school's mission:

- The mission statement has broad support and is understood within the Overlake community.
- The mission statement is clear, concise, and action-oriented.

What areas of growth and/or recommendations does the school make with regard to the school's mission:

- None at this time

School Program

STANDARD: 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.

OVERALL PROGRAM

Section Writers: Gerald Buhaly, US Head & Brenda Leaks, MS Head

Date Completed: June 2015

**The school's program is congruent with the school's mission, philosophy and values.
How does the school's mission inform the development of the school's educational program?**

The Overlake School's mission statement (Inspire excellence, Develop intellectual curiosity, Teach responsibility, Embrace diversity and Foster a compassionate community) is a living, breathing presence that acts as both a framework and a reference point for all manner of thought processes and decision making within our school community: large, small, curricular, co-curricular and programmatic. It is common to hear our faculty, staff and administration ask how a particular course of action ties in with our mission. This mindset is modeled from the top, with our Board of Trustees and Head of School acting as exemplars of this mission-driven approach.

There are many opportunities within our community to develop new programs or to further develop existing programs. In each case, how a particular opportunity or direction fits with the mission is a part of the conversation and greatly impacts any decisions that need to be made.

In what ways is the implementation of the school program congruent with the mission?

Beyond using the mission statement as a reference for developing programs, it is also used to guide implementation of the school program. Because the language of our mission statement is grounded in active verbs, it is easy for us to tie every day acts to our mission statement. A few examples are listed below.

Students are taught and then coached to be aware of their own needs and to seek support from teachers, counselors or our learning specialist when needed. And, we frame those conversations with students in the context of responsibility.

We challenge our students to think about how they embrace diversity in large ways when we host exchange students and do service in communities that initially seem so different from ours, and we challenge them in small ways by asking them to be thoughtful when they chose costumes that don't stereotype or mimic others for Halloween or when we serve lunch entrees from diverse cultures.

A Middle School Task Force charged with working on a statement of purpose for the division, used the five parts of the mission statement to frame the academic, personal and social goals that we have for our youngest students.

The counseling department leads programming about inclusion and kindness within the context of compassionate community and about personal wellness in the context of inspiring excellence.

The school's overall program provides students with a school experience that promotes free and open inquiry and diverse perspectives and that promotes other characteristics and capacities that students will need to lead purposeful, healthy and constructive lives.

In what ways does the overall program promote, provide or encourage:

Free and Open Inquiry & Diverse Perspectives

Our approach to encouraging free and open inquiry and diverse perspectives begins with a belief that the community as a whole and students' experiences as individuals are enhanced by the inclusion of people from a wide variety of backgrounds. We see that diversity in our student body, our faculty and staff, and our parents. By intentionally building a community of people with different backgrounds and perspectives, we have laid a strong foundation for free and open inquiry. Even though our community is grounded in a common valuation of our mission, we are not homogenous nor filled with people who hold synchronized beliefs about every aspect of life. And, this diversity of perspectives is welcome.

The culture both inside and outside of our classrooms is that asking questions, thinking critically and formulating one's own understanding is vital for success at The Overlake School and beyond. Inside the classroom, this manifests as lively discussion, active listening, students reading or researching topics in order to deepen their own understanding and perspective, and students sharing how their individual or family experiences intersect with classroom topics.

Outside of the classroom, we see students who are highly engaged in all aspects of school life and who are willing to question rules or practices that seem to be unnecessarily arbitrary. And, while we don't actively encourage students to push the boundaries of authority, we are cognizant of the fact that by virtue of teaching students to form their own opinions about the world around them and the systems and structures govern that the world, we will regularly be faced with students who push us to reevaluate the boundaries that we have established. At Overlake, everyone has a voice that is grounded in their personal experiences and beliefs, and our community culture is one in which sharing one's voice is greatly valued.

What other characteristics or capacities does the school foster to prepare students to lead purposeful, healthy, and constructive lives?

In what ways does the overall program promote these characteristics and capacities?

During their tenure at Overlake, the school fosters many characteristics and capacities in our students, believing that students are more likely to lead a purposeful, healthy and constructive life if they:

- have a connection to and appreciation of the outdoors
- are challenged to give back in service to others
- connect with their own artistry
- explore deeply an area of interest or passion
- live actively
- have experience developing strong relationships with adults
- know how to advocate for their personal and academic needs
- can manage their time in pursuit of a goal
- can manage their stress
- learn to work cooperatively as a member of a team
- are compassionate and empathetic toward others

Many of those characteristics have been translated into graduation requirements for our students. We require a number of credits, hours or experiences in the following areas: Outdoor Education, Service Learning, Arts, Co-Curriculars (including clubs and athletics), Physical Education (including life skills), Project Week and Senior Project.

For areas that are not as easily turned into graduation requirements, we have formal and informal structures in place to teach those characteristics and capacities, as well as opportunities for students to practice them. Our classrooms provide the most opportunities for our students to learn and practice these characteristics and capacities. We have high expectations and a rigorous program that demands much from students. Our faculty see teaching students the skills needed to be a strong student and a strong person as a part of their curriculum. They also model for our students how to create strong relationships that are built on caring and mutual respect. Our counseling and advising program leads students through numerous activities each year via class meetings, small group sessions, in-class lessons and individual interventions. Their lessons touch on academic, personal and social skills that are necessary for a healthy life both at and beyond school.

The school's overall educational program and instructional practices stem from a set of underlying beliefs and assumptions about the ways students learn.

What beliefs and assumptions about how students learn inform:

The design of the overall program:

The design of the overall program is grounded in the idea that all students learn differently and that they all have unique strengths and weaknesses. As a result, faculty use a variety of teaching strategies within each course. These may involve teacher-centered instruction, student led instruction, flipped classrooms, video, audio, peer assessment and hands-on activities. Assessment strategies also vary with the primary goal being student feedback for learning. From our modern Language Lab to our Performing Arts facilities to unique spaces for Physical Education, we have created opportunities for all styles of learners to reach success in our program.

Overlake is a mission driven school. Thus, our mission informs programmatic decisions. The design of our educational program and instructional practices are grounded in the five tenets of our mission;

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

Our program is balanced across all subject areas and provides a strong liberal arts education. Students are required to take all subjects throughout the Middle School and meet graduation requirements in all subjects in the Upper School (Arts, English, Mathematics & Technology, Modern & Classical Languages, Physical Education, Science, and General Electives). Such course offerings in the program provide students the opportunity to experience areas of strength and areas of challenge in their time at Overlake. This also allows each student to better understand their own learning styles in a supportive environment.

Beyond academics, each Upper and Middle school student will be expected to perform community service, take outdoor education trips, and participate in a club, a production or on a team in our co-curricular program. These experiential activities are a critical part of our mission and as such are expectations for all students.

The design of the physical environment and learning spaces:

The Overlake campus, purchased in 1972, was originally a farm. Buildings were located throughout the property as would be expected on a farm. The current physical environment was largely dictated by the original farm layout which has provided an open park-like campus. Most of the original farm buildings have been replaced by modern teaching facilities that have been designed to provide teaching and learning spaces. All classrooms have been designed to accommodate a maximum of 18 students, are equipped with necessary technology and in some cases were designed for a specific subject. As the majority of buildings house a distinct subject, walking into each building provides the student with a unique learning environment designed for a specific discipline or grade.

The use of technology in the school program:

Technology is used as a tool in support of our academic program. As such, technology use varies throughout the curriculum. Overlake subscribes to a Bring Your Own Device (BYOD) technology philosophy that requires each student to bring a specific type of device to school each day. The parameters of this device are provided to parents and students. BYOD will be formally implemented as of the 2015-16 school year. The school implemented a BYOD policy in order to meet the growing demand of teachers and students for more ubiquitous technology. The school could not meet the demand and consistency of use with the school laptop carts. Additionally with the deployment of Canvas as the school's Learning Management System (LMS) it became clear that students need greater access to technology. Finally, in the Upper School, close to 70% of the students were bringing a laptop to school. For these reasons the school moved to a BYOD policy.

There were a variety of reasons for moving to BYOD. Prior to BYOD, the Technology Team provided laptop carts in each building for classroom use. This was an inefficient use of their time and resources. With the increased use of Canvas as an LMS (see below), there is a clear advantage for students to have access to technology both inside and outside of the classroom. Finally, we had no interest in managing a one-to-one technology platform for students.

Overlake uses Canvas as its Learning Management System software. All faculty and students are required to use Canvas for their courses. In addition to the required communication, grading, and calendar functions, faculty continue to expand their use of Canvas.

Approaches to instruction:

All students have unique learning styles. As such, there are a variety of approaches to instruction that are used by Overlake faculty. These vary according to the pedagogical needs of students in a specific subject. Direct instruction, inquiry based instruction, interactive instruction, experiential learning and independent learning all have a role at Overlake. Approaches to instruction may also be influenced by the needs of a specific student in a class with the support of our Learning Specialist.

In the 2014-15 school year, Overlake hired its first Instructional Coach whose sole responsibility is to work with faculty to improve instructional practice. The Instructional Coach was hired to work directly with faculty in a non-evaluative relationship. The goal was to create a community of teaching and learning where faculty, like students, are engaged in dialogue and feedback about the teaching methods they are using and how these methods help student outcomes. The Instructional Coach also provides in-house, ongoing, directed and regular professional development for our faculty.

Curriculum development:

Curriculum and assessment are each developed with student learning needs at the forefront. Four years ago, the school began an initiative to review assessment of student work. One of the reasons for this work was the sense that we were not consistent in our assessment practices both vertically and horizontally. There was also a lack of collaboration among faculty that created less consistency of approach. When faculty was asked about the purpose of assessment, it was unanimous that assessment was to enhance student learning. As a result of recent work, feedback to students has been more descriptive. A current goal of this work will be to have rubrics provided to students at the end of first semester of the 2015-16 school year.

Curriculum development is ongoing to provide students with not only a wide variety of courses but also courses aimed at challenging students to improve their skills and knowledge in multiple disciplines. With the recent shift from a 5 to 4 course load for faculty, academic departments explicitly added curriculum development alongside of the assessment work. One goal of this work is to identify best curricular practices in each subject area, compare this with our current curricula and adjust to ensure that we are providing the best education for our students. Both of these initiatives are ongoing, inter-connected and time consuming. There has been variation among departments in terms of progress in each of these two areas.

The structure of the school day and the school year:

The school schedule is designed to support our mission. The primary focus is on academics while providing time for students to pursue their interests. There are separate times built into the schedule for clubs, office hours, homeroom, and community time. A long block is scheduled for each course every eight days to provide time for more extended work in classes. Course meeting times rotate so that students experience each class at different times of the day. Within the schedule, each course is provided the same amount of teaching time which underscores the importance placed on each subject. Finally, no class is missed as holidays are not scheduled as academic days.

All of the aspects mentioned above are in place to provide students with a rich learning experience. Subjects are treated equally, conflicts are largely eliminated, class time is protected and opportunities for experiences outside of the classroom are present and easily accessible. It is unlikely that this would be possible with a traditional five day schedule.

The school year follows a September to June model. Overlake typically begins classes during the last week of August and ends after the first week of June.

The school utilizes quantitative and/or qualitative information to assess and improve its overall program.

What quantitative and/or qualitative information does the school use to inform its assessment of and decision-making about the school's overall program?

How is this information used to develop and continually improve the school program?

We are in a constant process of improvement at Overlake. Most of our programmatic assessment happens at the program level with the people who are most directly involved in providing the programming. For the daily work of teaching and learning, our assessment takes place within the department via discussion amongst department members, benchmarking against national standards, and the exploration of best practices gleaned at professional workshops and conferences. We also have a rotating auditing process that involves an outside expert. Our co-curricular programs use the same types of processes and information, including the external audit process.

We also informally invite feedback from students and parents on any and all aspects of our school program via administrators who have an open door policy and who regularly host lunches with parents to share information about school programs and invite parent questions, comments and concerns.

As information is gathered, leaders of departments and programs review and address it, using it to improve programming as needed. When feedback goes beyond one program or area, conversation (and subsequent decisions about best actions) may move to a larger body, like the Academic Council or the Administrative Team.

In what ways does the school assess graduate success relative to its mission?

We have two major ways of assessing graduate success relative to our mission: we maintain contact with them so that we can hear their stories and we survey them while they are still in college/university to hear their perspective on how well prepared they felt after leaving Overlake.

The school has clear and effective procedures for the assessment and communication of student progress and/or development.

How is assessment of student progress and/or development conducted?

Students are regularly assessed by teachers within their classrooms. Teachers use a variety of assessment methods and tools to assess students both formatively and summatively, including daily

homework and class assignments, class discussion, small checks for understanding (exit tickets, white boards, dialogues), projects, labs, papers, presentations, quizzes, tests, and cumulative exams.

How is an individual student’s assessment used in the development and/or modification of his/her academic program?

Generally, assessment is not used to modify an individual student’s academic program, but rather to guide day-to-day teaching in the classroom. Teachers use the information they gather about how students are mastering the skills, concepts and content of their classes to plan the succeeding lessons, moving forward as students gain proficiency or slowing down/circling back when students seem to struggle with a particular area. As our curriculum is set internally and our community is small, teachers feel comfortable adjusting curriculum to meet the needs of students and then communicating those adjustments to the faculty who teach the next grade level or subject.

There are instances when assessing a student does modify his/her academic program. These larger changes may include dropping, repeating or auditing a class and are made in consultation with the student, parent, teacher, division head and learning specialist.

Many of these conversations between teachers and with the learning specialist happen within a meeting we call “SAM” which stands for Student Assistance Meeting. These meetings happen by grade level and have the following people present: teachers, advisors, personal counselors, division heads/dean of student, and the learning specialist. Beyond providing an opportunity for adults to discuss concerns about a particular student or group of students, SAM meetings also allow the sharing of specific teaching strategies and learning styles in an effort to help teachers facilitate strong instruction for all students.

Describe how these assessments and modifications are communicated.

Teachers relay assessment information back to students via graded assignments, comments, conversations, rubrics. Canvas (our learning management system) is another way that teachers communicate assessment information to students. We also have formal reporting periods that happen four times each year in October, January, March and June when students and parents see cumulative grade percentages and either brief comments or extended narratives.

Any modifications made to a student’s academic program would be discussed even before the decision to modify was made. These conversations with parents are generally led by our learning specialist in consultation with teachers and division heads.

The school has a written curriculum guide.

How is the curriculum guide developed and communicated?

The Middle and Upper School curriculum guides have been developed by the division and department heads. Each course has a brief description that is written by the classroom teacher. These course descriptions are reviewed by the department chairs and the division heads prior to being published on our website. When the following years’ curriculum guide is published, parents and students are notified via email that it is available.

How is the curriculum guide reviewed?

The curriculum guide is reviewed each year by individual teachers, department chairs and division heads. The review begins in January for the following year with the aim of having the curriculum guide published by the first week of March.

The school communicates and coordinates the program between departments, divisions and grade levels.

How does the school communicate and coordinate the program between departments, divisions, and grade levels?

The department chairs play a significant role in communicating and coordinating the academic program. They are responsible for curriculum and assessment in their specific subject throughout the school. In order to accomplish this communication and coordination, there are monthly meetings of department chairs with administration, quarterly Academic Council meetings, individual department meetings every eight days and regular collaborative meetings during the week. There are regular grade level meetings in the Middle School. Finally, there are monthly division meetings as well as three in-service days per year.

The school has reflected upon what constitutes excellence in teaching in a way that is appropriate to the mission of the school.

What constitutes excellence in teaching at the school?

We have a formal statement of what good teaching means at Overlake that includes the following categories:

- planning
- instructional process
- instructional content
- learning environment
- student assessment
- student/teacher relationships
- communication
- collegiality
- professional development
- contributions to the community

The full document containing specific items for each of the categories above can be found in the appendix.

How does the school promote excellence in teaching?

We promote excellence in a number of ways. We have a formal faculty evaluation system that is designed to give teachers feedback in the areas we have identified above. It is a year-long process

that asks teachers to be reflective about their practice and to dig deeply into an area of growth in collaboration with their Division Head.

We also have an Instructional Coach who works directly with a small cohort of teachers for eight to ten weeks (roughly one quarter) to set goals for growth in the daily practice of teaching. Teachers set their goals and then work with the coach to develop a plan to achieve the goals within the time allotted.

We have a robust faculty professional development fund that encourages and supports teachers to learn more about their content and professional practice by attending classes, workshops and conferences. We also have three professional In-Service days each year that allow time for internal work and/or to bring in experts on various topics to support the growth of our teachers.

Our sabbatical program also acts as a means to promote excellence in teaching as it provides the funding to support one teacher each year as s/he explores an area of passion that is directly tied to his/her role at Overlake.

Finally, the culture of our school and the mission that we strive to achieve also promotes excellence in teaching as our faculty see themselves as models for our students in all areas of our mission.

Counseling & Advising

The school has developed the necessary services to nurture, support and meet the social, emotional, physical and learning needs of its students.

Section Writers: Diane Freytag, Director of Counseling & Advising, Susan Essex, Assistant Director of Counseling, Kristen Daniel, Learning Specialist (Past Employee), Lindsay Metcalfe, College/School Counselor, Lori Jones, College Counselor (Past Employee), Zoey Wilson, Counseling Assistant (Past Employee), Shawn Allen, Modern & Classical Languages (Resident Outsider)

Date Completed: September 2014

The Overlake School adheres to the philosophy that counseling and advising are an essential and integral part of the overall education process. Overlake's Counseling and Advising program addresses certain educational, college and personal objectives and is available to all students. As human growth and learning are developmental in nature, so is our program appropriately sequential in design and implementation, sensitive to individual differences and needs among students and their families.

The Counseling and Advising program exists to support and enhance the learning experience of students through their academic, personal, and social development. As such, our main goal is to provide effective, comprehensive guidance to students in the following four areas:

- Academic Advising
- College Counseling
- Learning Support
- Personal Counseling

These program areas are responsive and supportive as well as educational in their scope and delivery. Overlake students and parents are served individually, as needed, and in group settings.

Describe the services and/or programs aimed at nurturing and supporting the social, emotional, physical and learning needs of its students.

School Counseling (*supporting social/emotional needs of students*)

Overlake's School Counselors provide a wide variety of programs and services to promote students' academic success and their personal and social well-being. The personal counseling program is presented below in the following categories:

- Educational/preventive programs for students --The key distinction here is that responsive services are on-going, prompt actions and interventions to meet student and family needs as they naturally arise, while the educational and preventive services are pro-active, planned steps to address common childhood and adolescent issues and concerns.
- Faculty training and support
- Services and programs for families

- Responsive Services for Students

Counseling is provided in individual sessions for students who would benefit from further support regarding personal issues. These issues may include but are not limited to stress, depression, conflict with others, self-awareness, adjustment, and social skill development. Students can access counseling by dropping by or setting up an appointment, but counselors also regularly initiate contact when it is needed and request meetings. Parents and teachers can also raise concerns that warrant meeting a student, and crisis situations automatically require intervention with a student. Counselors work to improve family communication by helping students speak with parents and also by meeting with families depending on the situation and release of information confidentiality agreements with the student. As part of our Student Review Board procedures, students may receive mandated counseling as part of their discipline plan.

Educational/Preventive Programs for Students

Counselors work with students and teachers to build community in a variety of settings, including classroom discussions, homeroom periods, community times, class seminars, special events, and school assemblies. Our program is based on the five elements of our mission statement and are used as an over-arching framework for the presentation of discriminant pieces of content as well as our responsive care. How we do this and the structure of our program vary between Middle School and Upper School due to academic differences, scheduling, and developmental needs. Therefore, we are describing our work in each separately:

Middle School

We teach guidance lessons in the Middle School by first identifying the mission theme that it relates to and the particular personal, social, and/or academic skill(s) from the Middle School Statement of Purpose that we want them to learn. These skills were chosen by teachers and determine our mission (Please see "Middle School Statement of Purpose" in the appendix for the list). When we do guidance lessons, we work to embed that content into the learning that they are already doing with their teachers and advisors, wherever possible. For grade 5 we conduct "Owl Lessons" that are topics that teachers continue to refer to in class and advisory sessions afterwards. For grades 6-8 we connect that guidance lesson to coursework that the teacher is currently doing. For instance, in 7th grade science students learn about healthy nutrition in the spring. During the unit, the two personal counselors lead that discussion which addresses why people might make unhealthy decisions about eating (disordered eating, eating disorders) even when they have learned about nutrition. We connect this session to our mission statement of "Develop Intellectual Curiosity" and work with the skill of "Be self-reflective" to help them understand what could influence their personal eating decisions and/or body image, how media, peer pressure, and stress play influential roles in that decision-making, and what they can do to combat those influences. For most of these lessons we provide follow-up discussion questions for use in homeroom. We also often put information and questions in the School Bulletin or send emails home for parents to use.

Upper School

In the Upper School, we have assigned one mission theme per year to focus our time with that class. This mission theme is then used in our guidance lessons but also is often picked up by the advisory team in their work for the class. This continues our mission-driven framework and gives us some common language to use with the students. For instance, we talk to the 9th graders about physical and emotional boundaries and use an upcoming dance as an example, but put it in the context of their rights and responsibilities as they are “fostering a compassionate community.” This work is done at retreats for 9-10th grade, community times for each grade, homeroom visits, and Freshman Seminar. Community times are 20 minute meetings in which the whole grade assembles to work with a non-academic topic that involves the community. Freshman Seminar is a new program in which all freshmen will rotate through three 50-minute sessions meant to support their transition to the upper school.

See the appendix for information on the Personal Counseling: Social/Emotional Curriculum Sequence for Grades 5-12

See the appendix for additional information on our Personal Counseling Guidance Programs

Faculty Training & Support

Services for faculty

Personal counselors participate in Student Assistance Meetings in which we speak with grade-level teams of teachers about students with a learning and/or mental health need. We also have provided faculty-wide trainings on suicide prevention, mandated reporting guidelines, and non-suicidal self-injury, as well as shorter discussions of issues that come up, such as depression/anxiety.

Faculty are encouraged to consult with us when needed outside of meeting time. Those contacts are initiated either by email or in person; conversations with individual faculty are private. Teachers typically consult with us about particular students, but also will use us as a resource to address dynamics in a group or class.

Using the goal of intentional collaboration, the Personal Counselors, Learning Specialist, Director of Diversity, and the Dean of Students meet weekly to discuss our overlapping work with students. Monthly, the Counseling and Advising staff meet with the Head of the Upper School, Head of the Middle School, and the Dean of Students to discuss programs, issues, or individual student needs.

Services & Programs for Families

ParentNet Program: The ParentNet program is a parent-directed program designed to support and develop parenting, increase communication between school and parents, and foster mutual support among parents of the same grade level. Personal counselors act as faculty advisors for this program and at least one counselor is present to help facilitate each meeting. One meeting per grade level occurs each semester.

Parent Seminars: Counselors work with the PFSA to host educational nights for all parents to hear from experts in the field. This occurs once per school year.

Parents are invited to call with concerns about students. We serve as a resource for ideas on how to address issues within the home. Parents may also alert us to problems that we will address directly with the student.

See the appendix for Student Competency skills that are addressed and the Personal Counseling Program Prezi

Learning Support (supporting physical and learning needs of students)

Learning Support Services is a school-wide service that provides academic support and coaching for all students at The Overlake School. As such, we aim to teach independent learning skills that complement each student's specific learning needs. Services are delivered in a variety of ways including one-on-one instruction, academic counseling, group work, and grade level programming. Learning Support is also offered for all students in the following skill sets:

- Self-advocacy and accessing support when needed
- Organization and executive functioning improvement
- Study skills improvement (including note taking skills and test preparation)
- Time management and assignment completion
- Academic anxiety and stress reduction
- Skills for staying focused and engaged while learning

Services for Students with a Documented Disability or Medical Condition

504 Accommodation Plans--Students diagnosed with a disability (cognitive or physical) or medical condition may be eligible to receive accommodations. Overlake's Learning Specialist (LS) determines appropriate accommodations based on suggestions from a combination of current neuropsychologist evaluations, medical reports, assessment reports, performance data and school observations. 504 Accommodations Plans are shared with teachers at the beginning of each school year and revised annually based on the current level of support needed. The LS refers students and families to outside specialists who can formally evaluate the learning strengths/needs of each child.

Accommodations for standardized testing (SAT, ACT, PSAT, PLAN)

Families who may want accommodations for tests in grades 10-12 should notify the LS during their 10th grade year to ensure appropriate documentation is on file.

Supports for Parents and Teachers

Parent Support: Parent or family meetings with the Learning Specialist are scheduled upon request. The LS assists families in navigating learning support services available both at school and in the community based on an individual student's specific academic need.

Teacher Support: The Learning Support program also offers on-going professional development supporting faculty's use of instructional strategies to meet the needs of all students in their classrooms. This is done through regular grade level meetings as well as through online resources.

See the appendix for additional information on our Learning Support Programs & Services

Describe the process for introducing students and families to outside services designed to meet the students' needs?

Overlake's Counselors and Learning Specialist make outside referrals with some regularity in order to best meet the needs of students and families. Referrals are most often made when the student requires or desires a greater level of care than the school is able to provide. The two most common reasons for referral are for academic support and mental health care, with each category encompassing several levels of service.

Mental Health Referrals:

Students are referred for mental health care when they present with an acute crisis or a need for long-term, in-depth support. Depending on the nature of care required, students may be referred for:

- Risk assessment evaluations: for students with suicidal ideation or self-injury behaviors
- Crisis care: for mental health issues with sudden onset or critical levels of severity
- Ongoing counseling: individual, group, and/or family; may be provided by a therapist, psychologist, or community agency
- Psychiatry services: for medication evaluation and management

Academic Referrals:

The Overlake School does not offer educational evaluations or administer neuropsychological testing. If needed, we refer families to a list of practitioners. We also refer for educational consultants, private tutors, and academic coaches.

The Learning Specialist is the key contact for an official 504 Plan to be established. And she will establish whether or not a 504 Accommodations Plan is warranted on an individual basis.

How do we make connections with outside counselors/agencies?

The department maintains a list of potential referrals compiled from the following sources:

- Practitioners recommended by peer schools
- Specialists used and liked by Overlake families (note: when confidentiality is an issue, we avoid referring multiple students to the same mental health counselor or therapist)
- Personal knowledge and experience. Our referral list is an evolving document that is updated as we receive feedback on outside providers.

What factors lead us to make a referral?

The vast majority of referrals made by the counseling department are suggestions for students and families: although we may recommend that a student make a connection with an outside provider, it is ultimately the family's decision to do so. There are two exceptions to this case: when we feel that there is an immediate concern with student safety on campus and cases referred to Child Protective Services (CPS). When a student presents as an imminent danger to self or others, we require a

professional evaluation and documentation from that professional that the student is stable before the student may return to school. CPS cases are handled in accordance with legal and ethical mandated reporter guidelines and Overlake's internal policy; in these situations, the decision to contact CPS rests with the mandated reporter, not with the student or family.

For recommended (not required) referrals, we weigh the level of care that would be optimal for the student against the services that can be reasonably be provided at school. Most mental health referrals are made when a student would benefit from deeper level skill work on a regular basis, or from a connection with a counselor who is not affiliated with the academic environment.

How do we coordinate with outside support providers once the referral has been made?

When a student has sought outside services, the counseling department makes every effort to consult with that provider regularly, with a goal of unified support for the student in and out of school. School counselors will request that a student (and parent/guardian if the student is under age 13) sign a release of confidentiality to give their permission for information to be shared. Ongoing consultations with the outside provider are made on an as-needed basis.

What accommodations does the school make for the special needs of individual students? Please give examples.

The school provides 504 Accommodations Plans, under Section 504 of the Rehabilitation Protection Act of 1973. The 504 Plans provide reasonable accommodations to students with a diagnosed disability or impairment that impacts a student's ability to access the general education curriculum. A disability or impairment is defined as a physical, mental, or cognitive impairment which substantially limits one or more major life activities, including school based activities in the classroom.

The process for a student to be placed on a 504 Plan starts after teachers have made attempts to respond to a student's need(s) and determined additional assistance and support is needed. The student then must demonstrate the existence of a disability or impairment with either a medical or cognitive evaluation by a licensed medical professional. Additionally, that disability or impairment then must impact the student's ability to be successful in the classroom to warrant a 504 Plan. This impact is assessed by the Learning Specialist and a student's teachers.

A student can be placed on a 504 Plan for specific learning disabilities (such as dyslexia or dysgraphia), other health impairment (such as ADD or ADHD), a physical impairment, or a diagnosed mental health disorder. Additionally, we provide Temporary 504 Plans for students that need accommodations for a period of time of no more than one semester. A student can transition to a regular 504 Plan from a temporary 504 if all of the criteria are met for a traditional 504.

Accommodations The Overlake School Provides its Students:

Overlake provides the following types of accommodations to students (accommodations are not limited to this list. They are given on an individual basis depending on student need):

- Extended time on in-class assignments (if needed), quizzes, and/or tests
- Extended time on standardized assessments

- Preferential Seating
- Use of a laptop and/or calculator
- Use of a laptop or computer for written assignments and assessments
- Access to/copy of notes
- Alternative forms of assessments
- Checks for understanding
- Pair verbal instruction w/visual questions
- Movement breaks
- Alternative testing schedule
- Separate and distraction-free testing environment
- Flexibility with due dates
- Task analysis on projects
- Use of lined or graph paper
- Use of assistive technology in class
- Oral testing
- Frequent breaks
- Stop-the-clock testing

What guidance does the school provide students and parents about the next steps in a student’s educational career?

Academic Counseling

In the role of Grade Level Deans, Overlake’s Upper School Head and Counselors provide Upper School students with additional guidance regarding academic planning and course selection based on each student’s interests, abilities and college aspirations. While consultation may occur throughout the school year, the Deans meet individually with all students during the course registration period in the spring. Deans meet with students to review their course placements for the following year, their progress in fulfilling course requirements for graduation, with particular attention paid to their total number of credits and core academic courses, and whether they are meeting other requirements, such as co-curricular and service learning expectations.

College Counseling

As a college preparatory school, Overlake’s college counselors are committed to helping students and their parents make informed decisions about college planning and college selection. Beginning in 9th grade with a focus on academic planning at Overlake and for college, the college counseling program provides individual counseling for students and their parents, as well as a wide variety of group programs to educate them about college entrance exams, college options, resources, and admission procedures. Our goal is to prepare students to make informed decisions regarding colleges that provide a good match to their own interests and needs, recognizing that there will be more than one “right” college for each student.

Students and parents are made aware of the professional practices and ethical standards established by the National Association for College Admission Counseling and informed of their own rights and responsibilities in the college admission process.

Overlake's College Counselors help students recognize their college options and the pathway towards achieving their educational goals. Good communication among students, parents, counselors and teachers, coupled with orderly planning and management of the college search and application process lead to the greatest success and smooth transition to college.

College Counseling Goals

- Educate families about issues related to college planning, the admission process and college choice
- Assist each student with college search and selection
- Help students develop strong admission applications and interviewing skills
- Enhance students' career awareness as it may relate to their selection of majors on college applications

College Counseling Program Focuses By Grade Level

9th Grade

- Academic Planning
- Overview of College Planning & Admission Criteria

10th Grade

- Self-Awareness—academic strengths and weaknesses; reflection
- Exploration of college and career options

11th Grade

- Identification of interests & priorities
- Discovering colleges that match interests

12th Grade

- Preparing effective interviews and compelling essays/applications
- Making informed college choices

Please see the appendix for additional information about Overlake's college planning programs, workshops, meetings and campus tours scheduled each year.

Resources

Overlake is one of the earliest subscribers of nationally renowned **Naviance website**. Used extensively by members of the Overlake community and referred to as *Family Connection*, it is a comprehensive web-based service designed to facilitate college planning, research of colleges/scholarships/careers and manage student profile information. Overlake college counseling staff use the system to communicate with families about special events and to share a wide range of information related to college planning. Registration codes and directions for use are sent to all new Overlake families. A link to this website is included on Overlake's Homepage.

For students interested in Enrichment Programs, we offer online resources through Family Connection and Enrichment Alley. Students can browse programs by selecting their area of interest.

The database includes options ranging from summer and gap year, to academic and enrichment, to travel and service.

The College Resource Library is located in the Counseling and Advising Center which is in Overlake's Library Building. It provides hundreds of college guides, catalogues, and test preparation materials that are available for loan to students and parents.

Literacy

Section Writers: Ann Ewel, Director of Library Services, Rebecca Moore, Librarian, Karen Wright, Assistant Librarian

Completion Date: March 2015

The school develops information literacy in its students.

Describe your information literacy/library program and its goals.

Students need not only traditional information literacy skills (identifying, locating, evaluating, analyzing and synthesizing content), but digital fluency and critical thinking skills to navigate, utilize, and adapt to the widening scope of digital information.

Students will become adept at the fundamentals of research, using a variety of print and online resources, programs and tools. Skills include the abilities to identify, locate, evaluate, and utilize topical information from relevant print and online resources for academic projects and/or personal interests. Students receive instruction individually, in skill-differentiated small groups, and as part of a full class.

Students will learn how to ethically acknowledge information sources, understanding academic use of resources, and the importance of accurate citing to avoid plagiarism and to be copyright compliant.

- Starting in 5th grade, students will be able to use Noodle Tools (an online citation/note taking tool) to create accurate and increasingly complex citations for all resources used, in subject-appropriate citation format. (Librarians give formal and informal feedback to students at all levels on the quality of their resources and accuracy of their citations).
- Students will be able to differentiate various levels of copyright licenses, from the most restrictive to the more flexible creative commons licenses. Students will be able to make ethical and informed decisions on which material they can use either in school or online.

Students will be able to understand and employ the skills of good digital citizenship.

- In conjunction with the 5th grade orientation class, the 10th grade Life Skills classes, and the Counseling Department, librarians work with students to help them develop positive online interaction skills, think critically about their own interactions online, and learn how to constructively deal with negative interactions. For example: 5th graders learn about the power of words used while using social media, how to assess appropriateness of specific responses/messages, how to recognize/respond to cyberbullying messages, to understand the lack of privacy in social media and the impossibility of completely deleting information, to compare words used through social media vs. words used face to face, and to work in teams. In the 10th grade students delve into their use of social media, privacy settings and digital footprint.

Students will develop a love of story and narrative through reading, writing, and media. Librarians provide: an extensive and culturally diverse collection of fiction and nonfiction print and e-books chosen for our school community; book and writing related activities, including student clubs and the Middle School Literary Magazine; engaging displays; Middle School literary contests; Middle School book talks; and Individual Reader's Advisory.

How does your information literacy/library program support the school's programs?

The Library is a warm and welcoming place, offering a variety of workspaces and technologies to support different styles of study and accommodate class instruction and research. Teachers reserve the library computer lab and instructional spaces to collaborate with librarians in presenting research strategies and resources for class projects and assignments. An upcoming renovation will continue the transformation of the Library into a Learning Commons with more flexible options for individual and group study/reading/research/creation.

Librarians support the curriculum and the work teachers do in classes by:

- Collaborating on research projects.
- Providing print, media, and online resources for specific curricula, as well as maintaining a core collection in a variety of formats (print, e-book, digital, etc.) for 24/7 accessibility.
- Creating web pages detailing resources and providing links for subject areas, assignments, research projects, and teachers on the library website, library.overlake.org.
- Teaching project-specific research skills, and source evaluation.

Librarians offer differentiated Instruction to serve different learning needs/styles by:

- Providing instruction for full classes, and also working one-on-one with students.
- Collecting and offering a diversity of materials and methods of access, including: books (print and online), DVDs; audiobooks, research databases, serials: magazines, journals, and newspapers in print and digital format, and desktop computers, laptops, camcorders, cameras, e-readers, iPads.

Librarians work to anticipate our students' evolving needs by updating our technology, resources and reconfiguring the interior of the library. As we move forward into our BYOD program, we will reduce the number of library computers, while still providing appropriate technology.

Currently, the Library provides appropriate spaces for students at all grade levels through:

- A main area for all students with twenty computers, study tables, and additional informal seating.
- Two group study rooms with white boards.
- An instructional computer lab with nineteen computers and a smart board.
- Middle school students have a dedicated space with an extensive grade-appropriate fiction collection.

Examples of curricular projects for which librarians offer instruction and resources:

Middle School Projects

- 5th Grade: Orientation, Ancient Civilizations, Mathematical Curiosities, Mythology, Genre Literature Presentations and Projects
- 6th Grade: Current Issues, Animals
- 7th Grade: Endangered Languages, Science Articles, Religions
- 8th Grade: Debate, Political Information, Washington State

Upper School Projects

English:

- 9th Grade: Film Criticism
- 11th and 12th Grade: Literary criticism research papers, elective and AP - American and World literature
- 11th AP English: Narrative Non-Fiction Analysis and Argument

History:

- 10th Grade: Nazi Era Research
- 9th and 11th Grade: Smaller research projects throughout the year, for example: Abolitionists, Ancient African Kingdoms

Science:

- 10th Grade: Alternative Energy
- AP Environmental Science: Energy Analysis by Country

Physical Education

- 10th Grade Life Skills: Digital Citizenship

What are the school's overall strengths in regard to the school's mission:

- We collaborate with teachers across the curriculum in both the middle and upper school. We support their research projects through student instruction, creation of resource lists (LibGuides), and teaching resource evaluation.
- We support student attribution of sources by in-class instruction and working closely with students on their works cited/references using the citation software Noodle Tools in 5th – 12th grades. This tool enables us to give individualized feedback and differentiated instruction in student research and attribution.
- We support reading and reading programs with 5th and 6th grade book talks, collections in both print and e-book form and displays. We also curate lists (including the Faculty/Staff “Books I have loved” and summer reading), by compiling the reading lists and providing links to print and e-books on our Libguides.
- We teach Digital Citizenship in both 5th and 10th grades, emphasizing attribution, digital footprint, copyright, and creative commons.
- We create an atmosphere of literacy and love of reading/writing/creating through popular middle school contests, activities, and makerspace programming.

- We keep up with current developments in the field through reading, conferences, webinars, association memberships and collaboration with teachers, IT personnel, and other librarians.
- We support the school curriculum through comprehensive information on our LibGuide pages (library.overlake.org), library programs, and class projects
- We maintain subscriptions to a comprehensive selection of online databases to support student learning and research.
- Student visits: The Overlake Library is heavily utilized. We average 500+ student visits a day (not counting after school).

What areas of growth and/or recommendations does the school make with regard to the school's mission:

- Research skills need to be practiced at regular intervals. The higher level research skills need additional instruction in the upper school.
- We need a scope and sequence of research skills and ethical practices that are integrated more deeply into the curriculum.
- Lack of space makes accommodating our numbers difficult at times, and can result in a livelier atmosphere than is ideal.
- The collection needs to be streamlined to maximize both utility and space.

The school's online education and/or distance education is congruent with its mission and beliefs about how students learn. (Respond if your school utilizes online/distance education.)

Not Applicable

Co-Curricular Programs

Section Writers: Mike Davidson, Upper School Dean of Students, Erin Gabriel, Arts Department Chair, Beth Highland, Director of Service Learning, Dave Parsons, Senior Projects Coordinator, Kent Renno, Director of Outdoor Education, Robin Wheeler, Project Week Director (Past Employee), John Wiley, Director of Athletics, Meghan Waddle, Middle School Athletic Director / Director of Summer Programs

Completion Date: May 2015

The school has developed a co-curricular program congruent with the school mission and contributing to preparation of students to lead purposeful, healthy and constructive lives.

Describe the school's co-curricular program and explain how it supports the school mission and program.

The educational philosophy at The Overlake School is holistic. Overlake strongly believes that students need to spend time at school developing their ability to think critically and hone their intellect, but also we believe it is imperative that students spend intentional time to develop their physical, mental and social health. In keeping with this philosophy and in support of the school mission, Overlake has developed a vibrant co-curricular program in both the middle school and the upper school. There is a wide range of co-curricular activities from which students can choose, and participation in different elements of the co-curricular program is required for graduation. Co-curricular opportunities exist for Overlake students in the following programs:

- Athletics
- Outdoor Education
- Service Learning
- Performing Arts
- Clubs and non-athletic teams
- Project Week
- Senior Project

Participation in Outdoor Education, Service Learning, Project Week and Senior Project are required for graduation. For Athletics, Performing Arts and Clubs, each student is required to complete two co-curricular credits during their time in the Upper School. A student's diploma and transcript will be held if he or she fails to meet this requirement. Generally, a credit is earned for one semester of work in a club; in the case of athletics, one sports season; drama, one dramatic production. While MS students don't have specific requirements, service, clubs and Project Week are built into their schedule. Athletics, outdoor education and performance arts opportunities are also available and highly subscribed to.

Responses for the remainder of this section will be grouped by co-curricular program.

Athletics

The Athletics Department mission statement is "To teach character to multi-sport athletes in a competitive, fun environment."

The Overlake Athletic Department creates both a competitive and fun environment by providing a challenging program of interscholastic sports at both the middle school and upper school levels. We offer each student a broad range of sports including soccer, cross country, volleyball, basketball, lacrosse, tennis, golf, ultimate, and baseball. Our athletic program fosters personal growth in student-athletes, enhancing their leadership and athletic skills, as well as an appreciation for community involvement.

Our Athletic Philosophy falls under three major components:

Student Participation is vital to our programs. The Athletic Department at Overlake seeks to create a competitive, fun environment, where every athlete has a strong chance to succeed and therefore will choose to participate. In 2013-2014, 387 of 495 students in grades 6-12 played on an Overlake team, 78% of the student body. Overlake's average athlete plays in 1.7 sport seasons per school year. Overlake's Policy of Inclusion means that any student who turns out for a team and is willing to make the commitment will be placed on one, no matter the student's skill level or experience. We are proud of the fact that we have a wide range of athletes among our 55+ teams each year, each receiving a competitive experience and all of the benefits that playing sports provides.

Skill Development is the key to success on the field, with excellent coaches teaching skills to athletes who gain experience and confidence in executing what they have learned. Athletes are placed on teams by skill level. Our league membership at both the middle and upper school levels offer rival schools who have similar philosophies, so finding appropriate competition for the most advanced, beginner, or those teams in between, is entirely possible.

Teaching Values is the single most important thing an Overlake coach can do. Instilling a work ethic, teambuilding and teaching the values of sportsmanship in both sports and life pay valuable dividends to the student long after his/her playing career is over.

Outdoor Education

The Overlake School Outdoor Education Program was born under the philosophy that students learn and grow in an outdoor environment. Our trips emphasize cooperation, perseverance, concentration, judgment, and leadership by creating an experience in which the wilderness and the activities involved challenge the students to develop these traits. Our goals are for students to:

- Gain exposure to new experiences which challenge their physical and emotional limits, thereby challenging them to expand those limits and develop the confidence to take healthy risks and strive for success.
- Be placed in an environment in which they need to take responsibility for their own actions and belongings and to cooperate and work together with others.

- Develop an appreciation for the natural environment through first-hand experience, and to learn and practice “Leave No Trace” principles.
- Learn the skills necessary to undertake various activities in the outdoors.
- Gain a basic knowledge of various natural science topics through field observations and apply some of what they have learned in the classroom.

The Outdoor Program offers a wide variety of trips (about 35 different trips per year) for all the students, including hiking, backpacking, snowshoeing, snow camping, sea kayaking, rock climbing, mountain biking, rafting, etc. During the school year, most of the trips are on the weekends. Summer trips are also offered. In the Middle School, trips are optional, but students are encouraged to go on trips to try a new activity. In the Upper School, there is an Outdoor Education graduation requirement. The requirement is that all students must participate in at least two days of outdoor trips within their four years of high school.

The Outdoor Program is also heavily involved in the PE Department teaching rock climbing and taking students on the ropes course. It offers many outdoor trips during Project Week. It helps to plan and organize the 10th grade overnight camping retreat, and 8th Grade Field Studies, where students camp out and participate in outdoor activities at the end of their 8th grade year.

On each trip, we do believe that the Outdoor Program supports the mission of the school by Inspiring Excellence, Developing Intellectual Curiosity, Teaching Responsibility, Embracing Diversity, and Fostering a Compassionate Community. We do believe that students learn and grow a great deal in the outdoors. We want each student to be challenged and take some healthy risks. This will help them develop confidence in themselves. This confidence can transfer back onto campus and into the classroom. On these trips, they are put into a position where they need to take responsibility for themselves, where they must learn self-care, how to stay warm, dry and hydrated. They are responsible for their own gear, must cook and clean up after themselves, and learn how to travel and live as a group. They also learn that they have a responsibility to the group and must cooperate and communicate to fully participate on a trip. Students are also put into a leadership role on trips where they are making group decisions.

Service Learning

Service Learning furthers the Overlake mission: To teach responsibility, Foster a compassionate community, Develop curiosity, Embrace diversity, and Inspire excellence. Through structured and self-led service learning programs, students develop and apply interpersonal skills, engage in problem-solving, further their understanding of various challenges or needs within our community (and beyond), and develop meaningful connections between their experiences and interactions with others throughout the process.

Engaging in service generates positive change for the organizations and individuals that students serve. Whether attending a field trip to volunteer for a non-profit during the school day or participating in a personally selected outreach activity, students gain an understanding of their role as responsible, caring citizens in helping to meet community needs. Moreover, research indicates that students engaged in service during high school are more likely to remain civically-engaged adults, with significantly higher rates of voting and volunteerism. Service Learning not only supports the

school mission, but also upholds the school's goal of generating educated and empowered global citizens.

Students in grades 5-8 participate in two Service Days each school year, and students in grades 9-11 participate in one. Advisory groups in each grade spend these days with community partners, focused on a different theme each year:

- 5th Grade-Caring for Community Spaces
- 6th Grade-Environmental Stewardship
- 7th Grade-Food Insecurity and Hunger in King County
- 8th Grade-Engaging in Community (working with programs serving youth, seniors, individuals with special needs, and local families)
- 9th Grade-Environmental Stewardship
- 10th Grade-Food Insecurity and Hunger in King County
- 11th Grade-Engaging in Community (working with programs serving youth, seniors, individuals with special needs, and local families)

Upper school students have a service learning requirement of 15 hours for each year they are enrolled in the Overlake upper school. For the typical student who begins upper school in 9th grade, 60 hours of verified community service on behalf of nonprofit organizations is required to graduate. In 2014, 88% of graduating seniors exceeded that requirement, with an average number of over 120 hours per student.

Arts

While the Arts department is an academic department, numerous co-curricular opportunities in the arts are offered for students at Overlake in the form of art/music/drama clubs, project week options, the all-school musical, and the 5th & 6th grade play. In addition, our yearly ArtsFest in May showcases student artwork and our student performers, with an evening full of activities and events for our community. We have a strong technical theater program, utilizing student leaders in various positions backstage and in the booth, for three to four productions a year. Lastly, Overlake students successfully manage the annual Benefit Concert, Open-Mic Night, and the Film Festival with very limited faculty involvement each year.

All of this is possible because of our school-wide commitment to educating the whole child, and support for an ongoing and broad arts education. Our students experience responsibility, excellence, curiosity, diversity, and compassion on a daily basis within our curriculum, and also outside of the classroom.

Co-curricular offerings in the arts include:

- Clubs: Y-Chromotones, Unaccompanied Minors, Garage Band, Film Club, Graphic Design Club, Art Club
- Tech Theater: stage managers, assistant stage managers, assistant directors, sound and lighting designers, backstage running crew, musicians, hair and makeup assistants, and student choreographers for several shows each year.

- All-School Musical: Approximately 80 students participate every other year in this school-wide production as actors or technical support.
- 5th/6th grade play: Approximately 25 to 30 fifth and sixth graders participate in this after-school activity, every other year.
- Concerts and Events: Students lead the way for our annual Benefit Concert, Open Mic Night, and Film Festival each year, putting in many hours of work and preparation for these events with very limited assistance from faculty.

Clubs and Non-Academic Team

Overlake’s club program offers students an opportunity during the school day to pursue interests and passions that they otherwise might not have the time or opportunity to pursue. Further, club leadership or sponsorship provides a leadership opportunity for students in which they can develop the skills necessary to create unique offerings and guide other students in activities for which they have a passion. In an eight day cycle, there are two club periods, and clubs can choose to meet in one or both of those periods. The school makes every effort to protect this time in the schedule for clubs only

Sampling of Middle School Clubs

Animation Club
 Climbing Club
 Debate Club
 Social Justice Club
 Ultimate Frisbee Club

Sampling of Upper School Clubs

Bias in Sports Media Club
 Dungeons and Dragons Club
 Outreach Club
 Philosophy Club
 Running with Scissors Club (fashion design)

In the middle school, students are required to sign up for both club periods. In the upper school, participation in clubs is optional, but the vast majority chooses to get involved. In 2014-15, 80 percent of our Upper School student body took part in at least one club during the eight day cycle. During the first semester of 2014-15, there were 38 active Upper School clubs. Middle school students had 15 clubs to choose from during the first quarter.

A number of our clubs have evolved into true teams which take part in interscholastic competitions and often require a level of commitment well beyond the club periods during the school day. Students on these teams have the additional benefit of interacting with students from other schools and representing Overlake in the larger community. Non-athletic teams competing for Overlake in 2014-15 include:

- Debate Team (MS & US)
- Math Olympiad Team (MS)
- Robotics Team (US)
- Chess Team (US)
- Improv Team (US)
- Model UN Team (US)

Project Week

In recognition that education does not take place only in the classroom, The Overlake School dedicates a week of class time each year to Project Week, a co-curricular, cross-grade level, experiential education program embedded within the regular school year. Project Week courses are as varied as the young people who participate in them. Approximately 40 projects are offered, providing opportunities for learning, growth, improved self-confidence, and fun.

A variety of projects are offered including service learning, outdoor education, fine and performing arts, language exchange, environmental education, and many other areas. Students select five projects they are interested in from the Project Week Catalog, and are then placed in a project group by the Project Week Director. Projects are cross grade level and led by teachers and staff from all divisions, which allows relationships to develop outside of regular classes. Each project fulfills program goals and leaders evaluate student's participation in the project. The curriculum for projects is developed by Overlake faculty with an emphasis on the program goals:

Experiential Education: This is learning by doing. Students are intensely involved in a focused activity for a week. The presence of an Overlake teacher, and often other experts, ensures a quality, guided learning experience.

Challenge: Students challenge themselves in many ways. They are exposed to new activities and presented with the opportunity to try something new. Their physical and/or creative limits are stretched. Whatever the challenge may be, it is posed in such a way that growth is inevitable.

Group Process: All Project Week courses are group experiences, although a small number of students each year apply for and are granted the ability to design an individual Project Week. Participants get to know students of other grades, teachers, and even their old friends in new ways. Sharing and cooperation are emphasized, as students are asked to work closely with others and to share their thoughts with the group.

Reflection/Presentation: Time is set aside both during and after Project Week to reflect on the week. Presentations either to the group or the school as a whole are important parts of the project as they complete the learning experience and provide positive closure.

Senior Project

The Senior Project is an experiential learning opportunity that helps students transition from school to adult life. For three weeks during the month of May, seniors are involved in an off-campus, independent project that is intended to add depth to the students' senior year; it is a challenging, self-directed, and self-disciplined enterprise that allows students to make decisions and be responsible representatives of The Overlake School in the wider community.

Projects are conceived and researched by the students themselves and can cover a wide range of fields including academic research, teaching, technology, community service, communications, business, outdoor education, art, politics, and the environment. The students can gain experience and insight into a career that they might wish to follow in the future, or they can immerse

themselves for three weeks in an area of particular interest to them. Seniors must take part in a Senior Project in order to graduate.

The students research their field of interest, contact potential supervisors and arrange to spend the three weeks with a business or non-profit organization. So that they can share what they have learned with the entire community, each student makes a formal presentation during the final week of the school year. The students can invite teachers, parents, fellow students, relatives and family friends to their presentations. Feedback on their presentations is given to the students by homeroom advisors and school administrators.

How does the school assess the effectiveness of its co-curricular activities?

Assessing the effectiveness of each co-curricular program is first the responsibility of the program directors in charge of each program element. Program directors meet regularly with their supervisors to discuss program goals and progress toward those goals. In addition, several of our larger co-curricular programs have gone through an external audit process modeled after the audits for our academic departments.

During the 2014-15 school year, the decision was made to form a Department of Experiential Education beginning with the 2015-16 school year. To begin, this department will include Outdoor Education, Service Learning and Project Week. Program leaders in this group will all report to the Dean of Students, and will move to shared space in the Student Center.

Each co-curricular program assesses the effectiveness of its offerings through formal and informal means.

Athletics

Assessment for coaches in athletics is an on-going process aided by feedback from both athletes and the Athletic Directors at the upper and middle school levels at different times.

In Season

All coaches' performances are evaluated in both practices and games by the Athletic Directors. The feedback is emailed to and/or discussed with the coach after each event - practice or game. If there are concerns with regards to patterns seen, the frequency of the evaluations throughout the season increases.

Post Season

Upper school coaches are given feedback from a 35 question survey sent to every athlete. The data is tabulated and the comments of both concern and acclaim are discussed during the coach's review. In addition, the Athletic Director reviews the performance of the coach using the department standards at the conclusion of the season.

Middle school athletes receive a one page questionnaire asking them for their feedback on their coach which is shared as part of the final review with the coach by the Middle School Athletic Director.

Outdoor Education

The school assesses the effectiveness of the Outdoor Program in a variety of ways. At the end of each trip, there is a debrief with the students and the outdoor instructors. Typical questions are: did the students enjoy the trip, what did they learn, and what was their favorite part. Without a doubt, the feedback from the students is positive. They really enjoy themselves on the outdoor trips, and get a lot out of them. We also receive this feedback from their parents.

We also know the Outdoor Program is effective through student participation on trips. Many of the trips fill up completely, year after year. On average in a given school year, 33% of the students participate on an outdoor trip with a high of 42% of the students last year. This percentage has been increasing over the last 8 years.

Service Learning

The program is evaluated in both formal and informal methods. Measurements of success include regular reporting from students on independent hours completed, which also includes feedback and reflections composed by every Upper School Student. Evidence of program health and strength include students not only meeting but exceeding requirements, enrollment in service-based clubs, enrollment in service-based Project Week offerings or Senior Projects, and direct feedback from partnering organizations regarding accomplishments of student groups as well as invitations to return for future volunteer visits. The school has partnered with some organizations for as long as twenty years. Maintaining positive and consistent relations allows the school and partnering non-profits to thrive in a mutually beneficial relationship.

Informal evaluations include anecdotal feedback from students, teachers, parents, alumni, and non-profit representatives. In addition, reporting to school groups such as Administration, PFSA, the Diversity Committee, and the Board of Directors provides opportunities for reporting as well as feedback. Continuing to develop effective evaluation tools is an identified area for future development.

Arts

We know our co-curricular activities are effective because of the steady numbers and interest of our student population. We pay close attention to student feedback and evaluations, as well as stay current with student interests and additional opportunities for leadership in the arts. The arts are also very public in nature, and our presentations (performances, etc.) provide immediate assessment from our audiences – especially our parent population.

Project Week

The school assesses the effectiveness of Project Week through a variety of methods, both formal and informal.

Formal: The program director is formally evaluated by the Middle School Head and as part of this evaluation, received feedback from multiple members of the school community. In addition program policies and procedures were reviewed by an outside consultant on international travel practices.

Informal: Student enrollment in projects is a strong indicator of effectiveness of individual projects. Anecdotal comments from parents and students are collected each year. Program overviews are regularly presented to Administration, faculty, PFSA, and the Diversity Committee. These presentations provide opportunities for discussion and feedback is noted and taken into consideration for program review.

Senior Projects

It is difficult to assess the effectiveness of the program for each student. The individual's experience will depend on the organization that they are spending time with and the student's choice of project and approach to the task. Some organizations are better than others at ensuring the students have a worthwhile, positive learning experience. During their time away from school, the students send their homeroom advisor and the senior project coordinator a report on their progress for the week, covering aspects that have gone well and any issues that they have faced. This encourages them to reflect on their overall experience and help prepare for the formal presentation back at school.

Feedback is also sought from the class during the final week of school on the effectiveness of the preparatory steps taken at school leading up to the project; the level of communication and support they received in preparation for their three weeks out.

Clubs and Non-Athletic Teams

The primary way individual clubs are assessed is whether enough student interest exists for the club to continue to run. As student interests evolve, some clubs fade away from one semester to the next while new ones are started to take their place.

Describe how co-curricular activities support student preparation for purposeful, healthy and constructive lives.

Co-curricular opportunities in all areas are a vital part of the education all students receive at The Overlake School. Because we have a graduation requirement that demands at least minimal participation from each student, we are creating an environment that supports success and explorations outside of the traditional academic classroom.

All of these experiences represent the kind of "safe risks" we want our students to take as they learn about who they are and who they want to become. Mahatma Gandhi stated, "The best way to find yourself is to lose yourself in service to others." This presents a dichotomy that in order to grow and reach our own full potential we must apply our effort, strength, and skill toward those around us. This brings fullness and constructiveness to students' lives not only in the present, but also far-reaching effects into their adult lives, and applies not just to service learning, but to the group process required to be a successful member of a backpacking trip, an athletic team, or the cast of a musical production.

Our co-curricular programs provide the most direct path to student leadership, as these activities are truly owned by the students participating in them, and are willing to elevate students in the planning and execution of events in a way that is not often possible in the classroom.

What are the school's strengths in regard to the school's overall program:

- Overlake offers a huge array of co-curricular opportunities for a school its size, and student interest and participation in co-curricular programs is strong
- The school has created professional director positions with dedicated time for many of our co-curricular programs (two full-time Directors of Athletics and a full-time Director of Outdoor Education, for example), and many of these program directors have been in their positions for years
- The school provides excellent facilities and financial and logistical support to these programs
- Co-curricular programs are treated with a high level of respect within the overall school program
 - Participation in co-curricular programs is required for graduation
 - Time for clubs is built into the school day; Project Week and Senior Project meetings occur during "school time."

What areas of growth and/or recommendations does the school have in the overall program:

- Our co-curricular programs compete with each other and with our academic program for the scarce and important resource of student time. As our students feel increasingly pressured to perform academically, our co-curricular programs must find a way to maintain high levels of student involvement
- The decision to launch an official Department of Experiential Education for 2015-16 is a significant step- the next challenge will be to use that structure to present a more unified vision for experiential education to students, faculty/staff, and parents
- It can be more difficult to predict in the admissions process which prospective students will make significant contributions to our co-curricular programs. As a school we continue to refine our admissions process to ensure that we are targeting students who will be successful in the classroom and embrace all that is offered outside the classroom
- The school should continue to consider specific graduation requirements connected to co-curricular programs and determine if they are appropriate

School Program

Section Writers: Gerald Buhaly, US Head & Brenda Leaks

Completion Date: June 2015

The school has the necessary resources to support the overall educational program.

Does the school have the necessary resources to support its overall program?

Yes. There are sufficient resources to meet the goals of the overall program. During the school year departments and divisional heads have budgets that were created the previous year based on actual expenses. Additionally the school has ample resources to support a department or teacher in changing a class mid-year. In the past three years the school has responded when teachers have asked for changes to furniture or classroom layout. In planning for the new school year the divisional heads and the Head of School review student requests and adjust the FTE based on these requests. An area that needs to be addressed in significant manner is the lack of space in the current Math & Science building. Given the interest in science combined with hiring additional faculty there is no flexibility with room usage and office space in this building. Clearly there needs to be a major focus on correcting the current situation.

If the school is not able to furnish sufficient resources to meet the goals of the overall program, how does the school address this challenge?

Not Applicable

Has the allocation of resources at the school changed significantly in the past five years? If so, please explain the changes and the reasons for them.

No, the allocation of resources at the school has not changed significantly in the past five years.

What are the school's strengths in regard to the school's overall program:

- The school mission is the guide for all major school decisions.
- School graduates are well prepared for the transition to college and beyond.
- The addition of the Instructional Coach and the Tech Mentor has increased our support of Faculty seeking to improve their teaching practice.
- The design of the campus is a significant strength as it supports all aspects of the program.
- The structure of the school day has been designed to support all aspects of the school mission.

What areas of growth and/or recommendations does the school have in the overall program:

- The school is currently reviewing assessment practices across all grade levels. We are not in a place of consistency as we develop new methods of assessment.

- Communication of student progress is inconsistent as we develop new assessment practices and increasingly utilize Canvas for reporting.
- Although additional time has been provided to faculty for ongoing initiatives, there remains a concern that we are attempting too much change all at once.

The Arts

Section Writers: Erin Gabriel, Arts Chair, Emily Blackburn, Arts Faculty, Sarah Fitzpatrick, Arts Faculty, Caroline Jaap, Arts Faculty, Andrew Jackson, Arts Faculty, Bill Johns, Theater Manager, Mark Lotz, Arts Faculty, Mollie Montgomery, Arts Faculty, Steve Mraz, Arts Faculty, Danielle Troy, Arts Faculty, David Bennett, History Teacher (Resident Outsider)

Date Completed: November 2014

Each of the school's educational program components is effectively designed and implemented.

What are the goals for your program area?

The arts curriculum at The Overlake School is designed to inspire life-long involvement in and appreciation for the visual and performing arts. Our goal is to provide students with a broad spectrum of opportunities to develop skills that encourage divergent thinking and self-expression, and encourage students' abilities in perception, comprehension, creativity, and aesthetic values. The range of offerings includes drama, stagecraft/technical theatre, vocal and instrumental music, traditional and experimental two and three-dimensional visual arts courses, digital art making, and design classes. Participation in arts courses is mandatory at Overlake; the middle school has a designated arts block that runs throughout the year, offering them a choice in semester-long classes, while the upper school students take courses in more than one area of the arts in order to fulfill graduation requirements. This serves to encourage all students to explore disciplines that are perhaps new to them, as well as to allow for specialization and more in-depth study in a particular area of interest.

Outside of the academic day, our department offers experiences to the students in the form of art/music/drama clubs, project week options, the all-school musical, 5th grade/Beginning music ensemble electives, and the 5th & 6th grade play. In addition, our yearly ArtsFest in May showcases student art work and our student performers, with an evening full of activities and events for our community. We have a strong technical theater program, utilizing student leaders in various positions backstage and in the booth, for 3 to 4 productions a year. Lastly, Overlake students successfully manage the annual Benefit Concert, Open-Mic Night, and the Film Festival each year.

All of this is possible because of our school-wide commitment to educating the whole child, as well as support for an ongoing and broad arts education. Our students experience responsibility, excellence, curiosity, diversity, and compassion on a daily basis within our curriculum, and also outside of the classroom.

What, if any, curriculum and/or developmental benchmarks does your program use?

The Overlake Arts Department references the national and state curriculum standards in the arts as a baseline for curriculum development. Each discipline (Drama, Music, Visual Art) has created a list of essential questions that guide specific curriculum development from grades 5 through 12. Each sub-department has also developed additional standards according to the needs of our students, the

particular specialty (video, technical theater, or industrial design, for instance) and our overarching departmental goals that work within the mission of our school.

What is the process for making changes within your area of the program?

Departmental changes, or any shifts in course offerings, happen through ongoing department discussion and close collaboration among teachers, the department chair, division heads, and our registrar. The Arts department holds a unique position in our school because of the often public nature of our classroom projects and curriculum. This necessitates ongoing assessment of our place (and reputation) within the school community, how we are viewed by the public, and how we connect the ideas of public performance with the students' learning process. We strive to remain open to student feedback and interests, ensuring that we are staying relevant within the world of arts education and are appropriately challenging in our program offerings.

What research and information is utilized?

Members of the Arts Department take advantage of professional development opportunities each year, as resources and time allow. Collectively, we belong to several national and local associations related to our disciplines (AATE, ACDA, NAFME, EdTA, SPE, WMEA, NAEA, ASTA), which serves to strengthen our ties to state and national arts standards, and the ever-growing research affiliated with best practices. We also attend internal meetings related to our student population and divisions (MS/US) that inform our teaching and work with individual students.

Who is responsible for assessing your area of the program?

All teachers in the arts department participate in the school wide evaluation system with their division head. Our last departmental audit was in 2006-2007, and the next is planned for the spring of 2016. We are constantly self-assessing each area of our program (Art, Drama, and Music) in order to best serve the development and interests of our students from year to year. Student feedback is also taken into account through Overlake's student feedback program, held for different departments on alternating years. The department chair attends monthly meetings with the head of school, division heads, and other department chairs to discuss school-wide initiatives, projects, curriculum planning and assessment, hiring strategies, and any other relevant topics. She is responsible for communicating issues and topics to the department at meetings and facilitating feedback and discussions related to our program and the vision of the school.

What programmatic changes have taken place in the past five years? Why?

In the past five years, several programmatic changes have occurred. These were due to enrollment numbers, student interest, teacher expertise, and looking closely at our philosophy of arts education.

- Altered prerequisites in visual arts, due to the addition of more digital based curriculum (i.e. shift from strict prerequisite requirement to teacher approval, opening up more options for certain students);
- Addition of *Industrial Design*, *Advanced Studio Art*, *Music Appreciation*, *Sculpture/Architecture*, and *Theatre Experience* courses;
- Removal of *Dance* as a course-offering in middle school and upper school, while maintaining its presence through smaller units within Performing Arts, PE, and production-based classes;
- Addition of beginning strings and intermediate strings to help strengthen the middle school orchestral program;

- Changes to 5th grade music program;
 - Addition of general music for a more broad based introduction to music education;
 - Addition of year-long after school beginning music electives in band, choir and strings - providing an additional opportunity for our younger students after school (free of charge)
- Removal or addition of identical course offerings in a few subjects (4 sections to 3, 1 to 2, etc.)
- Addition of part-time Theater Manager position, to relieve teacher responsibility for technical supervision of our theater during the school day, and provide much-needed support of events that happen on a daily/weekly basis in that space.

What are the future initiatives for your program?

The very recent shift in teaching responsibilities due to the reduced course load initiative has provided more time for curriculum work, increased collaboration within the department, and greater potential for cross-curricular work with outside departments. In the future, we will continue to look toward flexibility in the middle school arts program to meet the interests of our students while still offering a broad variety of courses. Another area for consideration is the retention of our part-time teachers, who are essential to the breadth and depth of our department. In addition, space concerns continue to be challenging because some classes have very specific needs, so classes are often crunched for appropriate space. This leads to conflicts with class use, building/construction space, and the safety of people (faculty, students, staff), equipment, and our general community (entire classes of students, or divisions.)

What are the school's strengths in regard to the school's overall program:

- We offer a wide variety of classes that give students an opportunity to experience music, visual arts and theatre at an experimental level and at a challenging depth, based on their needs and interests.
- We have a distinctive, vibrant presence on campus that we sustain through positive communication and outreach in our community, public performances and rotating art installations. The school shows it values the work of our department by carving out in-school time for assemblies or events where the entire community can experience the work of students and faculty in the arts.
- Our teachers practice their arts outside of Overlake; many are working artists and performers with current or former careers in their disciplines. We utilize professional development as well as maintain relationships with professionals and other arts educators locally and nationally. This brings rich and current trends into the school and models the concept of “life-long learning” to our students.
- Having a designated Theater Manager has been a huge relief for our full-time teachers, and we are hoping for consistent support of this position for the future. A very specialized set of skills is necessary to properly and safely supervise this space and our students and staff.
- Our arts support group, Overlake Friends of the Arts (OFTA), is an incredible resource for our department. This group offers financial support for supplemental needs in our classrooms (including guest artists, equipment for special projects, or unique opportunities) and is instrumental in generating community-wide support and volunteers for our public events. The workforce of parents that volunteer their time and talents to our department is a

wonderful show of support, and we feel lucky to have such an organization raising money and donating their time on our behalf.

- The administration has been unwavering in their understanding and support of what the arts can offer students at Overlake. We are able to provide a quality arts education to our students because our administration genuinely believes in educating the “whole child” and that the arts are an essential part of that experience.

What areas of growth and/or recommendations does the school have in the overall program:

- Our ongoing need for storage space and additional building/construction space continues to be a challenge as it interferes with the spaces needed each day to effectively teach our classes. This has been problematic since we built the Fulton Performing Arts Center in 2000. We cut our proposed shop and construction area, and have lived for the last 14 years without a designated space for building, construction, and storage. This is a safety issue as well as a daily classroom issue (also referenced above.)
- Addition of publicity/outreach support person, or designated liaison between all of our events and the calendars, the website, ticketing, photography, publicity, press releases, etc. We simply do not have the time to take on these tasks, though we have managed to juggle many of them ourselves over the years with help from OFTA. We have begun to strategize how to better maintain a visible presence outside of our own campus, but have realized that in order to do our program justice we need assistance.
- Our program has grown to include Orchestra/Strings in both the middle and upper school, and they are currently sharing theater/choir/band space on a daily basis for lack of a designated classroom space. Some spaces for instrumental music can be shared; others are more difficult (i.e. storage space, zero period space.)
- We would like more time to develop our curriculum scope and sequence each year, as our department offerings tend to change or shift every spring during registration.
- Ideally, addition of Dance back into daily curriculum, if student enrollment and teacher course-load can accommodate it.
- Fulton Performing Arts Center Theater - Facility Upkeep Issue/Advanced Planning:

Our Theater seating, dimmer rack, and HVAC of the Fulton Theater has a life span that is waning (the HVAC is already obsolete but still functional). A crucial piece to have in place is advanced planning for these systems that are absolutely vital to the functionality of the theater; if they go out, we are in trouble given the very public and very high community demand of this theater space. These systems directly impact classrooms, production use, community use, and is typically a prime location where prospective families are greeted. If any one of these systems were non-operational, it would require time and great financial resources to ensure their replacement or repair. We would like to see consistent supervision and attention to the physical/technical needs of this building.

Documents Provided:

- School Calendar
- School Daily Schedule
- Arts Curriculum Description

English

Section Writers: Marian Sugano, English Chair, William Armstrong, English Faculty, Jenni Baldwin, English Faculty, Rachel Anne Bradbury, English Faculty, Nathan Edmunds, English Faculty, Sarah Gallagher, English Faculty, Miguel Llanos, English Faculty, Karen Mihata, English Faculty, Megan Vasavada, English Faculty, Mia Wall, English Faculty, Rebecca Moore, Librarian (Resident Outsider)

Completion Date: September 2014

What are the goals for your program area?

In accordance with the mission of The Overlake School, the goals of the English Department are to foster a love of reading; to develop critical and creative thinkers, problem solvers, and effective communicators poised to contribute to today's global society; and to encourage students to become independent learners for life. To achieve these goals, the Department guides students in developing their abilities to write, read, speak, and research with expertise. Literature is the tool through which students both enhance the quality of their lives through artistic appreciation and develop skills foundational to all other disciplines. The English Department promotes: 1) an appreciation of the intrinsic relationship between literature and culture; 2) an understanding of the role of the individual within the larger context of society; and 3) an ability to critique value systems.

Writing

Students are taught to produce clear, coherent, and articulate writing with mastery of conventions and effective vocabulary. Our teachers emphasize the iterative process of writing: brainstorming, thesis identification, outlining, drafting, editing, revising based on peer and teacher feedback, and only then publishing. Throughout the program students learn to write short essays, longer compositions, and research papers of ten to sixteen pages, depending on grade level. Students also have the opportunity for journaling and creative writing, including poetry and short stories.

Reading

Students read a variety of literature. The English program offers courses which explore various genres (epic, poetry, non-fiction, fiction), themes, periods (ancient to modern), and global perspectives. Students discuss, interpret, analyze, and evaluate fundamental works about the human experience. In the fifth and seventh grades, English texts are selected to enhance students' studies in their History classes.

Communication

Beyond writing, the English Department encourages students to become poised, articulate speakers through both oral and audiovisual means.

Research

Students become effective researchers capable of sorting through and authenticating the quality of information available in today's world and learn to incorporate this information into carefully crafted oral and written communications.

What, if any, curriculum and/or developmental benchmarks does your program use?

On a regular basis Department members consult and incorporate standards from NCTE (National Council of Teachers of English), California English Language Arts Content Standards, Common Core Standards, and Advanced Placement Learning Objectives. Faculty members rely on pedagogical frameworks such as Bloom's Taxonomy of Learning Domains and Carol Dweck's studies on metacognition and growth mindsets.

What is the process for making changes within your area of this program?

The need for departmental change is brought to light through a variety of sources such as student feedback, teacher observation and collaboration, consideration of best practices, changes in AP requirements, and continual work on assessment and curriculum development. Additionally, school site visits, Department Audits (conducted approximately every eight years), and administrative directives help inform our decisions and directions regarding change. Department changes are given careful consideration, as the goal of any programmatic change is to improve student development and experience. The general process for adopting change is through proposal, discussion, and conscientious implementation.

What research and information is utilized?

The Department utilizes information gathered from a variety of sources including publications such as listservs (AP and NCTE), blogs, journals, and texts related to pedagogy. Additionally, faculty participate in school visits, conferences, and professional development workshops to broaden awareness of best practices and new approaches to teaching. Within the Overlake community, the English Department works in conjunction with the library team to discover and utilize new material and resources.

Who is responsible for assessing your area of the program?

The English program is formally assessed by the Head of School, the Heads of the Upper and Middle Schools, and the Department Head. Additional external assessment occurs through an outside auditor. The Department conducts regular internal assessment, taking into consideration student course evaluations and teacher reflection.

What programmatic changes have taken place in the past five years? Why?

The Department constantly strives for excellence and promotes positive change, especially in conjunction with increased incorporation of technology (Canvas) and the recent shift to focus on assessment.

Shift in Program Approach:

- Change in assessment influenced by Backwards Design model (Essential Questions, Enduring Understandings) to align assessment with clear learning objectives
- Shift to more student-driven classroom experiences, including student generated discussion, peer teaching opportunities, digital collaboration, blogs, and principles of flipped design to include students more actively in their learning process

- Shift to enhanced student role in assessment in the Upper School through cumulative writing portfolios and self-reflection

Shift in Program Structure:

- Reduce class size for 9th and 10th grades to allow developing writers to receive more individualized teacher feedback
- Addition of AP Language and Composition course to include instruction in rhetoric, art of persuasion, and experience with nonfiction sources and support the two principal course goals of developing critical literacy and facilitating informed citizenship
- Intentionally coordinate themes with History Department to create a more cohesive and diverse humanities experience for Middle School students

Shift in Writing Instruction Approach:

- Increased rubric assessment at all levels designed to give students more specific and objective feedback and provide teachers with enhanced measurements of student growth
- More opportunities for one-on-one feedback via Writer's Workshop, US tutorial, MS study hall
- Enhanced metacognitive experience through cumulative portfolios
- More focus on annotation to improve students' ability to mine texts for appropriate evidence to enhance essay writing
- 9th and 10th grade program revision to carry over skill growth and maturation and provide a unified base experience for developing writers
- Experimentation with video/audio/digital feedback to explore effective methods of assessment
- Better definition, awareness, and communication to students of the importance of Academic Integrity

Shift in utilization of extra-departmental resources:

- Deliberate coordination with school library to promote increased use of library resources and librarians, use of book talks to supplement MS curriculum and enhanced work on Research Projects
- Deliberate use of Technology to advance and promote digital database use for Research Paper and Noodle Tools, student production of digital literacy, and better incorporate technology (Canvas, Smart Boards, Computers in classroom for writing, tablet pilot program/twitter/blogs), greater oversight/instruction on plagiarism through Turnitin.com, and use of online portfolios

What are the future initiatives for your program?

The English Department is considering future programmatic initiatives in several areas, including technology, professional development, and curriculum.

Technology

- Increased and more innovative use of Canvas (the online Learning Management System)

- Improved incorporation of technology to facilitate digital literacy and competency
- Graduated implementation of digital rather than physical writing portfolios
- Focused and interactive sharing of technology use in the classroom

Professional Development

- Dedicated and additional time for horizontal and vertical coordination of curriculum
- Structured and efficient time for collaboration with set objectives
- Planned peer observations (as well as work with Instructional Coach) within and across grade levels to diversify teaching approaches and to better scaffold curriculum
- Increased awareness of overlapping skills in other Overlake academic programs
- Intentional examination of English Department programs at other schools

Curriculum

- Consideration of diversity in adopting new texts and curriculum in line with the Overlake Diversity Strategic Plan
- Utilization of consistent assessment tools such as writing rubrics that contain common language and expectations
- Examination of assessment tools currently in use to determine if these tools align with the targeted skills and objectives, followed by change as necessary
- Construction of a spiraled scope and sequence for grades 5-12
- Reevaluation of Department curriculum (a.k.a. the “deep dive”) using Common Core Standards as a starting point for discussion

What are the strengths and recommended areas of growth for your area of the program:

The Overlake English Department’s greatest strengths lie in two principal areas: achievement of academic excellence and development of interpersonal relationships:

- Both English Literature and Composition and English Language and Composition Advanced Placement test scores rise far above national standards, noteworthy because the English Literature and Composition course is open to all seniors, with no recommendation needed.
- Appropriately challenging coursework prepares students for success in college writing, fosters critical thinking, and cultivates a lifelong appreciation of literature.
- Alumni surveys testify to a high level of preparedness for college-level writing, reading, and research skills.
- Programs such as Middle School and Upper School Writer’s Symposium attract nationally acclaimed authors
- Writer’s Workshop provides additional individualized writing assistance across disciplines.
- Collaboration with the Library team improves students’ understanding of the research process and provides more student access to local writers.
- Excellent student/teacher relationships continue beyond students’ Overlake experience.

What are the recommended areas of growth for your area of the program:

- Increase coordination and communication between grade levels to create a more cohesive and spiraled curriculum using Atlas as a tool
- Create clearer scope and sequence 5-12 which includes increased awareness of diversity
- Examine best practices through “curriculum deep dive”
- Align assessment tools with targeted skills and objectives
- Improve implementation of Backward Design (with both curriculum objectives and assessment)
- Reduce class sizes for grades 11 and 12

Documents Provided:

- School Calendar
- School Daily Schedule
- English Curriculum Description

Social Studies

Section Writers: Larry Metzger, History Chair (Retired Employee), Sara Baquero-Garcia, History Chair, David Bennett, History Faculty, Bob Bristol, History Faculty, Amanda John, History Faculty, Dave Parson, History Faculty, Tina Proctor, History Faculty, Kristen Becker, Learning Resource Specialist (Resident Outsider, Past Employee)

Date Completed: February 2015

What are the goals for your program area?

The Social Studies Department at The Overlake School aims to have students continuously develop their knowledge, skills and understanding of the human past and present. Our curriculum is designed so that students study a broad range of local, national and global topics, and learn to recognize the interconnectedness of people, places and events. This knowledge content is outlined in our descriptions of the core courses and electives.

In addition to teaching specific content, we also seek to help students develop the following sets of skills:

Communication

Writing

Students are formally taught a variety of forms of writing. They gain experience in synthesizing material, taking notes, and writing essays, research papers and creative pieces. In the middle school, students learn expository writing methods and, by Grade 9, they gain proficiency at writing thesis statements and topic sentences when responding to essay questions. By Grade 10 they are capable of producing sophisticated essays of up to 4-5 pages. While middle school students are asked to use various textual sources to support their theses, upper school students are required to select from a range of primary or secondary sources to support a viewpoint.

Speaking

Students share ideas in small and large group settings, make formal presentations to the class, participate in role plays and simulations, and occasionally take part in formal small group orals.

Research

Through all grades, students collect and synthesize material, and analyze findings. In middle school, we introduce them to the research process. They begin to evaluate sources and to synthesize responses in formal papers or presentations. At this stage we also teach them proper citation methods, including bibliographies. In the upper school we place further emphasis on formulating questions for research and analyzing sources for perspective, purpose and value. In Grade 10 students use all of these skills in writing a major research paper. By Grade 11 students are proficient at evaluating the value and reliability of particular sources so that they can better use those sources to build their own analysis of historical problems or controversies.

Interpretation and Analysis

In all courses, we ask students to consider issues and events so that they may gain insights, form opinions, and build confidence in expressing their thoughts. To that end, we ask students to consider causes and effects and to judge historical events with empathy. In the middle school, we introduce students to primary source material, including maps and other geographical tools, in order to broaden their sense of historical evidence and methods. In the upper school we teach students to assess the validity of evidence by analyzing the origin, purpose, value, and limitation of documents. Using those skills they are better able to consider multiple perspectives when constructing arguments.

Habits and Attitudes

We very much encourage good study habits by teaching students how to take notes, annotate reading, and break down longer projects into smaller stages. Through discussions, small group work, debates, and role plays we encourage students to be active learners, good listeners, and to articulate their views with confidence. In line with the school mission we also foster appreciation and empathy for diverse cultures and societies, both past and present.

What, if any, curriculum and/or developmental benchmarks does your program use?

The Social Studies Department does not rely on any single set of standards to guide the development of our program. In constructing our content and skills scope and sequence we have, instead, consulted a number of different sources, including the following:

- *National Center for History in the Schools: United States History Content Standards for Grades 5 – 12*
- *National Center for History in the Schools: World History Content Standards for Grades 5 – 12*
- *National Center for History in the Schools: Historical Thinking Standards*
- *World History for US All teaching units*
- The International Baccalaureate social studies program

What is the process for making changes within your area of the program?

What research and information is utilized?

In addition to school visits, conferences and professional development workshops the Social Studies Department works with the library team to discover appropriate material. The Department also uses information gathered from a variety of sources including:

- The following publications of the National Council for History Education
 - *NCHE Expectations for Teacher Preparation Programs: The Best Practices of Effective History Teaching*
 - NCHE [*Habits of the Mind*](#)
 - *NCHE Blueprint for Student Learning*
 - *Bradley Commission on History in Schools: Guidelines for Teaching History in Schools*
- The following materials from the *Stanford History Education Group*
 - *Reading Like an Historian* (document evaluation activities)
 - *Beyond the Bubble* (assessments of document evaluation skill mastery)

Who is responsible for assessing your area of the program?

The Head of School, the Heads of the Upper and Middle Schools, and the Department Head formally assess the social studies curriculum. Periodic visits by outside auditors give the Department additional feedback. Finally, the Department regularly evaluates its individual courses and overall program.

What programmatic changes have taken place in the past five years? Why?

Content

In the past 5 years the Social Studies Department has made the following changes in order to construct a more age-appropriate Middle School curriculum:

- Changed the 5th and 6th grade program from a two-year United States History sequence to a year of Ancient Civilizations in the 5th grade and United States History and Geography from the Civil War to the present in the 6th grade.
- Replaced a hybrid 8th grade Civics/Ancient History course with a Civics and Citizenship class

The Department also made the following revisions to the Upper School program:

- Filled a significant gap by adding a unit on World Religions to the 9th grade World History (500 – 1789) class.
- Added an elective on the Cold War to respond to student interest in a class on contemporary history
- Added an elective on Gender in the Modern World so that students would have an opportunity to study that important topic in depth.

Program Approach

- To create a more intentional and sequential approach to the teaching of historical thinking, the department has begun to use backward design to plan our courses and units.
- The faculty have increased use of rubrics to provide students with more precise and useful feedback and teachers with clearer measurements of student mastery of both skills and content.
- In addition to daily office hours, we have established a History Workshop program to give Upper School students more opportunities for one-on-one coaching.

What are the future initiatives for your program?

- Placing more emphasis on team planning by those teaching the same courses
- Continuing to refine our skills and content scope and sequence. In the middle school this would mean ensuring that certain common skills themes run through the curriculum at every grade level
- Developing common methods of teaching skills at each grade level

- Developing common assessment tools to ensure consistency in evaluating student work in grades 10 – 12
- Creating benchmark exemplars – sample papers – that we can put online and annotate for students

What are the strengths and recommended areas of growth for your area of the program:

Strengths

- Emphasis on skills and understanding rather than on content alone
- Use of the best resources available rather than reliance on standard texts
- Increased collaboration among members of the Department
- An excellent, rich curriculum taught by experienced, passionate teachers who care about their subjects
- Emphasis on active learning that challenges students to think deeply about the topics covered
- Working with students in a variety of ways – written , oral, visual, individual and groups
- Freedom to adjust our curriculum as we proceed to better meet student needs
- A variety of electives based on student interest

Opportunities for Growth:

- Working on ways to provide more student choice in assignments
- Incorporating more current events and more projects in the high school that extend the classroom so students are civically engaged
- Adding activities that incorporate other types of learning beyond reading and writing
- Initiating more intentional collaboration with other disciplines, especially Math, English, and Science, to create learning opportunities across the grade that mesh together and provide support for each other’s curricula
- Expanding our consideration of diversity issues to include more exploration of gender, poverty, ethnicity, and social class

Documents Provided:

- School Calendar
- School Daily Schedule
- Social Studies Curriculum Description

Mathematics & Technology

Section Writers: Wing Mui, Math Chair, Rhonda Andres, Math Faculty, Chris Border, Math Faculty, Eric Clifford, Math Faculty, Kathy Finkenstadt, Math Faculty, Geneva Hinchliffe, Math Faculty, Justin Morgan, Math Faculty, Shannon Pridgeon, Math Faculty, Denise Renno, Math Faculty, Sean Clark, Controller (Resident Outsider)

Completion Date: November 2014

What are the goals for your program area?

The Overlake School Mathematics Department's goal is to provide students with:

- the ability to interpret, model, communicate, and make decisions based on quantitative information
- the flexibility to extend their understandings of mathematics to solve complex, unfamiliar problems
- the skills, knowledge, habits, and confidence necessary for them to succeed in college and to pursue the career of their choice
- the appreciation of mathematics as a cross-cultural and cross-discipline tool for solving problems and describing our world

The goals of the Mathematics Department are influenced by and reflect the school's overall mission. In particular, all 5th and 6th graders are placed in undifferentiated classrooms to encourage the building of a coherent, compassionate, community before tracking begins in the 7th grade.

What, if any, curriculum and/or developmental benchmarks does your program use?

5th and 6th Grade

The fifth and sixth grade mathematics curriculum is guided by NCTM and Common Core standards. Additional guidelines used include standard pre-algebra textbooks and prerequisites for Overlake's algebra courses.

Algebra 1, Geometry, Algebra 2, Precalculus

The core high school curriculum in the mathematics program uses an internally developed scope and sequence, standard textbooks, prerequisites for college and AP Calculus, as well as national/industry standards, most notably the Common Core, as curriculum benchmarks.

Calculus

The Overlake School AP Calculus courses use the College Board Advanced Placement Curriculum Frameworks as benchmarks. The regular, non-AP Calculus course is based on the AP courses and standard college calculus curriculums, adjusted to accommodate the students enrolled in the course.

Statistics

The Overlake School AP Statistics course uses the College Board Advanced Placement Curriculum Framework as a major benchmark.

Computer Science

The Overlake School AP Computer Science course uses the College Board Advanced Placement Curriculum Framework as a major benchmark. Both the AP course and the post-AP Data Structures course were developed and are updated based on the curriculums of introductory computer science courses at the University of Washington, Seattle.

What is the process for making changes within your area of the program?

In general, potential changes are brought up during department meetings by faculty members. Following a period of discussion within the department and with relevant division and program heads, a decision is made by the division head(s) and the department chair. Major changes that impact the overall school program (such as the introduction of a new AP course) would require approval from the Academic Council and the Head of School.

What research and information is utilized?

The following is used to inform changes in the math and computer science programs:

- student feedback surveys
- student outcomes
- teacher reflections
- feedback from school administrators (division and school heads)
- professional development and outside research (via articles, conference presentations, etc.)
- feedback from outside auditors and NWAIS committees
- standardized test scores (SSAT, SAT, ACT, AP)
- informal survey of student interest

Who is responsible for assessing your area of the program?

The mathematics program of the Overlake School, as well as its teachers and department chair, is formally and regularly assessed by the Head of School, and the Heads of the Upper School and Middle School. External audits occur regularly (once every seven years) through an outside expert on mathematics education. The most recent audit was performed in 2010 by Tom Loveless of Brookings Institute. A copy of the audit report is attached as an appendix.

The department conducts regular internal assessment, facilitated by the department chair, taking into consideration the research and information listed in Indicator 14.C.i above.

What programmatic changes have taken place in the last five years? Why?

Per the recommendations of the previous NWAIS Reaccreditation Committee, the mathematics program made significant changes to strengthen the consistency between the 5th/6th grade and the 7th–12th grade programs. The 6th grade math position was changed from part-time to full-time, and a new full-time teacher was hired. Instruction time was increased in both 5th and 6th grade by splitting up mixed math/science classes into dedicated math and science classes. Starting in 2011-12, 6th grade math became a full-fledged Pre-algebra course. To further bridge the two programs the 6th grade course adopted a textbook that is aligned with the 7th grade text.

As a corollary to the change in the 5th and 6th grade programs, the department restructured its 7th and 8th grade course offerings starting in 2012-13 (2013-14 for 8th grade). Instead of taking Pre-algebra in 7th grade and Algebra 1 in 8th, students either took a two-year Algebra 1 course, or one year courses in Algebra 1 and Geometry. Pre-algebra was no longer offered in 7th grade.

To keep up with computing trends and student interest, the introductory computer science courses were consolidated from a Visual Basic course and a C course to a C#-based game programming course. In 2015 the course will be further updated to use Python as an introductory language.

Over the last two years the department has seen a trend of more students taking AP Statistics and Computer Science courses in their 10th or 11th grade years, as opposed to taking them as 12th grade electives. In response the department offered two new, post-AP courses (Reproducible Research in R, Data Structures) to give students opportunities for further study in statistics and computer science.

What are the future initiatives for your program?

As part of a full school initiative, the mathematics department is working towards improving our student assessment process, improving the quality of feedback for students, and re-examining our curriculum in the context of our current student population and the department's goals.

Additional department initiatives for the next five years include re-examining the role of technology in the math classroom as The Overlake School begins its Bring Your Own Device program, reviewing and improving our placement procedures for incoming students, and starting a summer Geometry course to open up opportunities for student acceleration.

What are the strengths and recommended areas of growth for your areas of the program?

Strengths

The Overlake School mathematics program has a strong, rigorous, core program designed to give the majority of our students exposure to calculus before they graduate from Overlake. There is a wide range in experience and expertise in the faculty, which is comprised of knowledgeable and professional individuals. Collaboration and communication among teachers happen frequently and deliberately. The department also offers a variety of electives in statistics and computer science in the upper school, meeting the interests and demands of students. In both the middle and upper schools, Overlake has active math clubs where students, advised by math teachers, participate in local and national math competitions. In particular, the upper school math club is student driven and run by a group of very enthusiastic students.

Areas of Growth

Currently, the math department is having limited success in tracking students longitudinally through their career at Overlake and there is no data on how Overlake graduates perform at the college level beyond anecdotes from visiting alumni. The department also has no means of assessing the program's success in the aspects of embracing diversity and fostering intellectual curiosity. Having this data would be helpful in assessing the effect of program changes and how well the department meets its goals and the school's mission.

Most Overlake math classes in the upper school are currently taught in a traditional, lecture format. While this is working well, the department is in position to explore other methods of teaching (e.g., flipped classrooms, project-based learning) to complement and enhance the current classroom experience for students.

Documents Provided:

- School Calendar
- School Daily Schedule
- Mathematics & Technology Curriculum Description

Modern & Classical Languages

Section Writers: Kelli Pleskac, Modern & Classical Languages Chair (Past Chair), Micah Orr, Modern & Classical Languages Chair, Motoko Abe, Modern & Classical Languages Faculty (Past Employee), Shawn Allen, Modern & Classical Languages Faculty, Sabine Friedman, Modern & Classical Languages Faculty, Manuela Garcia Luque, Modern & Classical Languages Faculty, Heather Jasper, Modern & Classical Languages Faculty, Trevor Layman, Modern & Classical Languages Faculty, Mireille Machefert, Modern & Classical Languages Faculty, Sarah Mansour, Modern & Classical Languages Faculty, Natalia Morales-Wiedmaier, Modern & Classical Languages Faculty, Chen Tang, Modern & Classical Languages Faculty, Limei Xu, Modern & Classical Languages Faculty, Ann Ewel, Director of Library Services (Resident Outsider)

Completion Date: December 2014

The Department of Modern and Classical Languages at The Overlake School represents four modern languages and the classical language of Latin. Although there is much that we have in common, there are also inherent differences between the instruction of our modern languages and Latin. For that reason, certain responses will be divided accordingly with answers that allow us to address these differences.

What are the goals for your program area?

The purpose of the Overlake Modern Language Department is to foster standards-based proficiency in a foreign language current with national standards, to promote cultural sensitivity, and to nourish a lifelong interest in and openness to languages and cultures. We subscribe to the belief that language learning is a fundamental component of a well-rounded education. We likewise believe that language learning promotes the Overlake school mission of embracing diversity, fostering a compassionate community, developing intellectual curiosity, teaching responsibility and inspiring excellence. Overlake students who complete our language program will develop cultural sensitivity and a willingness to embrace linguistic and cultural diversity by being able to think critically about the world around them.

The Overlake Latin Program strives for fluency in reading authentic ancient Roman authors in a variety of genres, as well as knowledge of Roman culture and history both as an end in itself and as a means of better understanding ancient literature as well as contemporary culture and history. We work to enhance student understanding of English grammar, vocabulary, and syntax, while developing analytical and critical thinking skills that benefit students academically across disciplines. Our program offers an early introduction to Latin beginning in fifth grade, after which point students may continue in our Latin program, or they may utilize their foundation in the study of language as they elect to join one of the other modern languages that are offered.

What, if any, curriculum and/or developmental benchmarks does your program use?

In the Modern Languages, The American Council of Teachers of Foreign Languages (ACTFL) and the AP exams serve as useful benchmarks for our curriculum. The ACTFL promotes the five C's: communication, culture, connection, comparison, and communities. We as language teachers endeavor to incorporate all of these elements into our curriculum. Language is not taught as an isolated entity, but rather it is integrated into real-world communicative tasks and cultural situations. We furthermore believe that success on the various AP exams is best achieved when the skills

required for those particular language exams are fostered as early as possible in the program. Moreover, Overlake modern language teachers have been proactive in their investigation of further benchmarks, attending numerous AP workshops and summer institutes, professional development seminars, and WAFLT (Washington Association for Language Teaching) conferences.

The Overlake Latin Program uses the standards outlined by the American Classical League's *Standards for Classical Language Learning*, the ACL's National Latin Exam, and the Advanced Placement course syllabus. Our scope and sequence is modeled on these sources' recommendations for content coverage and student assessment.

What is the process for making changes within your area of the program?

What research and information is utilized?

For Modern Languages, results on AP exams, departmental audits from outside experts every seven years (most recently in 2010), animated discussions within our department, regularly scheduled collaborative meeting time during the school day, extensive engagement with more modern assessment research (most notably the Understanding by Design Model) and the use of technology in the classroom have enabled us to adapt our curriculum to meet the new standards of modern language pedagogy. This includes a strong focus on oral communication competency. Students' enrollment choices also give us feedback about what courses are offered and what changes would be most beneficial to established courses.

Having undergone audits on the same schedule as the Modern Language Program, our Latin Program has modified course content and our scope and sequence in response to what our independent evaluator has suggested. We have also adapted our program to prepare students for the revised requirements of the Advanced Placement exam, implemented in 2012-2013. In this process, we have adjusted the AP course content and methodology in response to the required AP Audit, conducted in 2011-2012. Finally, our program uses student feedback in the form of course evaluations as well as administrative input.

Who is responsible for assessing your area of the program?

We promote a dynamic and flexible attitude towards language pedagogy. This means that we listen to many voices—those of administrators, students, colleagues, and outside auditors. Our teachers are primarily responsible for this assessment. We adjust the curriculum according to annual review of class progress and student need. Beyond this assessment, the school administration works with the department members to conduct a formal professional development process, which provides a further opportunity for reflection on curriculum and methodology.

What programmatic changes have taken place in the past five years? Why?

In 2008 the school changed the starting point for our formal language programs from seventh grade to sixth grade. Before that time, all students studied Latin prior to selecting a language track in the seventh grade. As a result, we are continually examining the scope and sequence for each language and making modifications that reflect the developmental needs of middle-school students. Our goal is to create a sequence of courses that enable students to gain age-appropriate levels of proficiency through careful pacing of content introduction that enhance learning. Every successive year we look for ways to better meet the goals of developmentally-appropriate and rigorous language instruction

at each level. Now that the language tracks begin in earnest in the sixth grade, allowing students to reach more advanced study in their final years, we are currently developing post-AP courses to accommodate juniors and seniors desiring further study in a language. In addition, to support student success in their performance on the AP exam, we have increasingly modified our curriculum throughout the scope and sequence to include materials that provide scaffolding for the skills tested at the AP level.

The introduction of a state-of-the-art language laboratory (Sanako Language Lab) and the increased incorporation of technology have allowed us to promote positive change in course content in the modern languages. Assessment of oral exams has become much more efficient thanks to the Sanako Language Lab software. Real emphasis has been placed on including authentic cultural materials in the classroom to better promote the five C's discussed above. Student assessment has been modified in recent years in connection to the large-scale shift in the school community around this topic, incorporating the principles of Understanding by Design.

The switch to a four-course load has provided the opportunity for productive collaboration among teachers across divisions within our department. Lastly, the establishment of a mentoring system and the addition of an Instructional Coach have made a significant improvement in the support of our teachers around these programmatic changes.

What are the future initiatives for your program?

We are developing a fully-articulated scope and sequence for all modern languages and levels. Such a document is a perpetual work in progress, insofar as our curriculum evolves with the times, but it provides newly hired teachers with an indispensable resource. The school is in the process of acquiring Atlas Curriculum Mapping software to aid in this endeavor.

The department has worked with the sixth grade starting point for over six years, and we now face the reality of students who are finishing graduation requirements in language at the end of tenth grade. Many students, however, are seeking new opportunities to continue their language study. Therefore, we are planning for the need to provide additional courses beyond AP at level VI.

We would furthermore like to pursue additional professional development opportunities in order to be at the forefront of language pedagogy, including national and regional conferences on language learning and increased peer observation (both at Overlake and at other area independent schools).

What are the strengths and recommended areas of growth for your area of the program?

Strengths:

As the faculty members of the Modern and Classical Language Department, we are dedicated, experienced professionals who believe strongly in personal and professional growth. We foster an excellent rapport with students and are experts in our disciplines. We are flexible and open to change, often willing to take on multiple preps that change year to year to reflect the amount of choice afforded to the students. The international composition of our department represents diversity at Overlake and promotes international understanding. These qualities in particular enhance a culture of professional growth and a willingness to embrace new concepts.

Specific to the modern language programs, our established relationships with partner schools in countries of the languages offered provide excellent opportunities for our students to meaningfully engage with native speakers in linguistic and cultural exchange. On a predictable rotation, our students are given the opportunity to participate in these exchanges, traveling to that country to use language skills in authentic contexts, later serving as host families for students from our sister schools to complete the cycle of the exchange. Many of these exchanges provide the opportunity for enduring international relationships for our students.

Our Latin program enjoys a clear, well-developed scope and sequence that reflects both high standards for student proficiency and a keen awareness of student development throughout the curriculum. We offer a flexible corpus of materials and resources appropriate to specific groupings of students depending on preparation and enrollment from year to year. There exists an enthusiasm and commitment by students, and teachers forge a community of learners dedicated to the language and the co-curricular programs offered (e.g., Roman festivals, National Latin Exam, Junior Classical League, etc.) Lastly, students of Latin can take advantage of our Ancient Field Studies Program, a guided exploration of the ancient wonders of Rome and Southern Italy where they form a personal connection between their years of classroom instruction and the real monuments of ancient civilizations.

Areas for growth in the Modern Languages include:

- Creating more interdisciplinary collaboration and collaboration between languages, with a schedule that supports this need
- Fostering a working rapport with a largely new language department faculty
- Developing a full scope and sequence and an institutionalized system of collaboration (as discussed above)
- Enhancing a stronger understanding by all faculty of the vertical articulation in the language they teach
- Establishing a greater presence within the Overlake community (presentations, cultural fairs, social language opportunities for the students outside of the classroom)
- Developing a stronger emphasis of the “communities” part of the 5 C’s in our classes
- Increasing engagement with languages represented in the Overlake community

Areas for growth for the Overlake Latin program include:

- Having scheduled time for collaboration and planning for events and activities involving both middle- and upper-school students
- Extra time for planning for advance-level courses with materials that complement and challenge diverse upper-school abilities and sensibilities
- Flexibility to assign courses to teachers in a way that takes into account teacher strengths and interest
- Adjusting our scope and sequence to ensure that middle-school students advancing from level C (8th grade) can succeed in Latin III (9th – 12th grade) alongside upper-school students
- Consideration of a new textbook sequence using the *Cambridge Latin Course*, which will require some time to process and implement

Documents Provided:

- School Calendar
- School Daily Schedule
- Modern & Classical Languages Curriculum Description

Physical Education & Health

Who was responsible for this section of the report? Sara Wilcox, Physical Education & Health Chair, Chris Berry, Physical Education & Health Faculty (Past Employee), Mike Hufstader, Physical Education & Health Faculty, Kerri Hunt, Physical Education & Health Faculty, Neal Iezzi, Physical Education & Health Faculty, Justin Prohn, Physical Education & Health Faculty, Amanda Lopez – Castanon, Food Services Manager (Resident Outsider, Past Employee)

Completion Date: October 2014

What are the goals for your program area?

In accordance with the mission of the school, the goals of the Physical Education Department are to help students develop physical competences so that they have the skills and knowledge to take responsibility for their lifelong health, fitness and recreation. To achieve these goals the department guides students in developing their physical skills and personal fitness, gaining knowledge of games from around the world, participating in outdoor activities, and embracing all group members to work as a team. Students in grades 5-12 are encouraged to discover, explore and challenge themselves to reach their full potential as a physical educated individual.

Skills

Sequential skill building allows students to learn at their own pace. Station work, partner practice, and small-sided games allow for maximum participation for an opportunity to learn. Students are encouraged and expected to take responsibility for their own learning through goal setting and to challenge themselves to learn skills, games and tactics.

Knowledge

Students are taught rules, strategies and history as it relates to each subject. They are encouraged to use this information to achieve personal goals, make healthy decisions, and learn the language of health, physical education and recreation. The depth and breadth of the program, which includes yoga, sports medicine, outdoor education, and recreational and lifetime activities, can inspire our students to explore activities that are part of a healthy lifestyle.

Fitness

Students learn to be responsible for their own fitness through the use of pedometers, heart rate watches, and self-assessment. Each class begins with fitness exercises meant to strengthen each student physically and mentally. Fitness testing helps students see progress and inspires them to achieve their personal goals.

Teamwork

Every class at every level learns and practices good teamwork and positive leadership. Sharing skills and knowledge, including every class member in a game, embracing the diversity of skills within a

team, helps to foster compassion and support of all members of the group. Offering “kudos” or encouragement to team members becomes a positive habit within the program.

Health

Overlake is committed to educating the whole child and health is a state of complete physical, mental, and social well-being, and not merely the absence of disease or infirmity. Knowledge informs healthy decision-making so the goal of the health program is to teach students to apply the skills and knowledge necessary for wellness independently beyond the classroom, leading to interpersonal, physical and professional success. All students learn first aid and CPR and can study sports medicine at the high school level.

What, if any, curriculum and/or developmental benchmarks does your program use?

- Fitnessgram
- National and State standards
- Audit by physical education expert every 7 years
- PECAT- PE curriculum assessment tool
- Medic First Aid & Accreditation for CPR & First Aid
- Backward design model
- Curriculum map + scope/sequence & handbooks (MS/US)
- Yoga-Ashtanga 8 limbs

What is the process for making changes within your area of the program?

The process for making changes is initiated by Physical Education and Health teachers individually and within sub-departments. Changes are derived from student interest, needs and program goals. New initiatives are further developed through student feedback, interdepartmental collaboration, best practices, professional development, departmental audit, assessment and curriculum review. The process for implementing changes includes proposals to the department chair, academic council, and administration.

What research and information is utilized?

- National Physical Education Standards (NASPE, PECAT)
- Society of Health and Physical Educators-Washington (SHAPE)
- Professional Development and Best Practices
- Recommendations from external audit
- Student and department surveys
- Resident, community or industry experts-in-residence
- Assessment and curriculum review by faculty

Who is responsible for assessing your area of the program?

- Head of School
- Heads of Middle and Upper Schools
- Department Chair

- External auditor (every 7 years)
- Student course/teacher evaluation

What programmatic changes have taken place in the past five years? Why?

Staffing

- Addition of one FTE Physical Education Teacher
- Addition of two part time elective department teachers (Sports Medicine and Yoga)

Course Offerings

Changes made due to student needs, increased enrollment, and expanding a variety of offerings:

- Addition of Sports Medicine
- Addition of Yoga
- Eliminated courses of Advanced PE and Dance (Due to scheduling conflicts with core subjects and decreased teacher class load)
- Addition of another Zero Period Comprehensive PE class
- Addition of 6th grade Physical Education section due to student enrollment (went from 3 sections to 4 sections)

Instructional Practices

Changes in pedagogy, student assessment, and technology have occurred because of school-wide and departmental initiatives:

Pedagogy

- Unit changes to meet the needs of our students and increase opportunity to experience and discover activities for a lifetime.
- Backwards Designs curriculum model (i.e. Essential Questions, Enduring Understandings)

Student Assessment

- Rubric development and implementation
- Portfolio
- Medals for individual learning

Technology/Learning Tools

- Heart Rate watches and Pedometers
- I Pads, apps, and video for student research, review, and assessment.
- Smart boards
- Canvas
- Computers and Television for Fitness Center
- Outdoor Education-new ropes course challenges

What are the future initiatives for your program?

- Research historical physical education content (tie it into what the students are learning in history classes; focus centered around diversity and societal changes)
- Compare national standards to Overlake's curriculum to see strengths, weaknesses and redundancy.
- Increase use of and training in Canvas for our teachers
- Increase time to coordinate and verify scope and sequence between grade levels.

What are the strengths and recommended areas of growth for your area of the program:

Strengths

The strengths of the physical education department and sub-departments have a spotlight on three different areas, which include kinesthetic awareness, non-traditional subject matter and leadership development:

- Focus on experiential learning
- Focus on leadership through student involvement in Overlake community events, student led outdoor trips, officiating team activities and upper school students working with middle school students on skills and safety
- Bringing in outside community experts to enhance units of study
- State of the art facilities and equipment to enhance each unit of study
- An emphasis on fitness and important fitness concepts
- Focus on hands-on and kinesthetic learning
- Education for our students/faculty/staff/administration on the importance of PE and physical activity during the school day
- Provides educational opportunities outside the classroom
- Students are provided a systematic sequence of opportunities to build skills through a variety of activities
- As recommended in the 2013 Audit, we have implemented intentional learning through the process of assessments and rubrics for students
- Interdepartmental communication, collaboration and camaraderie

Areas of Growth

- Continued Professional Development to stay at the forefront of changes in the physical education discipline
- Understanding best practices for each area-specific discipline
- Improve the use and experimentation of rubrics
- Improve implementation of technology in classes
- Investigation into additional health related courses for upper school students as noted in the 2013 department audit

Documents Provided:

- School Calendar
- School Daily Schedule
- Physical Education Curriculum Description

Science

Section Writers: Lisa Orenstein, Science Chair, Stephanie Belieres, Science Faculty, Gerald Blycker, Science Faculty, Brian Husted, Science Faculty, Michael Krumbholz, Science Faculty, Mollie Page, Science Faculty, Ashley Powel, Science Faculty, Bob Wood, Science Faculty (Past Employee), Kent Renno, Outdoor Education Director (Resident Outsider)

Completion Date: October 2014

What are the goals of your program area?

The goal of the Overlake School's Science Department is to prepare students with the skills and knowledge needed to develop a rich understanding of the practices that characterize the discipline, as well as the principles of biological and physical science. Students are exposed to successively more sophisticated concepts and experimental skills that allow them to investigate the nature and behavior of matter, energy, and living organisms

The Science Department's goal for middle school students is to provide them with as many opportunities as possible to investigate the world around them. We have sought to create a curriculum where students use the lab as the means of obtaining information about matter, energy and biological systems. In the upper school program, students work to develop an in-depth understanding of the principles and interrelationships that explain the natural world. In doing so, they experience the process of science at greater levels of sophistication so they recognize the importance of inquiry and the need to establish lines of evidence to develop, refine, and justify theories and models explaining the natural world.

The goals of the program have been developed with a keen eye to the nature of science and an understanding of how students learn. When establishing these goals we were mindful of the idea that "when learning science, one must come to understand both the body of knowledge and the process by which it is established, extended, refined and revised." (NRC, 2007, pg. 26)

What, if any, curriculum and/or developmental benchmarks does your program use?

The Science Department relies on a number of outside resources 1) to help in the development of the curricular content and 2) to gauge our effectiveness in this development and subsequent implementation. As curriculum development is a dynamic process, we have reviewed and used a number of different resources to help define and articulate our goals and to help construct the scope and sequence of subject matter. These include the National Resource Council's "Framework for K-12 Science Education," the NSTA's "Scope, Sequence and Coordination," the College Board's Advanced Placement curricular frameworks, and finally the 2014 Next Generation Science Standards.

The department also uses student achievement on Advanced Placement exams given by the College Board to assess the effectiveness of our program's scope and sequence. Finally, given that Overlake is a college preparatory school, we strongly consider the feedback we get from alumni who move on to study science in college to help gauge the effectiveness of our curricular choices.

What is the process for making changes within your area of the program?

The process for making changes occurs at two levels: the first involves the entire department and the second occurs within each division. The full department meets annually at the end of the year to review course content for relevance, student preparedness for moving forward, and course prerequisites for appropriateness. This review enables us to articulate the key learning objectives for each course and what students need to be able to do to see success as they move forward in the program. With these elements clearly developed we can work together to make any necessary changes to the scope and sequence to better enable us to help students reach the stated goals of the program.

Throughout the year division meetings occur where ongoing work in both curriculum development and implementation is done. This work allows for more immediate, albeit smaller, changes to be made as gaps and/or redundancies become evident.

What research and information is utilized?

Whether working as a full department or within division groups, the development and modification of our curricular goals and standards takes place in light of the school's mission and best practices in the realm of science education. The department works to ensure that we have a clear understanding of the nature of our students, as well as their overall academic goals with respect to science, as we develop and implement courses. This allows for ongoing modification of current courses as well as the development of new ones. As stated above we rely on the ongoing research in science education published by the National Association of Science Teachers and the National Research Council. In addition, we regularly examine the work of more focused groups such as the National Association of Biology Teachers, the education branch of the American Chemical Society and the College Board. Access to this information comes via subscriptions, conferences and workshops.

Who is responsible for assessing your area of the program?

The Science Department does not undergo any regular, formal evaluation of its curriculum, but does routinely gather information to help it self-assess the effectiveness of the program. The department chair, in collaboration with the US and MS Heads, reviews course offerings to ensure scope and sequence are being addressed and that each course has appropriate and clearly articulated prerequisites. At the end of every school year, department members meet to review program structure, course content and student development, identifying areas that need adjustment and/or modification. In addition, information from course evaluations completed by students and AP test scores help us determine whether the program goals and learning objectives are being met. Finally, routine collaboration between teachers during the year allows us to determine where weaknesses in student knowledge and skills lie and make small, but immediate changes to meet student needs.

What programmatic changes have taken place in the past five years? Why?

The changes that have taken place in the middle school concern course content, where more in-depth exposure to concepts of biological science has been provided to students. Prior to this adjustment middle school students worked with skills and content of biology in a very specialized way in the 5th and 6th grades. Thus, they lacked a necessary understanding of some very fundamental principles of biology, such as cell theory, energy production and flow through the ecosystem and

biodiversity. Adding these topics and linking them to concepts of chemistry presented in 7th grade has provided greater depth of study for these early students, as well as given them an opportunity to see the connections between these two disciplines of science.

The key changes made in the upper school program center around the AP program. The department has been offering the AP Biology, AP Chemistry, and AP Physics B courses for many years. However, over the last three years these courses have undergone major revisions in their curricular frameworks. In light of these changes the department decided to offer the AP Physics C course in place of the former AP Physics B (now AP Physics I and AP Physics II). This change enables us to offer a calculus-based physics course, something students have been interested in pursuing, as well as maintain a capstone physics course that gives students an opportunity to pursue college-level physics in high school. AP Biology, AP Chemistry, and AP Physics C are courses that require recommendation for enrollment. Consequently, not all students have access to these courses. However, there are many students interested in continuing their study of science after the required core courses, but in a manner that is more interdisciplinary in scope. For that reason the department added the AP Environmental Science course to its offerings.

What are the future initiatives for your program?

Currently, there are two initiatives on the table. The first concerns student assessment and the second involves curriculum. While proposed and initially developed independently, it is clear that there will be much overlap in the work required to explore these issues and create an action plan. The assessment initiative grew out of a need to more deeply evaluate student achievement so as to inform students of their academic development. We are currently experimenting with standards based grading to augment the more traditional omnibus grade format and plan to continue this work over the next few academic years.

We are currently working on the curricular initiative, termed “the curricular deep-dive,” and plan to continue in this work over the next few years. The department initiated this work by identifying the fundamental practices that characterize our discipline and therefore, form the scaffold for the overall program, as well as for each course. Connecting this to our work on assessment, we are currently working to develop assessment tools to evaluate and inform students about their level of achievement with these practices. Looking to the future, our curricular work will move on to explore whether our current program structure is the most effective way to meet the stated learning objectives, the educational needs of the students, and the school’s mission.

What are the strengths and recommended areas of growth for your area of the program?

The major strength of our program at the middle school level lies in the fact that it gives students the opportunity to experience science as a process. While a thorough understanding of the selected concepts is expected, emphasis is placed on the manipulation of these ideas, rather than on simply memorizing a collection of facts. Students enter the high school program with confidence in their abilities to be successful in the lab and with a solid foundation of essential concepts from the disciplines of biology, chemistry, and physics.

In the upper school one significant strength comes in the structure of the program. The interdisciplinary approach to the Lab Science core and Advanced Topics course allows us to present content and skills at developmentally appropriate times. It enables students to work with

fundamental concepts in a variety of modes in a single year as students learn to recognize the role these ideas play in units presented in each course. Finally, because the essential concepts, such as atomic structure, the nature of the chemical reaction, or genetics, are addressed at varying levels of sophistication throughout the program, teachers are able to present material in smaller units that make the acquisition of knowledge and skills by the students more successful.

Much of the growth the department is going to experience over the next five years involves curriculum development and assessment. Effective implementation of the initiatives involving this work requires access to current research and models. This necessitates participation in conferences, workshops and professional development opportunities. Therefore, the department recommends that the school maintain a professional growth budget that allows for routine (yearly) professional development for all members of the department. In addition, there are instances where more in-depth training is required in order to move forward with the kind of work desired, e.g. standards based grading. Therefore, we recommend that the school invest in these training opportunities for teachers. This will ensure that there is a common understanding of the goals and outcomes of these projects.

Documents Provided:

- School Calendar
- School Daily Schedule
- Science Curriculum Description

School Culture

Section Writers: Brenda Leaks, Middle School Head, Mike Davidson, Upper School Dean of Students, Bob Bristol, Upper School Faculty, Bob Wood, Middle School Faculty (Past Employee), Molly Hill, Parent, Maddie Home, Upper School Student, Trey Rudolph, Middle School Student

Dated Completed: June 2015

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

There is an intentional school culture. Describe the school's culture.

The Overlake School's student body, faculty and staff are diverse in many ways, but they have chosen to be part of our Overlake community because its culture and values match what they want from a school experience.

Ours is a culture of **achievement**, a culture of **involvement**, and a culture of **relationships**. It is also a culture that reflects our mission statement.

Culture of Achievement

In our culture of achievement, students are expected to live up to our mission statement's goals of excellence, curiosity and responsibility. Expectations are high in our community, and the pursuit of academic excellence is a core driver of our culture. The academic program is rigorous, and students take pride in their academic success and the hard work required to produce it. They also hold each other accountable for putting in a similarly high level of effort.

Achievement as measured by grade reports provides evidence that our students put in long hours both at school and at home to attain and display their learning. Enrollment and performance in Advanced Placement classes also shows how hard our students are willing to work at achieving in the most rigorous classes that we offer. In the classroom, our students have internalized the part of our mission statement that asks them to responsibly come prepared with the appropriate materials and having completed the work ahead of time that is needed to be an active and engaged participant in each day's lesson. They work on the mission goal of developing their intellectual curiosity by asking questions and making connections that push themselves, their peers and their teachers to think deeply about the topics at hand. In our community, responsibility for learning is shared; we trust our kids to challenge themselves, each other and the adults in the classroom to make the most of every learning opportunity.

Culture of Involvement

The quest for achievement extends beyond our academic programs, creating a culture of involvement. We believe in educating the whole child, and as such have built in opportunities for students to learn about themselves in a variety of spaces outside of the classroom. And, learn they do. For a school of our size, we offer an impressive amount of co-curricular programs, from clubs, athletics, and Project Week to arts, Outdoor Education and Service Learning. For all of those programs to be viable, our students have to participate in multiple activities. We don't have a group

of students who only play sports and another group that only does arts or coding or service. Our students are artists one season, athletes another season and community service providers the next. Many of our students are all three of those at the same time. This represents both a great opportunity and a growing challenge for our community, as our students sometimes find it difficult to strike a balance between their co-curricular commitments, their academic load, and their life outside of Overlake.

The school also asks our students to exercise responsibility by leading co-curricular programs. They are handed real opportunities to manage groups, plan events and run day-to-day aspects of our community life. Not surprisingly, our students generally surpass our expectations. From start to finish, they lead existing programs that are traditions of the school, including Mr. and Miss Overlake, the Annual Benefit Concert, and ASB dances, socials and other gatherings. They also improve the way that the activities of daily life come to life, such as weekly announcements, senior first day welcome, MS Green & Gold competitions and US grade-level competitions.

Culture of Relationships

Alumni of Overlake frequently tout the relationships that they have with their peers and with their teachers as one of the major high-lights of their Overlake experience. For a large percentage of our students, they call each other friend, classmate and teammate for six to eight years.

We use our formal systems of retreats, advisory and grade-levels to intentionally provide structure for our students (and teachers) to connect to each other. The most fundamental structure to promote relationships between students and between students and adults is our advisory system. Every Overlake student is part of an advisory group consisting of 8-10 students within the same grade and an advisor, who is usually a full-time faculty member. Middle school advisory groups change each year so that teachers of a specific grade can also serve as advisors to that group. Upper school advisory groups remain together for all four years of high school. Advisors monitor the academic and personal growth of students in their advisory group, serve as the first point of contact for parents, and advocate for their students in both academic and social matters.

Teams, clubs, performance groups and classes offer other opportunities for students to find what can be referred to as “groups of we” within our community. Within our larger school, each student has multiple groups that s/he belongs to and each provides an opportunity to make a connection to a group of peers. One student likely has the “we” of a grade-level, an advisory group, seven different classes, one to two teams, a project week group, an outdoor education group, a performance group, and one to two clubs. Those small connections and shared experiences within and beyond the classroom build into larger connections that help all of our students be known and to know each other. These small connections also facilitate a culture in which even those who are not the best of friends have a level of respect for the contributions that each makes to our community.

Our faculty and students have strong relationships, too. These are built because there is mutual respect between students and teachers. Our teachers don't rely solely on the authority that comes with being the adult in the room who is paid to teach. They have authority that comes from building relationships with students because they see them in moments of success and in moments of struggle, both inside and outside of the classroom. We foster those relationships by maintaining

small class sizes, having US students call their teachers and administrators by first name, and protecting space during the day for clubs and advisory.

New teachers to Overlake frequently comment that they have never had so many students say “thank you” at the end of class or inquire about the well-being of teachers and classmates with genuine interest. Our culture expects them to practice basic courtesy and respect both inside and outside of the classroom. These norms are taught explicitly through classroom, advisory, grade-level and school-wide programming that includes direct explanations of school expectations, fun and energetic activities that allow students to practice the expectations, school and outside speakers on community norms, discussions on readings and/or videos that illustrate the challenges associated with living up to community expectations, as well as a clear structure for responding to behavior that goes outside of the responsible, respectful and kind behavior that our culture demands.

Faculty & Staff Culture

Our Faculty/Staff culture is also strong and mirrors that of our student culture. Adults in our community work hard to achieve at the highest level. And, while we aren’t graded in the ways that students are, we hold ourselves and each other accountable to teaching engaging lessons, building strong relationships with both students and adults, and contributing to the larger community when possible. There is an expectation of continued growth that is supported structurally with the designation of in-service professional development days, the recent creation of increased collaborative time that is built into the school day, and a fund for outside workshops that is robust and highly utilized by adults within our community.

Faculty/Staff also model and contribute to our culture of involvement. Beyond the duties of the job, adults in our community contribute by being on task forces and committees, by coaching, and by being generally engaged in the daily life and strategic direction of the school. We don’t struggle to find volunteers to interview potential employees, to act in leadership positions within the school or to help out with special projects. Our Faculty/Staff understand that the life and culture of this school is built on the collective efforts of every one of us.

Finally, our culture of relationships is just as important for our adults as it is for our students. Given the spread-out nature of our campus, faculty and staff are most likely going to be deeply connected to people who do the same type of work that they do and work in the same spaces where they work. That makes it important for us to intentionally create opportunities for our faculty and staff to come together in large groups and to mix up in smaller groups. Some of the ways that we do that are by hosting full faculty gatherings at the start, middle and end of the school year for socializing, having regularly scheduled full community meetings, offering a meal allowance that brings every adult to the campus center to eat at least once a day, encouraging faculty and staff to work across grade levels and departments for project week, and supporting adults who want to coach and/or lead outdoor education trips.

How does the school help new and veteran members of the school community understand and contribute to its culture?

Overlake is thoughtful and deliberate about the way it welcomes and integrates new members to the community.

Faculty & Staff Induction

All new faculty and staff report to school for a three-day orientation program in August before the returning faculty and staff join them for pre-service days. During this time they receive extensive training on our technology and our Canvas learning management system, time with administrators and support staff, as well as time set aside to spend with their assigned, veteran-faculty mentors. All faculty new to Overlake are assigned a mentor from within their department, with whom they meet formally and informally during the first semester to discuss issues big and small.

Over the course of their first year, the entire new faculty cohort meets monthly after school with administrators to cover key topics before they come up in the year and to help them through any cultural or logistical questions as they make their transition. New faculty also receive regular feedback from classroom visits by the MS or US head.

Student & Family Transition & Orientation

New students and their families are first welcomed to the community with an Admitted Students Reception in the spring. Over the summer, parent ambassadors in each class reach out to new families and invite them to class events. Over the course of the year, new families are integrated into the community through class potlucks and coffees put on by the PFSA.

All new students are on campus the Friday before the first day of school for New Student Orientation. This includes our entire freshman class, considered new students as they transition from middle school to upper school. In the first week of school, every grade level spends Thursday and Friday on a two-day retreat away from school, which is a great way to integrate new students and help build new friendships.

There is a strong correlation between the stated mission of the school and the culture that exists in the school.

How does the school's mission influence the school's culture?

At Overlake, we are fortunate to be guided by a mission that is clearly stated, embraced by all members of our community, and directly guides the culture of the school. In fact, it was the existing culture of the school that guided the creation of the current mission.

*Inspire excellence. Develop intellectual curiosity. Teach responsibility.
Embrace diversity. Foster a compassionate community.*

The wording of the mission highlights the dynamic tension within the school that constantly forces us to strike and re-examine the balance between ideas that are important to us. Determining the proper balance between excellence and compassion or between curiosity and responsibility is a constant source of debate within our school community, and that very debate is central to our school culture.

The relationship between specific aspects of our mission and the day-to-day culture of the school are provided above in the response to question one.

The school’s culture promotes free and open inquiry. Describe the ways in which the school’s culture creates an environment that enables students to engage in respectful exchanges of differing viewpoints and to express their ideas on all subjects. Provide examples representing the different divisions of the school.

In Overlake’s classrooms and its co-curricular offerings, providing an environment that allows students to feel safe and supported in being who they are and expressing what they believe is central to our mission and our culture. In the classroom, lessons are designed to ask students to form and express a point of view on controversial topics, and then to teach them to react constructively when those views are questioned by peers and teachers. In a sixth grade debate on the decision to intern Japanese-Americans in 1942, the teacher acts as a moderator, as the student discussion continues into the hallway after class they realize they never really learned where their teacher stood on the issue, since revealing that “right” answer would have crippled the debate. Upper school students in a Graphic Design class create and publish powerful posters taking a stand on social and political issues, designed to evoke some controversy.

Students also use our co-curricular program, particularly clubs, to express their views and ideas. Some clubs are geared specifically to fine tuning student abilities to express themselves and their ideas: Junior Statesmen of America, middle and upper school Debate, Model UN, and Mock Trial, for example. In other clubs, the goal for students is to educate others about ideas that are important to them, or to raise the level of respect and acceptance of different groups on campus. Our Alliance Club was a driving force this year behind the move to gender neutral bathrooms in most of our buildings. Our Gender Equality club has partnered with administrators to sit down and rewrite a clearer, more modern dress code. Our IMPACT Club began a series of “Diversity Lunch Time Discussions” that covered challenging and controversial issues and allowed space for opposing viewpoints.

What are the school’s overall strengths in regard to school culture:

- The school has a clear, accessible mission that explicitly informs school culture and values.
- The school grants students at all grade levels a high level of respect, as evidenced by the level of trust and responsibility they are given.
- The school’s broad spectrum of high quality programs in academics and co-curriculars and graduation requirements across both create well rounded students willing and able to take risks in areas outside their strengths.
- The school successfully provides a safe, caring, inclusive environment where students are able to be themselves.

What areas of growth and/or recommendations does the school have with regard to school culture:

- As our academic and co-curricular offerings continue to expand, the school must help students find balance between their academic pursuits and expectations, their co-curricular commitments, and their physical and mental health.

- As the school approaches its 50th year, it must negotiate the increased formality, risk management and bureaucracy that come with being a more mature school while maintaining the more student-driven, informal and spontaneous aspects of our culture.
- Continue to improve the way we welcome new students, parents, faculty and staff and integrate them into our school culture.

Commitment to Diversity

Section Writers: Mark Manuel, Director of Diversity (Past Employee) & Randi Hedin, Board Member

Completion Date: February 2015

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

The school’s overall program provides students with a school experience that is in keeping with the school’s commitment to diversity.

How does the school define diversity for itself?

The Overlake School defines diversity broadly. Not only a simple matter referring to differences, diversity is inclusive of a broad set of cultural identifiers that include but are not limited to race, ethnicity, religion, sexual orientation, geographic region, socioeconomics, age, gender, and learning styles. The nuance of diversity is continually fluid and contextual and often refers to the relationships between minority and majority populations in regards to accessing power and resources. Often these are explored through issues of human relationships, history, and desire for equity.

The description below articulates how The Overlake School “Embraces Diversity” as stated in its mission. This is based on faculty and staff survey responses completed in 2013.

Promotes Inclusion and Understanding

- By valuing the background, culture, personal history, and experience of every individual.
- By empowering each individual to be his or her authentic self, included, respected, and supported.

Broadens Student Perspectives

- By uniting diverse individuals with different cultures, beliefs, and stories to enhance the life-long process of understanding the world around us.
- By exploring our similarities and differences through the academic curriculum and experiential learning opportunities both inside and outside of the classroom.

Acquires Cultural Competency Skills

- By learning together and from each other, both students and adults can explore new realities, and challenge stereotypes, working to become global citizens.

Creates a Diverse, Healthy Learning Environment

- By fostering personal, physical, and emotional safety for all members of the community in all areas of school life – academic, personal, and social.
- By working towards civility, compassion, and moral values through learning initiatives aimed at educating our students to be successful, culturally competent citizens in a rapidly changing global society.

Promotes Advocacy, Access, and Social Justice

- By inspiring a desire to effect positive change through a real understanding of both the hardships and the institutional and social inequities faced by all marginalized people.
- By providing access and opportunity for young people from all backgrounds.

Describe the school's commitment to diversity.

The Overlake School's Commitment to Diversity (created 2005)

The Overlake School community is committed to being inclusive of all of its members while preparing students to effectively and productively participate in a global and multicultural world. Our curriculum and community honor a variety of traditions, value a diversity of cultures, and respect the contributions of all people.

At Overlake we challenge one another to examine the dynamics of diversity from a global/multicultural perspective so that we can become responsible citizens dedicated to social justice and service learning. We strive to provide a safe place for students and faculty to step out of their comfort zones and discuss issues of race, ethnicity, gender, religion, socio-economic status, sexual orientation, learning style and disability. By exploring the dynamics of our diverse world and nation we believe our students will be responsible citizens long after leaving Overlake.

How does the school go about fulfilling and assessing its commitment to diversity?

The Overlake School demonstrates its commitment to diversity in a number of different ways. Although not exhaustive, below are key examples through our Diversity Strategic Plan (DSP). The Overlake School has a full-time Director of Diversity focused on fulfilling the vision laid out in the DSP. The Director of Diversity makes monthly reports to the Board-Chaired Diversity Committee on progress, challenges, and opportunities. Presentations are also given to the Board of Directors to ensure that forward progress is achieved. We also administer an annual diversity survey to 8th and 10th graders and plan on compiling this data during the summer of 2015. DSP Goal #2 student outreach and #3 diversity hiring are elaborated in other sections of this document.

Diversity Strategic Plan (DSP)

A significant portion of the energy and resources dedicated to diversity at Overlake are driven by the current Diversity Strategic Plan. The development of this plan was a year-long process and included a consultant, and diverse group of parents, administrators, staff, and faculty. This plan was approved by the Board of Trustees in 2012 and includes six major goals. Each goal has a

corresponding action plan with associated outcomes. Some of the goals have corresponding sub committees that meet regularly to discuss the issues, articulate progress or lack of progress, and form collaborative partnerships.

These goals are as follows:

The Overlake School will establish a defined set of core competencies and key knowledge related to cultural competence.

The Overlake School's commitment to cultural competence is grounded in our goal of preparing students to become responsible and active participants in an increasingly multicultural and global world. We recognize that cultural versatility is a combination of a strong knowledge base, skills and experiences.

Progress

A subcommittee was formed to research and review various Multicultural Education models and cultural competencies. Drawing from the Teaching Tolerance's Anti-bias work created a Multicultural Education framework for Overlake. This framework will be rolled out to department chairs and the general faculty in March/April 2015.

We aspire to reflect our Eastside community in our student body with a particular focus on increasing enrollment of mission appropriate students from under-represented groups.

Students benefit from an environment of peers whose perspectives and experiences differ from their own. Open dialogue, depth of intellectual exchange, and mutual respect can be fostered with a diverse learning community. We seek strong students who would otherwise not see Overlake as a viable option.

We aspire to provide sufficient financial aid to eliminate financial need as a barrier to our diversity goals.

Financial aid is a necessary tool that allows us to make an Overlake education accessible to a wider range of deserving students. We recognize socioeconomics as an important aspect of diversity and our aim is to sustain a mutually-beneficial partnership between the school and the community at large.

Progress

Part of the School's new Strategic Plan is to embark on a 4 million dollar endowment campaign to fulfill the promise of financial aid and cover 100% of demonstrated financial need.

Overlake aspires to hire and retain talented faculty, staff and administrators who contribute to the diversity of the school.

It is imperative that our faculty, staff and administrators reflect our commitment to diversity and to the new demands of an increasingly diverse learning community. A diverse group of faculty, staff, and administrators can help provide opportunities to directly participate in vibrant, pluralistic, multicultural learning initiatives.

Overlake aspires to be an environment where all students experience a sense of belonging and comfort in expressing themselves, their ideas, and their opinions.

To fully benefit from diversity, the Overlake School needs to maintain a focus on building an inclusive and open community. Personal, physical and emotional safety are requirements for a healthy learning environment.

Progress

We continue to increase collaboration between the Director of Diversity, Dean of Students, and Personal Counselors to ensure a safe and supportive learning environment. We have jointly worked on Community Time Sessions, MS MLK Assemblies, theme based projects, and meet weekly to discuss student issues. Our work covers inclusiveness and school climate.

The school will work intentionally to create a welcoming and inclusive environment especially for those in our community who identify as LGBTQ (Lesbian, Gay, Bisexual, Transgender and Questioning).

Students who are perceived or identify as LGBTQ face a disproportionate number of risk factors. Research shows when these students face harassment the impact of these risk factors are amplified. We want all of our Overlake students to feel safe enough to be authentic and supported.

Progress

We are working with an outside consultant that has reviewed our 8th grade health lesson on gender and sexuality, supported our student clubs, and is reviewing our policy and practices to be inclusive of LGBTQ issues. We have created gender neutral bathrooms, had outside speakers on the topic, and hosted an in-house faculty and staff professional development training on “Rethinking Gender and Sexuality”.

Board of Trustees Commitment to Diversity:

The Board is fully committed to the DSP having approved it in 2012. The Diversity Committee makes periodic presentations to the Board regarding new and existing diversity initiatives, updates on progress, and discussions on challenging obstacles.

The Diversity Committee is chaired by a member of the Board of Trustees and is composed of faculty, staff, parents, and administrators. The Committee meets once a month and ensures the implementation of the Diversity Strategic Plan, monitors long-term program goals, and reviews multicultural education efforts. This group also deliberates complex diversity issues and provides recommendations to the administration.

The Director of Diversity serves on the Administrative Team, and reports directly to the Head of School. In both venues the Director provides updates, progress, and challenges that represent the progress made with the plan.

A Diversity Survey is administered to Overlake students to help us understand how well we are “embracing diversity”. We administer the survey annually to 8th and 10th graders which are broken down into three sections.

- Measure sources of diversity within our student community (politics, religion, sexual orientation, etc.)
- The degree to which students feel the Overlake School is a “safe place” to develop and discuss potentially controversial ideas.
- The effectiveness of programs and activities provided by the Overlake School to engage our students in areas of diversity.

We completed an analysis of our survey in 2010 and plan to do another in 2015.

The school has defined what constitutes a diverse student body in accordance with the school’s mission and its geographic community.

This is driven by our DSP Goal #2 regarding student outreach. We aspire to reflect our Eastside community in our student body with a particular focus on increasing enrollment of mission appropriate students from under-represented groups. Please see supplemental materials that include:

- Historical trend of student diversity at The Overlake School from 1998-2015
- Breakdown of underrepresented groups of The Overlake School from 2000-2015
- Student diversity comparison of selected schools in our catchment area

Selected Recent School Efforts

- Completed data review offering us a sense of student demographics of our Eastside communities.
- Created a nine person outreach team made up of students, parents, faculty, staff, and administrators.
- Developed outreach and recruitment plan for the 2015 school year.
- Connected with over twenty five service-based providers, community leaders, and City officials in the area and hosted campus tours for our community partners.
- Hosted the Jack and Jill “School Daze” Admission Fair at The Overlake School
- Participated in the Puget Sound Independent Schools (PSIS) Admission Fair for Families of Color
- Provided presentations during site visits for community centers and leadership program
- Created Overlake’s Spanish language flyer and provided to community partners
- Spanish commercial to be shown on Univision

The school makes a concerted effort to address the issue of diversity through hiring and training of staff appropriate to its mission statement and its definition of diversity.

This is driven by our DSP Goal #4 regarding hiring. Overlake aspires to hire and retain talented faculty, staff and administrators who contribute to the diversity of the school. Our goal is for the percentage of diversity of our adult population to reflect the percentage of our student body.

Currently our adult diversity is at 15% and our student population is at 30% as defined through our EEOC reports.

Selected Recent School Efforts

- Led the formation of a Diversity Recruitment and Hiring Collaborative with six NWAIS schools in the area. This group works to improve their schools' diversity hiring process by sharing resources, best practices, and professional development opportunities. We will work with NWAIS to explore how they can support this work.
- Completed The Overlake School Minority Hiring Plan
- Prior and during hiring season we set regular meetings with the Head, Division Heads, Dean of Students, and Director of Diversity focused on diversity hiring.
- All school personnel responsible for hiring at The Overlake School completed a training with Warren Reid, Founder and Director of Nemnet, called "Overcoming obstacles to recruiting minority teachers, administrators and coaches."
- Signed up with recruitment firms; Nemnet, Calwest, and Carney Sandoe
- Built a list of prime sites and contacts to reach out to and share our employment openings
- Systematized a hiring process that will be part of our regular hiring practices
- Proactively searching for potential candidates

Professional Development

We value the idea that our students and adults are life-long learners. Throughout the year the Director of Diversity disseminates diversity focused professional development opportunities to our faculty and staff. We have also set up professional development workshops at the school for greater convenience and to reach a wider internal audience.

Recent professional development workshops and conferences faculty have attended

- Islam, Gender, and the Middle East in Global Context
- Gender and Sexuality Diversity with Dr. Jennifer Bryan
- Overcoming Obstacles to Retaining Minority Teachers and Administrators
- Implicit Association Test
- Retaining Minority Faculty and Staff
- Delivering Cultural Competency in Curriculum and Program
- Where there be Dragons "experiential learning through travel abroad"

Recent professional development opportunities provided at Overlake

- Overcoming Obstacles to Recruiting Minority Teachers, Administrators, and Coaches
- Creating an LGBT inclusive school climate (All faculty and staff)

What are the school's overall strengths in regard to the school's commitment to diversity?

“Embrace Diversity” was included into The Overlake School’s mission statement and created the Director of Diversity position in 2003. In 2005 the Board created the Diversity Committee chaired by a trustee. Successful completion of the Board-approved Diversity Strategic Plan provides us guidance on where to direct our energy and resources. Examples of Overlake’s overall strengths in regard to the school’s commitment to diversity include the following:

- We are actively working to systematize our Diversity Hiring Process, Multicultural Education Framework, and Student Outreach Plan.
- We built a safe community that values inclusion.
- The multiplicity of multicultural programs can be found in both experiential learning opportunities (service learning and project week) and in the classroom.
- Numerous school assemblies and public programs have featured presenters that bring to life diversity issues including topics on immigration and identity.
- Our ability to have engaging and thought provoking discussions on challenging topics in the student body enriches the learning environment.
- The public nature of our commitment has helped infuse the importance of this work into our culture. This has also had bearing on our student population which is at the highest percent of students of color.
- A full time Director of Diversity provides consistent advocacy, support, and energy in moving diversity goals and objectives forward.

What areas of growth and/or recommendations does the school make with regard to its commitment to diversity?

Despite substantial advances we have much room to improve and grow. Listed below are some areas that we feel could be helpful in improving our capacity and impact.

- Enhance the financial aid budget so our offer of admission provides 100% of demonstrated need to include ancillary costs
- Strengthen opportunities for parents and students to enhance their diversity awareness and to become better informed on diversity activity at The Overlake School
- Ensure that families of students feel comfortable and welcome at The Overlake School
- Increased coordination between Director of Diversity and the Admissions Department to strengthen diversity outreach efforts
- Designate a budget line item and funding for diversity outreach for hiring
- Move students from diversity awareness into action-oriented experiences using the skills and knowledge to make an impact
- Balance diversity efforts between Upper and Middle School: including but not limited to MS clubs, guest teaching, and overall MS programming
- Explore the opportunities, benefits, and costs to build public-private partnerships
- Investigate how the new summer school program can support diversity efforts
- Include issues of class and socioeconomics in the conversation with students and adults

Documents Provided:

- The Overlake School’s Non-Discrimination Statement(s)

Institutional Leadership

Section Writers: Matt Horvat, Head of School, Chris Williams, Board President, Meghan Waddle, Accreditation Chair, Randi Hedin, Secretary of Board, Debbie Black, Board Member and Past Board President

Completion Date: June 2015

STANDARD: 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.

The institutional leadership of The Overlake School is shared between the school's Board of Trustees (BOT) and the Head of School (HOS) in conjunction with the administrative staff. Major decisions about the school's future and long-term direction are decided by the BOT and then acted upon by the HOS. The relationship between the BOT and the HOS is based on trust and respect.

The Overlake School BOT is charged with ensuring the overall long term health and stability of the school. The BOT has the legal authority as trustees of the school, as stated in the Board's bylaws section Article three section 3.1 (bylaws are located in the appendix). These bylaws were adopted in 1989, updated in 2012, to reflect changes in the law and best practices and have not changed since then. The secretary of the Board ensures that the bylaws are adhered to and may recommend to the Board any changes or adjustments to the bylaws. The BOT currently operates in a manner consistent with the bylaws.

The Board's main responsibilities are as follows;

1. To determine and guide the mission, character and culture of the school
2. To ensure the school has the financial resources to meet its short and long term financial commitments
3. To hire, manage, and evaluate the HOS
4. To identify and plan for any long-term challenges the school might face

These responsibilities are discussed at the orientation for new board members and are reiterated at the first board meeting each year.

The Board President and the HOS meet weekly. These meetings offer an opportunity for the president to learn about what is occurring at the school, to review any challenges that the HOS is facing, and develop long-term strategies. Additionally, these meetings provide the opportunity to review the Board agenda and to discuss upcoming HOS reports to the Board. Finally the meetings allow the president and the HOS to strengthen their working relationship and to ensure that there is an open line of communication.

The Executive Committee (EC) of the Board is a subgroup of the Board that provides support and guidance to the HOS. The EC are the officers of the Board - the President, Vice-President, Secretary, and Treasurer. From time to time the EC also has an additional member-at-large. These officers are elected by the full Board each year at the final Board meeting of the year. The EC meets once a month, usually one week before a Board meeting. At the EC meetings the HOS reviews the Board agenda and presents information for the next Board meeting. The EC provides feedback to the HOS and reviews issues the larger Board might raise. The EC also discusses various issues the school may be facing and will provide their recommendations to the Board on these issues. Much like the Board President, the EC works with the HOS to ensure the school is meeting its mission. The officers are supportive of the HOS and work in a collaborative spirit with each other and the HOS. The Board President, the EC, and the head of the Board's Personnel Committee decide on the HOS compensation based on performance against the previous year's goals.

The Board of Trustees (BOT) is made of volunteers, largely past or present parents, who bring to the Board their expertise in an area helpful to the school. Currently the Board has members with backgrounds in law, personnel, construction, technology, finance, investment, diversity and fundraising. There are currently twelve voting members of Board and three ex-officio members. The size of the voting Board is set forth in the bylaws. The ex-officio members are Alumni President, HOS and the Parent Faculty Staff Alliance President (PFSA).

The Board meets eight to ten times per school year. The agenda for these meetings is drafted in the summer and then reviewed throughout the year by the HOS and the EC. A key focus for these agenda items is ensuring that the Board is fully informed about the school. The agenda items for a Board meeting are emailed to Board members several days before a meeting along with the minutes from the previous meeting. Board meetings are held mid-week, in the evening, and generally last two to three hours. These meetings offer the opportunity for all members of the Board to ask questions and engage in vigorous conversation. Board members know that discussions at Board meetings are generally confidential. The spirit in the room during Board meetings is best described as "disagree in private, fully agree in public." Board members see themselves as spokespeople for the school.

The Board also has several committees which meet during the school year. These committees are charged with completing work on behalf of the school. Committees may report back to the Board on their work. The current committees are: Buildings and Grounds, Development, Diversity, Finance, Investments, and Personnel. There is an Enrollment Management committee that meets only on an as-needed basis and a recent ad-hoc committee on Technology. These committees are composed of community members with experience in the relevant field, faculty and staff and are chaired by a Board member.

Part of a committee chair's responsibility is to evaluate and identify the members of their committee who are potential new Board members. Qualities a chair looks for are attendance, preparation, participation, attitude at the meetings and how the possible candidate is viewed in the school community. In addition, a chair may look for candidates with particular areas of interest and expertise that can be of value to the school, to the work of the committee and potentially the BOT.

This process requires the committee chairs to continue to add new members to his/her committee. Once a person is identified as a possible new Board member, the committee chair nominates them to the EC. If the EC supports the candidacy, it will then recommend such a candidate to the full Board, who will vote on whether to make the candidate a Board member. There have been rare exceptions to this process of adding new members to the Board but these exceptions have occurred in recruiting people who have no affiliation with the school. The most recent example was a local pediatrician who did not serve on any committees. This member did not have any relation to the school other than treating patients who are TOS students but offered an area of expertise that the Board and school were seeking.

Board members may serve up to three three-year terms, with the possibility of additional terms after a one-year hiatus from the Board. Each new Board member attends an orientation before the first Board meeting where new members are given a copy of the *NAIS Trustee Handbook* and are oriented on what it means to be a member of the Board including responsibilities and ethics. Minutes are recorded at all Board meetings and committee meetings (and approved at the next Board or committee meeting) and are maintained at the HOS's office. At the start of each school year all Board members sign a conflict of interest policy (attached in appendix). Board members are expected to support the development efforts of the school at a level that is comfortable for them with 100% participation expected from all Board members. Currently the Board does not have a process in place for self-evaluation.

There is a Board section of the school's website that gives an overview of the Board's work and identifies the members of the Board. Board members are listed in the school's directory. All Board meetings are listed on the school's calendar and are open to the community. Board meetings usually include an open session followed by an executive session, limited to only the voting members of the Board and their invited guests (which frequently includes the ex-officio members and the Business Manager) to discuss sensitive and confidential issues.

The Board delegates to the HOS the authority to manage the day-to-day operations of the school. The HOS is the BOT's only employee. The Board reviews the HOS work and evaluates the HOS based on the goals established the previous year. These goals are drafted by the HOS and the Board and refined as the school year begins. The HOS supports the Board by providing information to the Board about the functioning of the school. This information is contained in the monthly report produced by the HOS for the Board meetings and in various other ancillary reports that the HOS may present during Board meetings.

This past year the HOS drafted a three to five year strategic plan and presented this plan to the Board at an October retreat. After adjusting the plan based on the Board's feedback, the HOS presented the plan to the faculty and staff, parents, and alumni for additional feedback. After honing the plan from the feedback, the HOS presented the final strategic plan to the Board at the May meeting where it was formally approved. The current and previous strategic plans all focus on the long-term challenges that the school faces. Previous plans were dedicated to fixing the school's physical plant, which required decades of focus but also included areas of diversity, global service,

school size and academics. The current success of the school is due in part to the completion of these previous plans. The current strategic plan covers three areas of the school – the academic program, a new math and computer science building and financial aid (a copy of the strategic plan is located in the appendix). The HOS will officially announce the strategic plan in the early fall of the 2015-16 school year. There are other areas of the school that will require attention – playing fields, parking lots, road work, but none of these were significant enough to be considered as part of the plan.

The HOS meets weekly with the entire Administrative Team and has weekly or bi-monthly one-on-one meetings with most members of the team. The HOS also meets with all department chairs once a month to discuss ongoing department work.

What are the school’s overall strengths in regard to the area of institutional leadership:

- The current Board is composed of members who are passionate about the school and recognize the significant role they play
- The professional expertise of Board members in areas that are beneficial to the school
- A smooth transition from a long-standing, successful HOS to a new HOS
- A highly functioning Board
- A strong set of committees with broad expertise in their fields

What areas of growth and/or recommendations does the school make in the area of institutional leadership:

- Strengthening the Board by increasing the number of Board Members. The current number of voting members is below the number required by the bylaws.
 - Adding committee members to develop potential candidates for the full Board
 - Adding new parents or parents of younger children to committees and the Board
 - Adding alumni and alumni parents to serve on the Board
- Create a mechanism for objective evaluation of Board work.

Documents Provided to the Team Chair, Vice Chair, Governance Evaluator & NWAIS:

- The Overlake School’s Articles of Incorporation and Bylaws
- 2015 Strategic Plan
- The school’s governing body’s policy manual/handbook (available on site)
- A list of current school governing body members, their various affiliations to the school, and their tenures on the board
- Agendas and minutes for three consecutive recent school governing body meetings
- The current goals and/or work plans for the governing body standing committees
- The most recent meeting agendas and minutes/notes from the school’s governing body standing committees.
- Sections of the Head of School’s contract dealing with issues of evaluation, renewal, and termination

Finance

Section Writers: Warren Gilles, Business Office Manager, Sean Clark, Controller, Sandra Mocanita, Accounts Payable, Roberta Maize, Accounts Receivable/Student Accounts Representative, Chris Williams, Board President

Completion Date: June 2014

STANDARD: 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.

The school has adequate current financial resources to support its operations.

Discuss the adequacy of the school's finances to support the mission of the school and the school's current program. What are the chief challenges in this regard?

The Overlake School maintains an operating budget that has sufficiently supported the mission of the school for many years. The operating budget is constructed annually by the Head of School and Business Manager. It is also reviewed by the finance committee and ultimately approved by the board.

Chief challenges include: costs of maintaining large campus, annual insurance increases (health, property, liability) in excess of overall inflation rate, maintaining high standard of salaries/benefits to faculty and staff.

Describe the revenue streams for the school and include the percentage each represents of the school's total Revenue.

For the fiscal year 2012/2013:

Net Tuition/Fees:	75.5%
Contributions and Gifts:	4.0%
Auxiliary Enterprises:	7.5%
Investments	8.8%
Other	.2%
Assets released from restriction	4.0%

What funds are set aside in a reserve fund for (a) emergencies (b) physical plant replacement (c) other purposes? Describe all reserve funds, current balances, how they are funded, target balances, and approval process for accessing these funds.

Fund	Balance	How Funded	Target Balances	Approval Process
Emergencies				
General Reserve		Investment Gains/Losses	n/a	Finance Committee
Physical Plant Replacement				
PPRSM		Operating Budget/Surplus	10% Opex	Finance/Buildings and Grounds Committees
Bus Replacement Fund		Operating Surpluses	n/a	Finance Committee
Campaign Project Reserve		Operating Surpluses	n/a	Finance Committee
Other Purposes				
Drama Gate		Show Ticket Sales	n/a	Drama Dept Allocation
Outdoor Education Funds		Donation	n/a	Outdoor Program / Head of School
Bond Principal Service Fund		Operations	Annual Principal Payments	Finance Committee
Technology		Operating Surpluses	n/a	Technology Director

What is the school’s policy for investment of endowment, reserve funds, and surplus cash? How is it implemented and monitored?

The school’s Investment Committee oversees the investing and performance of endowment and other reserve funds. The committee meets at least quarterly throughout the year to review performance and discuss any reallocation of investments. The board approves the investment policy and guidelines, and is updated on the investment performance at least annually.

The investment policy of the school is to maximize the long-term return, subject to a level of risk appropriate to also protect funds invested. The main investment areas are Cash, Bonds, Equities (domestic and international) and Alternatives. The risk guidelines for these asset allocations are as follows: Cash (3-10%), Bonds (27.5-42.5%), Stocks (45-65%), and Alternatives (0-5%).

The risk tolerance for surplus cash is near zero. Due to the current economic environment, surplus operating cash is maintained in the main operating checking account. Maintaining a high average balance helps reduce bank fees effectively ‘earning’ more than could otherwise be earned in low/no risk vehicles.

What internal or external debt does the school carry? Does the school have adequate provisions for servicing and paying off this debt?

The school carries two bond issue obligations totaling approximately \$17 million. These two bond issues were to build the new gymnasium, Humanities Building and the Technology and Language Center. Principal and interest payments are planned for in the annual operating budget.

The school’s financial planning process assures the long-term viability of the school through a financial plan that covers at least a three-year period, supports the school’s strategic plan, and drives the development of the school’s annual budget.

How did the school's strategic plan inform the development of its long-range financial plan?

The school's strategic plan was developed by a large committee made up of a cross section of the community. It included representatives from all constituencies. The strategic plan addresses needs of the entire school. Each of these areas has an impact on the financial planning of the school.

The long-range plan that was developed after the adoption of the strategic plan in 2008 took the following areas into account: an educational plan for enhancing the current program, helping create a deeper sense of community, and reorganizing the school schedule to better suit the needs of the students. The plan addressed moderate growth of the student body by adding 50 to 100 additional students.

The long-range plan also took into account the building enhancements that were necessary to meet the above educational goals and to upgrade older, out-of-date facilities. The plan also addressed compensation and benefits for employees, diversity for the larger community, technology infrastructure, increasing the financial base of the school, and increasing the size of the school's endowment.

Describe the process and frequency by which the school revises and updates the long-range financial plan.

Due to the nature of this plan, it was originally designed as a 10-year plan. It has been updated at least annually based on market conditions and changes related to the strategic plan initiatives. The plan, as it has been updated over that past five years, has been condensed to a 5-year plan.

The plan is updated when the preliminary budget is approved by the Board of Directors in January each year. The plan is assessed based on three criteria. Those criteria are market conditions, the preliminary budget for the upcoming school year, and any additional school initiatives.

What are the greatest financial challenges that the school faces? Do any of these challenges impact the school's viability within the next three years or longer? If so, what steps is the school taking to address these challenges?

The greatest challenge faced by the school is to maintain current enrollment levels while balancing the cost of the education. The school tries to be conscious of the costs to our current and prospective families. Location is another challenge. Having a slightly more remote campus can affect the draw for families outside the immediate area.

Maintaining a 73-acre campus along with competitive salaries and benefits are also challenges as these costs often outpace inflation.

At this time we do not see any of these challenges as risks to our viability over the next three years. Our applications are strong. We are in a great place with our salaries and benefits. We instituted a transportation program seven years ago to maintain the area we draw from and we have added a PPRRSM fund which is already half way to its goal and could fund multiple large repairs.

Describe the procedures and timeline for the development, approval, and monitoring of the annual budget.

The process begins in October of each year when the administration asks for budget requests from each department. Those requests are due to department heads in November. The department heads approve the requests and give them to the Business Office by December 1st. The Business Office then assembles the requests into the budget format and the business manager and the head of school go over the budget and make any changes necessary.

The preliminary budget is reviewed at the December Finance Committee meeting. Any changes from that meeting are made, and the Business Manager and Head of School examine the budget once more. Once these reviews are done, the Business Manager will make one or two models showing different tuition increase scenarios.

Models are presented to the Finance Committee at their January meeting and from that meeting the committee makes a recommendation on the budget to the Board of Trustees at their January meeting. The Board will then set tuition and approve the preliminary budget for the upcoming school year.

Once the preliminary budget has been adjusted for actual student count and other known changes in specific areas have been made, the budget is reviewed and finalized at the Finance Committee and Board of Trustees meetings in October of the following school year. The budget is monitored by the business office during the school year with regular reports to the Finance Committee at their monthly meetings.

The school follows practices sufficient for the governing body to provide oversight and guidance regarding financial operations.

During monthly board meetings, the Finance Committee Chair will report on the financial condition of the school. During certain meetings, information is handed out in regards to the preliminary budget, final budget and the year-end actuals for any given year. The full board also has access to the meeting minutes for the Finance Committee and can ask specific questions at their meeting.

Each year the school has an audit performed by a local accounting firm. This audit is conducted in accordance with GAAP accounting principles. Annually the auditors meet with the Finance Committee and go over the financial statements of the school. During that meeting the staff is excused to allow the committee members direct access to the auditors to ask any questions they

might have related to the financial condition of the school. The Finance Committee chair reports to the full board that the audit was completed and the outcome of that audit.

Describe the frequency and nature of the interactions between the governing body’s oversight group and those administratively responsible for financial management.

The Finance Committee Chair and the Business Manager communicate regularly, and both attend monthly Finance Committee meetings and Board meetings. They also communicate via email and phone leading up to the finance meetings.

The school follows practices sufficient for the governing body to provide oversight and guidance regarding risk management.

What insurance coverage (and in what amounts) does the school carry? How is the insurance coverage of the school reviewed for adequacy by the school’s governing body on a periodic basis? What significant risks has the school chosen NOT to insure against?

2013-14 Insurance Summary

Coverage	Limits	Deductible
Property	\$ 49,700,000	\$ 10,000
Earth Movement/Flood	\$ 35,000,000	\$ 100,000
General Liability	\$ 1,000,000	\$ -
Inland Marine	\$ 456,735	\$ 1,000
Commercial Auto	\$ 1,000,000	\$ 1,000
Educators Legal Liability	\$ 3,000,000	\$ 1,000
Umbrella Liability	\$ 10,000,000	\$ 10,000
Foreign Liability/Travel Accident	\$ 2,000,000	\$ -
Fiduciary Liability	\$ 2,000,000	\$ -
Directors and Officers Liability	\$ 8,000,000	\$ 10,000
Crime	\$ 500,000	\$ 10,000
Kidnap and Ransom	\$ 1,000,000	\$ -
Cyber Liability/Network Security	\$ 1,000,000	\$ 5,000

The insurance carried by the school is reviewed annually by the Business Manager with a report to the Finance Committee at a monthly meeting. The Finance Committee gives the Business Manager direction as to what areas to look at for increasing current or instituting new coverage. The school also works with a broker that deals with many schools and they also give input regarding coverage.

There are no significant risks that the school has chosen not to insure.

Describe the variety of ways in which the school addresses risk management beyond carrying adequate insurance coverage.

The school is very risk conscious. We have many events and programs that deal with moving children to different locations throughout Washington State, the United States and the world. In addition to our insurance coverage, we do trainings for trip leaders, and require trip leaders to be first aid certified or wilderness first aid certified (dependent on the trip).

We do trainings for our non-cdl drivers who move students to games or events. We have a risk management committee that meets regularly to discuss issues that arise on campus and to set policy for handling many possible scenarios. We have annual earthquake and lockdown drills along with required fire drills. We also debrief real situations to be better prepared for any future events. We have a full-time trainer on staff who can handle most emergencies as well as several first responders who are wilderness first aid trained. They are also on staff.

We recently installed a new e-911 system that informs authorities with building and room number if 911 is called. This system also alerts first responders on campus as well as our front office. We have files for each student and employee with important information about their health conditions and emergency contacts. We also added an AED device to every building on our campus for better access in an emergency situation.

The school completes a full independent audit twice during an accreditation cycle no more than four years apart, one of which has to cover the fiscal year prior to the accreditation evaluation, and addresses issues raised in the management letter, if applicable. (Note: Should the audit not be available for the visiting team, the previous year's full independent audit or financial review may be reviewed during the visit. However, the school will not be given unconditional accreditation until the full financial audit for the fiscal year prior to the accreditation evaluation and the school's response to the issues raised in the management letter are reviewed and approved by the team.)

Describe the school's audit and financial review schedule and the rationale for this schedule.

The school has an annual audit by an outside accounting firm. This audit is conducted each summer and is usually completed in September. Once completed, it is reviewed by the Finance Committee and Board at their October meetings. The school is on a fiscal year which begins July 1st and concludes on June 30th. The audit field work happens in July and August with the final report due in October. The school is also required, due to the size of the program, to complete an annual audit of its 403b plan. This audit is also completed by an outside accounting firm and is completed in December.

If the school received a management letter, what steps have been taken to address the recommendations outlined in the management letter?

While the school has not received a management letter in a number of years, the staff of the business office would notify the head of school and finance chair of any potential management letter item. The staff then works with the auditors, Head of School and Finance Chair to provide an acceptable solution. The staff works diligently to ensure that no management letter issues exist.

Auxiliary services are appropriately funded and mission appropriate.

What auxiliary services does the school offer (e.g. ski academy, distance education courses, transportation, food service, bookstore, extended day, summer program, etc.)?

The school offers transportation, food service, student store, tutoring and outreach.

Describe the purposes of each auxiliary service and how each service fits into the mission of the school.

Transportation is an important aspect of the school's mission. Transporting students from home to school allows us to service a larger geographical area. Our comprehensive service meets the needs of the students by giving options to be at school early for zero period classes and to stay late to be involved in athletic or fine arts programs.

Proper nutrition and not being hungry are integral parts of learning and being successful. Our program provides a healthy, well-balanced breakfast, lunch and snacks so all students can strive toward educational excellence.

Our student store provides the students with needed supplies to accomplish their educational goals. Items are available to complete projects on paper or digital media.

Tutoring is available if a student falls behind in a subject or if they want to improve their grades in specific areas. Tutoring must be recommended by our learning services office to be available to students.

Outreach allows other organizations with similar missions and goals to use the campus during the summer months. These events include rentals to Summer Institute for the Gifted, the Pacific Science Center, and Seattle Youth Symphony Orchestra, as well as summer sports camps for students. These events not only provide educational benefits but bring a wider audience to our facilities that could lead to more students applying to become students at The Overlake School.

What is the impact on the operating budget of each auxiliary service?

The school provides a small subsidy to operate the home-to-school transportation service. All other transportation is funded by various departmental budgets.

Food service operates at a loss for the entire program mainly because the school provides breakfast, lunch and snacks during the day for all employees. This is meant to increase the number of adults in the lunchroom who also provide supervision of the students during these times.

Our student store is not large in volume but usually produces a small amount of income each year.

Tutoring is operated at a very small profit as it is an educational service and important to the success of our students.

Outreach is operated at a modest profit.

How does the school evaluate whether or not an auxiliary service is meeting its purpose?

During the budget process, these programs are discussed in relation to their financial viability and their educational or institutional value. Our goal each year is to continue these programs as they are essential to the mission of educating students. Any changes to these programs, or initiatives to add new programs, are discussed by the Administration.

The school forthrightly and regularly communicates its financial status to appropriate constituencies.

In what ways does the school communicate its financial status with employees? With parents? With donors?

The school informs employees of financial status during employee meetings throughout the year. All employees also receive the annual report that the school generates each year.

Parents are informed by the annual report which is mailed to all families. The head of school gives a “state of the school” address at our PFSA meetings. Donors are informed by an Annual Donor Report and our annual audit is available by request.

What are the school’s overall strengths in its financial operations:

The school is fortunate to be very financially stable while providing a strong educational program to its students on a campus that is both welcoming and well-designed. Some financial strengths leading to this success include:

- Strong group of oversight committees enlisting knowledgeable, experienced and committed parent base
- Forward looking approach
- Cost conscious approach from top management down
- Knowledgeable and experienced financial staff
- Organized budget process with proper oversight throughout

What areas of growth and/or recommendations does the school make with respect to its financial operations?

- The school can always benefit from on-going exploration of alternative revenue sources
- Given the high cost and risk factors of Human Resources and Benefits, additional consulting or staffing could eventually be warranted
- As the school's endowment focus continues in a growth cycle, the focus on any differences in managing a larger endowment should be monitored.

Documents Provided to the Team Chair, Vice Chair, Governance Evaluator & NWAIS:

- The two most recent audits along with the management letter(s), if applicable, and the school's response to the issues raised in the management letters(s)
- Documents that communicate the school's financial status (annual reports, newsletters, etc.)
- The current year's budget
- A three year history of prior budgets and end-of-year results
- The current interim financial statement
- A cash flow analysis for last year and a projection for the current year
- Published salary scales for faculty and staff (if applicable) OR average salary by experience
- The latest long range financial plan
- Copies of the investment and endowment policies
- A summary of insurance and surety bonds
- Copies of financial reports generated for the most recent meetings of the Finance Committee and the governing body

Administration

Section Writers: Matt Horvat, Head of School, Gerald Buhaly, Upper School Head, Brenda Leaks, Middle School Head, Mike Davidson, Dean of Students, Warren Gilles, Business Office Manager, Tom Frizelle, Director of Technology (Past Employee), Lori Maughan, Director of Admissions (Past Employee), Diane Freytag, Director of Counseling & Advising, Mark Manuel, Director of Diversity (Past Employee), Carol O'Donnel, Director of Development & Community Relations (Retired Employee)

Completion Date: June 2014

STANDARD: 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.

The school has created an effective administrative structure that covers the essential areas of school leadership, development, institutional advancement, enrollment management, school operations, financial management, and academic leadership.

Describe the process by which communication between the various administrative functions is accomplished.

The Overlake School Administrative Team is made up of 9 (10 in 2014-15) directors and the Head of School. During the school year, the administrative team meets weekly as a group to check-in and provide updates related to essential aspects of the school. The weekly meeting is also the primary venue to discuss changes to school policy and problem-solve issues that involve multiple areas of the school program.

The Head of School also meets regularly, normally weekly with each of the directors who reports directly to him, to discuss functions related to each director's area. When necessary, various directors will form small groups to work on specific issues or special projects.

In addition to the weekly meetings, the administrative team utilizes an email distribution list to facilitate communication among the team. This distribution list is used primarily to communicate time sensitive information or materials needed to prepare for the next face to face meeting.

How is the effectiveness of the overall administrative structure assessed?

The Administrative Team uses several methods to ensure the overall effectiveness of the team's structure and function. Prior to the start of each year, the Administrative Team conducts a multi-day retreat in order to map out the upcoming year and to communicate about any major initiatives. These retreats are also used to build a cohesive team and assess how well the structure and function of the team is working. The Head of School also conducts both formal and informal check-ins with various members of the school community. Department audits are conducted to examine areas of strength or weakness. Through his observations, changes are made designed to improve the structure. One example occurred in the 2014-2015 school year when the Head of School split the

responsibilities of the Development Director and created a new position on the Administrative Team for a Director of Communications.

Additionally, the Administrative Team has worked with a leadership coach. This coach focuses on developing specific leadership skills and provides critical feedback to the team and individuals related to their role at the school.

The school's administration has sufficient resources to conduct the school's program.

Are the resources (personnel, funding, materials, and equipment) of the administration adequate to meet the school's goals? If not, what plans does the school have to address this issue?

The administration has sufficient resources to meet the needs of the school and to achieve the goals of the organization. As the administrative team is made up of ten members who represent a cross section of the school's disciplines, feedback about resources in each area of the school is communicated within the team to the Head of School. To date, the school's budgets are sufficient to provide for all materials and equipment. The administration works diligently to plan and organize any initiative which includes a significant change to funding.

The school has processes in place to familiarize itself and comply with federal, state, and local laws and regulations that apply to the school. (In answering the questions below, consider compliance issues related to Human Resources, School Plant, Finance, Health & Safety)

How does the school keep abreast of applicable laws and regulations that apply to the school?

Each member of the Administrative Team is responsible for any changes in laws or regulations that affect his/her area of responsibility. Any changes that require action are brought to the Administration Team meeting and discussed. If a change in operations or policy is needed, it is discussed, assigned to a member of the team or group of members. This person (or committee) will create a plan and then formulate how that plan will be executed in the community. After such a change, the person (or committee) will report out to the team as well as the Head of School.

How does the school evaluate compliance with applicable laws and regulations?

The Administrative Team members are each responsible for evaluation of the school's compliance on all laws and regulations for their area of oversight. The process each member goes through can be different based on his/her area of responsibility. Examples of how compliance issues are evaluated include receiving updates from professional organizations such as NAIS or NWAIS, receiving information from state and local agencies and reading relevant material. The school's attorney also provides information on any legal changes and works with the school on adopting these changes. Compliance items are then brought to the team's regularly scheduled meeting and discussed and implemented.

What are the school's overall strengths in regards to its administration:

The Overlake Administrative Team meets weekly to discuss issues that have arisen during the previous week or issues or events that will be coming up in the future. Touching base weekly gives the group a good perspective on the school as a whole. The group begins each year with a retreat to set the course for the year. They are very cohesive, collaborative and responsive, particularly in an emergency. The team is experienced in their areas as well as in schools in general. They all are engaged in ensuring the school is successful.

What areas of growth and/or recommendations does the school have in regards to its administration:

Administrative Team members are located in different areas of the campus making ongoing and daily communication a struggle. The team feels they need to work on better and more consistent communication within the group. The Administrative Team also wants to focus its efforts on improving its communication with faculty and staff on its role and function at the school.

Documents Provided:

- An administrative flow chart that includes the names and titles of administrators and staff along with the reporting structure

Institutional Advancement

Section Writers: Carol O'Donnell, Director of Development and Community Relations (Retired Employee), Katharine Barrett, Development Committee Chair, Warren Gillis, Business Manager, Matt Horvat, Head of School, Brian Holl, Alumni Program Manager (Past Employee), Lori Maughan, Director of Admissions and Financial Aid (Past Employee), Megan Sykes, Webmaster, Amy Thickpenny, Development Records Manager, Larry Metzger, History Department Chair (Resident Outsider, Retired Employee)

Completion Date: April 2014

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

The school's institutional advancement program is designed and operated in a way that supports the mission and program of the school.

Describe the school's institutional advancement program.

Institutional advancement at The Overlake School is a strategic, integrated program with the goal of creating support for the school among its key constituent groups including current families, alumni, parents of alumni and prospective students and families as well as the broader local and regional community.

For the past nineteen years, the school's institutional advancement program has been in a single department led by the same Director of Development and Community Relations. Current staffing includes an Alumni Program Manager, a Communications Manager, a Webmaster, a Records/Data Base Manager, a vacant Assistant Director of Development position, an Events Coordinator/Development Assistant and a Receptionist who also offers clerical support. The department's work includes fundraising, advertising/marketing, electronic and print communications, alumni relations and website and graphic design support for all areas of the school's operations and program.

The primary goals of the Development/Communications Department are:

- Secure financial support from potential donors committed to the mission of the school
- Engage alumni in the life of the school as volunteers, advocates and donors
- Promote the school to prospective students and their families, to current students and their families and to other identified outside constituencies
- Manage marketing and advertising for student recruitment and public awareness
- Provide consistent, accurate information for all constituencies
- Build positive relationships with neighbors, the press, the City of Redmond and other groups as identified

Driven by the rapid growth of communication tools, the desire of all constituencies to have more frequent, timely and detailed information and the retirement in June of 2014 of the long-time

Director of Development and Community Relations, the department is being divided into two separate departments—Development and Communications—with Directors who report to the Head of School. The directors will supervise staff, manage departmental budgets and serve on the school’s Administrative Team. The new departments will be in place by July 1, 2014, the beginning of the 2014-15 fiscal year.

How does this program support the school’s mission and program? (Consider relationships with parents, alumni, friends and neighbors with regards to fundraising, public relations, community relations and communications in responding to this question.)

The mission of the school, *Inspire Excellence. Develop Intellectual Curiosity. Teach Responsibility. Embrace Diversity. Foster a Compassionate Community*, informs every action the school takes, both programmatic and operational.

Marketing and Advertising:

The 2007 PNAIS Visiting Team Report recommended that the school undertake a “comprehensive assessment of its current strategic and day-to-day communications and marketing with both internal and external constituencies” to create a consistent brand for the school.

In 2008, the school contracted with Hansen Belyea, a Seattle design, marketing and public relations firm, to do a comprehensive review of Overlake’s communications and marketing. Their work included an in-depth competitor review, focus groups of parents, students, alumni, faculty and administrators, interviews with community leaders and surveys of all constituents. The purpose of the review was to clearly define both the unique qualities of the school and its position in the area independent school market and to assure that branding and messaging was aligned with the school’s mission statement.

The end product of this work was a brand platform with messaging and graphics that were used in a new admission recruitment brochure and in all of the school’s print and electronic communications including media releases, the external website, overlake.org, and the intranet, OwlNet; the weekly electronic newsletter for parents, the *eBulletin*; the bi-annual magazine, *The Overlaker*; the *Annual Donor Report*; print and electronic advertising and miscellaneous publications such as the *School Profile* and the *Counseling and Advising Handbook*.

In 2013 Hansen Belyea was again engaged to review the school’s current brand with a special emphasis on defining those qualities that differentiate Overlake from other high-quality independent schools in its catchment area and to make sure that what the school is saying about itself accurately reflects the reality. The same process was used and we received a refreshed branding platform with a more academic look and more sophisticated language that was used to create a new recruitment brochure and has been incorporated into advertising and print communications. One of the most valuable results of the process was the clear identification of Overlake’s real competition.

The full implementation of the messaging and design elements of the updated branding platform will be a challenge for the new Director of Communications. One of the first tasks of the new Director will be to conduct a school-wide communications audit that defines the sender, messaging and graphic look of all communications from the school and its affiliate groups. Based on the audit, he or she will then create a communications plan that addresses the need for a uniform, cohesive

brand that covers all areas—from a branding guide for school apparel to a short statement that describes the school and its programs and is known, understood and used by all members of the school community.

Website: overlake.org

The school has a full-time Webmaster who is responsible for the design, construction and maintenance of the school's website. The Director of Communications is responsible for the content. In 2013-14, the website and the intranet, OwlNet, were moved to a single platform and the design and navigation completely upgraded to be more accessible and interactive. The new website is integrated with the school's data base, allowing customization of the student and parent experience. For example, in the "forms" portal, parents only see forms that relate to their students, and their profile information (name, address, etc.) is automatically entered on the form. A full content and photo review will take place over the summer of 2014.

Social Media:

Both the school and the Alumni Program have Facebook pages. The school and the Athletics Department tweet regularly and LinkedIn is a very successful tool for the Alumni Program.

Constituent Relationships:

Prospective Parents and Students

Although word-of-mouth is the way most people learn about Overlake, the school's website is the primary source of information for prospective parents and students. The admissions and financial aid pages of the website have been designed for ease of use based on user feedback and surveys. More about the efforts of the school to connect with prospective families can be found in the admission section of the report.

Parents

From the moment students accept Overlake's offer of admission, new families receive a series of communications designed both to give them the information they need in a clear, timely way and to acculturate them to the school community. From registration information and medical forms to *Quick Notes* (a publication that includes information about the unique culture of the school, coming events and a dictionary of Overlake terms) to *Giving and Getting Involved at The Overlake School* (a booklet that discusses fundraising and volunteering at the school), we make every effort to make our new families feel welcome.

In addition to communications from the various academic and co-curricular departments, Overlake parents receive a weekly electronic newsletter, the *eBulletin*, featuring activities of the week, upcoming events and grade-level news that is very popular with parents. The main source of information about all things Overlake for students, parents, faculty, staff, Board members and administrators is the password-protected section of the school's website overlake.org.

The school has a very active Parent/Faculty/Staff Alliance, the PFSA that supports the school in a variety of ways including an annual benefit auction that earned over \$400K in 2014, \$215K of which

was fund-a-need for financial aid. In addition, volunteers support class activities, arrange social events for students, thank faculty and staff in a variety of ways, conduct a textbook swap and facilitate communication between parents and the school. The Director of Development and Community Relations has been the liaison between the PFSA and the school and serves on the PFSA Executive Board. The new Director of Development will continue in that role.

The school also has two active booster organizations, Overlake Friends of the Arts (OFTA) and the Overlake Athletic Club (OAC), which provide financial and volunteer support for the arts and athletics. Both of these groups consult the Director of Development and Community Relations in matters related to fundraising.

There are also additional opportunities for parents to volunteer—the annual benefit auction, the Library and as speakers at the school’s Career and Wellness Fairs to name a few. Parents are encouraged to volunteer, attend performances and athletic events, and participate in other parent groups such as ParentNet and the Parent Seminar Series. Community is a core value at Overlake and one of the most important aspects of an Overlake education for both students and families.

Alumni

The goals of Overlake’s Alumni Program are to provide opportunities for alumni to be engaged in the life of the school in an ongoing way and to cultivate them for fundraising both now and as future major and/or planned gift donors. The school has a full-time Alumni Program Manager who is responsible for the day-to-day operations of the program and an active Alumni Committee that plans events and strategizes for fundraising.

The school is connected to its alumni in many ways. In addition to the alumni page on overlake.org, alumni use Facebook, Twitter, LinkedIn and email to keep informed. We also devote half of our school magazine, *The Overlaker*, to alumni stories and class notes.

Overlake makes every effort to bring alumni back to campus for reunions and special events and to join in current community activities that are important to the school. They are invited to plays, lectures, sports events, the Writers’ Symposium, service days and outdoor education trips. They participate in the Counseling Department’s Career and Wellness Fairs and in early January the Alumni Office and the Counseling Office co-sponsor the Graduates Return Program, which brings recent alums back to campus to share their college experiences with current students.

Engagement of alumni begins with the current seniors. The Alumni Program Manager visits senior homerooms and gives them information about the alumni program and in October, current seniors pack and send “care packages” to the previous class. In the spring, the Alumni Office hosts a special breakfast for seniors where they are formally inducted into the Alumni Association and choose their class contacts. At that time, they can also choose to be part of The Overlake Connection, a program that connects alumni with current students for college visits, employment advice, and opportunities for internships and senior projects. At graduation, seniors receive an official alumni membership card with the alumni office’s contact information.

The Alumni Board plans and the school hosts events like the annual summer reunion, regional reunions, young alumni events and happy hours that provide opportunities for alumni to come together to network and to reconnect with their classmates. Alumni are also invited to small get-

together for dessert and coffee or wine and cheese prior to important school events like the all-school musical or the Writer's Symposium evening lecture.

Overlake believes that it is prudent to invest now in the development of an alumni program that will build long-term support for the school.

Current Students

With the goal of teaching students about philanthropy, the Development Office and the Service Learning Department worked together to create a process for student fundraising on campus, which includes a Student Philanthropy Board. The Director of Development and the Director of Service Learning are the advisors. The Board is comprised of students in grades seven through twelve and is charged with approving all fundraising by student groups. The process includes a formal application by the group wishing to fundraise and a review of the application by the Board. The application process requires that students research the beneficiary organization and communicate with the organization to be sure that the planned fundraising meets the organization's needs. There is also a requirement that the student groups report the results of their efforts to the entire Overlake community.

Neighbors and the Area Community

The school makes every effort to be a good neighbor and the Director of Development and Community Relations is the liaison between neighbors and the school. Overlake is located in a rural area with narrow roads and brings somewhere between 500 and 600 cars to and from campus every day so there are occasional issues with driving and traffic. The Director of Development and Community Relations and/or the Business Manager respond to these complaints immediately. The school corresponds regularly with its neighbors to advise them of upcoming events that will impact traffic and to invite them to plays, concerts, lectures and other events. Neighbors also receive our school magazine.

Fundraising:

Overlake has conducted four back-to-back capital campaigns since 1995, raising over \$30M to build facilities for academics, arts, athletics and student life. The Annual Fund and auction bring in approximately \$750,000 in unrestricted gifts each year and additional donations provide funds for endowment and special purposes. In 2011-12 and 2012-13, the total raised each year (excluding capital campaign pledge payments) exceeded \$1M. Moving forward, fundraising will be focused on major gifts, endowment building for financial aid and planned giving.

Most of the school's financial support comes from current parents, but all constituencies are involved: trustees, current parents, alumni, faculty and staff, parents of alumni, grandparents and friends. The school is relatively young and so has a small alumni group. Currently, alumni giving is minimal, but the school believes that the Alumni Program will result over time in more participation and larger gifts.

The reorganization of the Development and Communications Departments will allow the Development Office to fully focus on fundraising. The school seeks to hire a seasoned Director of Development with a proven record of success to move the school's development efforts to the next

level. The new director will fill the current vacant Assistant Director of Development position with a skilled professional who can assist with annual gifts, major gifts, planned giving and capital fundraising.

Describe how the school demonstrates long range planning for its institutional advancement program that incorporates the school's strategic and financial plans.

The opening of the Francisco J. Grijalva Fifth and Sixth Grade Center in 2011 successfully completed the school's Facilities Master Plan adding seven new program-driven buildings, a turf athletic field, a turf practice field, tennis courts and a significant renovation of the Campus Center. The current campus is sized for no more than 550 students and enrollment over the past few years has been in the 525-30 range. The school used a combination of low-interest bonds and capital campaign fundraising to finance the buildings.

Moving forward, the focus of the Board is on the school's academic program. In 2013, the Board approved a series of academic initiatives directed at making an excellent academic program even better and creating a community of collaborative, reflective educational practitioners. The initiatives include a reduction in teaching course load, the addition of a full-time instructional coach and an in-depth review of the curriculum. The implementation of these initiatives was planned by a small committee that was comprised of the Middle and Upper School Heads, the Upper School Dean of Students, the Business Manager, the Head of School and the Director of Development and Community Relations. Included in the implementation plan was a communication strategy with a timeline and messaging to provide information to the faculty and staff, current parents, students and alumni, which resulted in acceptance, approval and enthusiasm from the various groups.

In the spring of 2014, the Board reviewed and prioritized the school's financial needs including building endowment for financial aid, upgrading some classroom spaces, improving the athletic fields and acquiring adjacent property. The results of this review will provide direction for the school's fundraising for the next three to five years.

The school has sufficient resources to conduct its institutional advancement.

Describe how school resources (personnel, materials, equipment and funding) adequately meet the school's advancement goals.

The school is responsive to the financial needs of the Development and Communications Department. Budgets are based on annual work plans and funds are made available for special projects when needed, for example the branding update. Professional development opportunities are encouraged for all staff including workshops, webinars and conferences. The school uses Senior Systems for development and alumni management and provides ongoing training for all users.

When the vacant position of Assistant Director of Development is filled, staffing will be adequate for the current fundraising and alumni program. However, as the school's fundraising program expands to include significant major gifts, planned giving and endowment or capital campaigns, it may be necessary to add staff. In past capital campaigns, the school added a full-time campaign manager and campaign counsel for the duration of the campaign.

The school also understands the importance of records management to the fundraising process and created a full-time Development Records Manager position. Since the addition of this position three years ago, with the goal of meeting the CASE standards for reporting, the Development Office has created a detailed database and gift management manual, registered for fundraising in all states that require such registration, and created development records management and document retention policies.

In the new Department of Communications, the position of Communications Manager has been reclassified as Director of Communications and the Receptionist position will now report to the Director of Communications. Beginning in 2014-15, the new Department of Communications has a separate budget. The preliminary budget takes into account additional expenses for graphic design services that will be contracted out. (Previously, the Communications Manager did most of the design and layout work.) The budget for these services will need to be reviewed mid-year to be sure that it is adequate to produce quality publications that reflect the excellence of the school program. Staffing for the new department will also need to be reviewed at the end of the 2014-15 school year to be sure it is adequate.

What long-range advancement issues face the school?

Like all independent schools, Overlake is concerned about continually increasing tuition that has the potential long-term effect of making an Overlake education beyond the reach of middle class families. In addition, the school's operating budget currently includes over a million dollars for financial aid, which is funded primarily through tuition. This does not include Malone Scholarships that are funded from a separate endowment or several other small scholarships. The school's eventual goal is to fund financial aid through endowment income, which will require a much larger endowment and extensive fundraising efforts by the Board, the Administration and the Development Office.

The second long-range issue is competition with other schools for "mission appropriate students." Overlake is currently very much in demand. However, as additional opportunities for other options such as charter schools, IB programs in public schools, new and expanded independent schools and public school gifted and talented programs emerge, Overlake will need to be sure its marketing efforts and value proposition reflect the excellent quality and unique character of the school's academic and co-curricular programs.

The school reviews its institutional advancement management program on a regular basis and revises as needed.

Describe the review process.

Overall direction for fundraising and communications comes from the Board of Trustees and the Head of School. Working with the Head, and the Development Committee of the Board, the Director of Development and Community Relations creates an annual work plan with a timeline and assigned staff responsibilities. The Head of School meets weekly with the Director of Development and Community Relations to monitor progress. The current Development Committee is a small work group comprised of two Board members, the Head of School and the Director of Development and Community Relations and is charged with developing strategies to increase both

unrestricted annual giving and the school's endowment. Moving forward, the committee will be expanded to include members of the community who are willing to actively fundraise.

The new Communications Department will conduct an audit of all school communications and develop a communications plan with implementation steps and a timeline that will be reviewed regularly by the Director of Communications and the Head of School.

The school interacts constructively with its community and avails itself of community resources.

How does the school view its relationship with the broader community?

Hallmarks of an Overlake education include teaching and learning with a global perspective, experiential learning, and meaningful civic engagement. Overlake values its relationships with the broader community from local to global, beginning with the school's neighbors. Neighbors receive the school's magazine and invitations to school events. They are also welcome to use the school's trails. The Director of Development and Community Relations sends regular updates to neighbors advising them of construction and events that will impact traffic or parking.

Global focus is an important component of an Overlake education. Project Week, a one-week experiential learning program that occurs each spring, provides opportunities for students and faculty to be involved in regional, national and international service. In addition to trips to our sister schools in Pailin, Cambodia and Bella Union, Uruguay, Project Week offers opportunities for expanded global perspective through classical and foreign language exchanges to China, France, Spain and Italy. Additional opportunities for service learning range from working with migrant workers in Yakima to building a house in Mississippi to helping in a small village in the Dominican Republic.

As a graduation requirement, every senior participates in a three-week Senior Project. Many of these projects are done locally and regionally with both non-profit and for-profit organizations, further extending the school's reach into the broader community.

Describe the ways the school benefits from and gives back to the community.

Overlake is both a contributor to and a beneficiary of the local and regional community. Overlake provides significant economic benefits to the area through its employment of approximately 125 individuals, its use of local vendors, and the purchase of local services, including the rental of spaces in local parks and clubs for games and practices for cross country, baseball, lacrosse and golf.

Overlake's Service Learning Program maintains partnerships with dozens of non-profit organizations throughout the Puget Sound area where students, faculty, staff and alumni volunteer. Although the service requirement is only 15 hours per year in grades nine through twelve, most students volunteer for significantly more time. The school has worked with some of these organizations for many years including the regional food bank, Northwest Harvest, and Avondale Park, a transitional housing program located near the campus, where students and adults prepare and serve dinner every month. Over the years, Overlake students have volunteered thousands of hours to these organizations.

Clubs at Overlake are student-driven and many are focused on community benefit. Current clubs include Outreach, which has provided assistance for several global health organizations, KIVA providing microloans, Alex's Lemonade Stand to benefit young cancer patients and Dig Deep, a non-profit founded by two Overlake students with a goal of providing clean water to rural people in third-world countries.

In November of 2011, two Overlake seniors, Madeline Colvin and Grace Grubb, were honored at the Puget Sound region's National Philanthropy Day luncheon as Outstanding Young Philanthropists of the year, based on their work establishing Dig Deep and raising funds to build two wells in small villages in Africa.

The school's music department also has an active outreach program, which sends the jazz band and other musical groups out to area residential facilities such as senior citizen residences.

Overlake's campus serves a number of area non-profit groups. During the summer, Overlake is home to the Seattle Youth Symphony, the Summer Institute for the Gifted and the Pacific Science Center's day camps. During the school year, if available, several smaller schools have used Overlake's performance space as well.

Overlake also makes two annual lectures available to the general public, free of charge. The first is the Writers' Symposium evening program, which has included such well-known authors as Sherman Alexie (National Book Award winner), Tim O'Brien, and in the spring of 2014, former Poet Laureate Billy Collins. The second is the annual Distinguished Lecture featuring such noted speakers as brain researcher John Medina, educator Alfie Kohn, psychologist Michael Gurian and physicist Helen Quinn. The public is also invited to all of the school's arts events.

The school benefits from the broad array of cultural and historical resources available in the region, from field trips to Seattle museums and performance venues to the wealth of individuals available to visit classes and serve as educational resources for students and teachers. For example, each year the school hosts an Expert in Residence who works with students and adults in areas that have ranged from Japanese art and culture to rocket science.

In 2012, The Overlake School was one of 78 schools nationally to be designated a Green Ribbon School. The award was bestowed based on the school's commitment to sustainability, its outdoor learning and fitness areas, and its campus-wide network of trails.

What are the school's overall strengths in regard to its institutional advancement program?

A primary strength of the school's advancement program has been the longevity of leadership. The retiring Director of Development is preparing a detailed transition plan to be sure the restructuring of the department is as seamless as possible. The new Directors of Development and Communications, with the Director of Admission and Financial Aid, will have the opportunity to build a strong advancement team that works collaboratively to benefit both internal and external constituencies.

The school has a solid fundraising history and base of support, raising over \$30 million since 1995 for new buildings and current annual contributions of over \$1 million.

Data from parent surveys, website analytics and user surveys and the CASE magazine survey indicate that the current print and electronic communication vehicles—the calendar, the directory, the eBulletin, Facebook, Twitter, LinkedIn, overlake.org and *The Overlaker*, are providing their respective audiences with the information that they need and want. The incorporation of the internal and external websites, the data base integration and the ease of navigation are garnering positive reviews from users.

The current Development and Community Relations Department is well regarded by the faculty, staff, and administration, and its staff members are fully integrated into the life of the school. They are viewed by the faculty and administration as partners in providing the outstanding educational experience the school offers. In addition to the duties of their jobs, they are advisors, coaches, Project Week leaders and more, which broadens their ability to communicate accurate and timely information about the school's program, both academic and co-curricular.

The school has a high rate of fundraising participation by trustees, parents and administrators, faculty and staff—rates that are higher than NAIS averages for schools of Overlake's type and size.

The development records management process and manual are detailed, accurate and meet all the requirements of the IRS and state and federal reporting and registration.

What areas of growth and/or recommendation does the school have in regards to its institutional advancement program?

The transition to separate departments of Development and Communications will have challenges around the integration of the new Directors into the school community, potential additions or changes in staff, increased expectations and the general anxiety that leadership change always brings.

The new Directors of Development and Communications will need to get to know the school community, its history and current programs in a short period of time. They will also need to build ongoing relationships which are built on trust and respect with their Administrative Team members and key faculty and administrators. They will also need to assess the strengths and weaknesses of their staff and guide them in achieving new and more demanding goals.

The new Director of Communications will need to audit the current communications, evaluate them against the school's branding platform, create a communications plan and fully articulated graphic standards and implement the updated branding platform without alienating the individuals and departments that currently use their own language and graphics.

Under the Board's direction, the new Director of Development will be charged with moving the school's fundraising efforts to the next level including personal solicitations for Annual Fund, major gifts, and planned giving, which will require more stewardship and cultivation than is currently in place.

The challenge of engaging alumni is ongoing. Current alumni giving is quite low as the result of several factors. The school is young and early graduating classes were small, so while the total number of alumni is growing, the age group that can be cultivated for larger gifts is still small. More significantly, early alumni see the current school as bearing no resemblance to The Overlake School that they attended. The school has become much larger. Only one of the original campus buildings

remains and the rigor of the academic program leads some early alumni to say, “I would never be admitted to Overlake today.” Even more recent alumni are negatively influenced by the rapid growth in new buildings and the demolition of the buildings where they built important relationships with their teachers and fellow students. Continuing work will be needed to build the alumni program particularly in the areas of fundraising and class contacts and to create a case for support that emphasizes the aspects of the school that have remained over its history.

Documents Provided:

- Any written policy statements related to the school’s institutional advancement program

Enrollment Management

Section Writers: Lori Maughan, Director of Admissions & Financial Aid (Past Employee), Lou Sabino, Director of Admissions & Financial Aid, Brenda Draper, Assistant Director of Admissions & Financial Aid, Kaley Brammer, Admission Associate, Margaret Marks, Admission Assistant

Completion Date: May 2014 / Updated February 2015

STANDARD: 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.

The school has defined what it means by a mission appropriate student.

What is the school's definition of a mission appropriate student?

Based on The Overlake School's mission, the Overlake student demonstrates sound academic ability, strong character, independence, and concern for others. Students who possess a variety of interests, skills, talents and backgrounds in academic and non-academic areas contribute to campus life. Involvement in co-curricular **and community activities is encouraged.**

How is this definition reviewed and revised over time?

Review occurs, as needed, in the Enrollment Management Committee (EMC) which is a Board Committee chaired by a Board member. In 2012-13 the EMC Committee conducted a thorough assessment of mission-appropriate students based on entrance exam scores as one measurement of admissibility.

Detailed information can be found in section 2. c (below) regarding entrance exam scores. The EMC meets on an ad hoc basis in support of the department's goals and objectives. In the fall, the Director of Admissions presents an annual report to the Board of Trustees.

The school has an enrollment management program that is designed and operated in a way that supports the school's mission and programs.

Describe the school's enrollment management program.

The enrollment management program strategically utilizes all facets of the application/admission cycle from outreach and recruitment, through the application and review process, culminating with the enrollment and integration of new students. Enrollment management begins in the spring as we prepare for the fall recruitment, advertising, marketing and outreach activities. Documents, web pages, and promotional materials are revised and updated in the spring and summer.

Step 1: We coordinate our key admission dates and common outreach activities with the area independent schools. This is achieved by membership in the Puget Sound Independent Schools Consortium (PSIS).

Step 2: Information is posted on our website linking applicant families to Ravenna, an online collaborative application site offering one-stop shopping for families applying to the schools that are part of Ravenna. Collaboration through Ravenna was first available in the fall of 2012.

Step 3: Admission Review Committees are composed of faculty, staff, counselors, and administrators who are invited to read applicant files and be part of the selection process. There are four committees: 5th, 6th, 7 & 8th combined and one upper school committee for grades 9-12. Each applicant file is pre-read by two committee members who “present” the applicant at our March meeting with all members present. Choosing mission appropriate students is the top priority.

Step 4: PSIS schools mail decisions on a common notification date followed the next day by e-notification.

Describe how your admission assessment procedures help determine whether or not a student is mission appropriate.

All steps in our application process are designed to provide Admissions with the information we need to evaluate applicants as we build a class (grade 5) or complete an existing class of students (grades 6-12). Our goal is to admit academically qualified students who are most likely to engage in the various activities we offer while maintaining gender balance. Every applicant’s file is thoroughly analyzed by reviewing and discussing the following required documents:

Required applicant documentation:

- Application – biographical with contact information
- Parent Statement – PSIS consortium questions
- Student Essays – PSIS consortium questions
- Interest and Activities – Overlake specific form
- Two Teacher Evaluations – PSIS consortium form
- Report cards/transcripts for current year and previous two years
- Standardized Testing – Secondary School Admission Test (SSAT) or Independent School Entrance Exam (ISEE)
- Submission of any other standardized testing is desirable.

In addition, each applicant for grades 5-8 who lives locally is required to attend a one-hour group interview activity session. Applicants to grades 9-12 interview individually. Observation notes from this activity become a part of the applicant’s file which provides insight into an applicant’s interests and in the case of group activities, how the individual interacted with peer applicants.

All required documents in the applicant file have value by providing a unique perspective of the candidate. The information is used by the admission readers as a check and balance system to verify the consistency, or not, in describing the candidate. We also look for patterns over the last two and a half years of report cards and standardized testing to identify consistencies or anomalies. Teacher Evaluations provide an invaluable window into the current classroom environment giving us information on how the applicant functions daily and over time with classmates, teachers and others.

Standardized testing is another important component of the applicant's file.

This is the only document in the file providing a common scale of evaluation as we compare applicants.

The visit day experience and group interview activity session allows the applicant to assess the school and for Overlake to assess the applicant. The activity observation notes provide helpful insight when determining the right fit with Overlake. Faculty and staff who interact with the applicants during the visit day are also invited to submit feedback to Admissions. Any emails, letters, and notes are included in the applicant's file for committee members to review.

Our Related Policy is included with the "Documents to be Provided" section of the report. In summary, it states that each applicant must qualify based on his/her own merit. While related status is not a guarantee of admission, the committee extends "extra consideration" for related applicants. This means we are aware of the related status when reading, discussing and making decisions.

Two of the Diversity Strategic Plan Goals relate directly to admissions and financial aid process. We believe that having such goals provides direction in becoming a more diverse and inclusive school. Goal number two states, "We aspire to reflect our Eastside community in our student body with a particular focus on increasing enrollment of mission appropriate students from under-represented groups."

Using the NAIS categories for ethnic and racial identification, the three groups Overlake strives to increase are: African American, Latino/Hispanic, and Native American. When qualified candidates apply, and we have openings at the respective grade level, we will admit them.

Goal number three states: "We aspire to provide sufficient financial aid to eliminate financial need as a barrier to our diversity goals."

If a qualified applicant is both a student from one of the three under-represented groups and in need of financial aid, we award 100% of need to assist the student and reduce the financial barrier.

How does the school use statistics to support and evaluate the effectiveness of its enrollment management program?

We use a wide variety of statistics to inform us of the effectiveness of our enrollment management program.

Overlake Admission Funnel Statistics – current and past data provide an invaluable comparison as we strategize and manage the admission process. From 2001-2009 application numbers consistently ranged between 260 to 290 applications per season. In 2009 applications increased by 22%. Between 2009 and 2013 applications increased by 33% with over 400 applications received annually. Open houses, visit days, interviews and review committees have all been impacted as we have reformatted to meet the increased demand of processing a significant increase in applications while the admission timeline remains constant, regardless of the number of applications received.

Entrance Exam Scores – For years, the Independent School Entrance Exam (ISEE) was our primary admission test. In 2011, after a great deal of research, we began using the Secondary School Entrance Exam as our primary admission test because the statistical analysis provided by SSAT and the ability to benchmark our enrolled students provided more accurate insight regarding mission appropriate applicants as defined by entrance exam scores. As the one document in the applicant file that uses a common scale of evaluation, the entrance exam results are invaluable to our process.

Financial Aid (FA) – we intentionally use FA as a means to increase socioeconomic diversity, ethnic and cultural diversity, and capture highly capable, well-rounded applicants allowing us to enroll mission appropriate students. Statistical data allows us to evaluate our progress in meeting the Diversity Strategic Plan goals as mentioned in 2 b point 3.

The National Association of Independent Schools (NAIS) Data and Analysis for School Leadership (DASL) and Northwest Association of Independent Schools (NWAIS) information allows us to compare ourselves to peer schools and monitor demographic data. The ability to benchmark how we compare to peer schools is very useful. In addition, the charts, reports and analyses provide invaluable information as we create future goals and strategies to enhance enrollment management.

What does the school learn from retention and attrition information? How does the school use this information?

Historical Numbers - Over the past ten years, Overlake's attrition has ranged between 3% and 6% with the average pegged at 4.7% which places us at half the NAIS national average for day schools and the NWAIS average.

We have planned openings in grades 5, 6 and 9. The majority of attrition occurs from 8th to 9th grade which is a natural transition point from middle to high school. Every year there is a small number of students who leave for a variety of reasons such as, moving or a desire for something we don't offer e.g. football or a larger student body.

Exit Survey - To obtain as much accurate information as possible regarding why a family chooses not to re- enroll, we employ the services of an independent third party consultant, Hardwick and Associates. Each non-returning family is contacted by phone and asked a predetermined list of questions. Verbatim responses are documented and a report summarizing the findings is delivered to us in June.

In the past, the information provided from the exit survey has resulted in program enhancements.

A couple of examples include: improving the advisory program by providing training and support so that the experience for both students and advisors is more uniform. A second improvement relates to the transition between middle and upper school. As a result of survey feedback, we begin early in grade eight to transition students into grade nine by inviting eight graders to specific social events, e.g. dances, eighth grade field studies, and offering a curriculum night open to eight grade

parents. A third group that has benefitted from survey information is counseling. Areas have been identified where the school can be more proactive to build awareness around social issues and interpersonal interaction. As a result, counselors are in classrooms routinely working with students and teachers in these areas.

The School has a financial assistance program that is designed and operated in a way that supports the school's enrollment management program.

Describe your school's financial assistance program and the philosophy behind the allocation of financial aid.

The financial aid program supports and reflects the mission of The Overlake School. Central to the mission of The Overlake School is a commitment to socioeconomic diversity among its students. To fulfill this commitment, the school maintains a strong financial aid program which seeks to ensure that an Overlake education remains accessible to qualified students regardless of their economic circumstances.

How does your school evaluate the effectiveness of its financial aid program?

The Overlake School Financial Aid Program adheres to fair and consistent procedures and policies that follow NAIS's principles of Good Practice for Financial Aid Administration. Results from the annual survey sent to enrolling and non-enrolling applicant families asking for feedback about the financial aid program are carefully reviewed. The annual report to the Board and on-going discussions with the Head of School allow for evaluation and analysis.

The question was raised in the 2007 Visiting Team report regarding the sufficiency of FA funding 90% of demonstrated need based on 7.5% of gross tuition revenues. While most peer schools fund at the 11-12% level, Overlake is typically at the low end of the list with our 7.5% funding. In 2008 when the economy plunged, funding was reduced to 85% of demonstrated need for most FA recipients due to the increase in the number of families who applied and qualified for FA support.

The current financial aid budget allows for awards to cover at least 85% of financial need for most students receiving aid. Additionally, students from the three under-represented ethnic groups and students that qualify for 100% of tuition in aid, receive 100% of their financial need. Currently, additional funding for Overlake transportation and extended education trips offered through our Project Week program is also available for students receiving financial aid.

In 2007, The Overlake School was selected by The Malone Family Foundation to receive a \$2 million endowment for the funding of educational opportunities for gifted students whose families demonstrate financial need. The Foundation's primary goal is to provide scholarship funding at the secondary level for students who are at the top of their classes and have the desire and drive to maximize their potential, but have limited financial resources to attend independent schools. This fund has allowed Overlake to enroll academically talented and motivated students. We typically have three to four Malone Scholars enrolled during any given year.

In addition to budgeted financial aid, transportation and Project Week assistance, endowed Scholarships and restricted funds are available to support students who qualify under the guidelines of the particular funds and qualify for financial aid. In 2013, The Overlake community expressed their support for financial aid by contributing over \$210,000 to the financial aid Fund-a-Need item at the Overlake Auction. This fund will provide tuition assistance for two students to attend four years of upper school.

In the spring of 2014, a small group of parents produced an Overlake cookbook with profits designated as a financial aid fund raiser. Beginning with the 2014 graduating class, parents are asked to donate to the senior class legacy fund which benefits financial aid. These efforts along with the annual fund drive asking donors to give to financial aid, assist in supporting the financial aid fund.

In the past, tuition remission has been available to students of employees (50% of tuition for full-time employees). Starting in 2014-15, this program has been discontinued. Employees hired during the 2013-14 school year and prior years are grandfathered into the program. Their children, born and unborn, are eligible for tuition remission. The program was discontinued for a number of reasons.

First, tuition remission was listed as a benefit. Since it was not available to all employees the policy created unequal access. Therefore, it actually was not a benefit available to all. Second, the school decided to focus on providing access to enrolled students who have demonstrated financial need. Funds from the tuition remission program will be added to the financial aid budget, increasing assistance for the students who qualify for financial aid.

The school has determined the desired number of students and achievable enrollment targets for the next three years or longer.

Describe the school's desired enrollment for the next three years.

Our enrollment goal is 530- 535 students which is where we have been for the last five years and where we plan to remain for the next three years. Our facilities were built to accommodate this number. There is some flexibility to slightly over-enroll as needed.

Middle School Enrollment: 5th grade 32; 6th-8th grades 64 students in each grade = 224 students

Upper School Enrolment: 9th and 10th grades 80 students in each grade 11th and 12th grades we generally add students only if the number drops below 75 in each grade = 310

What factors or challenges impact the desired level of enrollment?

Although we have consistently met or exceeded our enrollment goals, we exist in a changing admission landscape. Demographic projections indicate an increase in school-age children of 2.0% in Seattle and 1.7% on the Eastside. While any growth is promising, we face several potential challenges.

- Competition from other independent schools. Over the past ten years, many sending schools have increased their enrollment numbers and added middle schools. Several peer schools begin at grade six which provides many openings for applicants, and they have also increased the enrollment of their upper schools which provides more options for applicants at that level.
- Necessary tuition increases – more families are either not considering independent schools or leaving independent schools for lesser expensive private schools or non-tuition public schools.
- On the Eastside the public school districts offer strong and enticing programs with no tuition costs, such as gifted programs, choice schools and International Baccalaureate schools.
- The first charter schools in Washington State will open in the fall of 2014. At this time their potential impact is largely unknown. Although we can anticipate that initially a number of families will be attracted to the idea of a charter school which may deter them from applying to an Independent school.

The School has sufficient resources to conduct its enrollment management program.

Describe how school resources (personnel, materials, equipment, and funding) adequately meet the school’s enrollment management goals. (Consider admissions, recruitment, retention, and financial aid in responding to this question.)

There were several areas related to school resources and support listed in the 2007 Self-Study Visiting Team’s Report regarding enrollment management and financial aid that are worth noting.

“The need for a cohesive, unified, and comprehensive marketing plan to include admission needs.” (p.49) Since the 2007 self-study recommendation, there has been minimal progress in developing a comprehensive marketing plan until recently.

In April 2014 the newly created and staffed Director of Communications position became a reality. The Communications Director is an integral part of the Institutional Advancement Team composed of the Directors of Communications, Development and Admissions. One of the goals of the Advancement Team is to create this cohesive, unified, comprehensive marketing plan which, ideally, will allow us to maximize our resources, provide a stronger voice, and clearer identity.

“Expand the Admission staff for community outreach and marketing purposes.” (p.50)

With the sudden 28% increase in applications in 2009-10, the admission staff focus shifted from outreach and marketing to processing the dramatic increase in applications. In 2009, a part-time 0.2 FTE seasonal position was created to assist in processing applications. Out of necessity, as applications continued to grow each year, so did the part-time position which is now a 0.4 FTE person.

Presently, Admissions is minimally staffed. If applications continue to increase, as they have for the past five years, we must add additional staffing. Filling out the 0.4 FTE position to a full-time position would enable us to reassign more time to both the financial aid part of the department and

more fully meet the admission duties. Further comments follow regarding staffing under “Recommendations point 2.”

One of the strengths of the applicant review process is the inclusion of the faculty and administrators as members of the Admission committees. Participating in the process is a significant commitment of time and energy in addition to regular responsibilities. While training is provided, there is a steep learning curve where one learns by participating.

Because individuals have many responsibilities, recruitment and retention of readers can be challenging. It would be beneficial to the admission selection process and the school community as whole to promote the opportunity to be part of a review committee as a valued and essential aspect of evaluating applicants and building our student body.

What are the school’s overall strengths in regard to its enrollment management program:

The world of admissions and financial aid is changing quickly within a dynamic environment. There are two perspectives to consider: the micro and macro lenses.

Micro Level Strengths relating to The Overlake School internally:

- Streamlining the online application process by using the Secondary School Admission Test (SSAT) in place of the Independent School Entrance Exam (ISEE). Benchmarking our currently enrolled students using the SSAT provides more accurate information for accessing applicants. Also, reading files online, reorganization of open house format and visit day activities are areas of progress that strengthen our process.
- On-going success in meeting or exceeding enrollment goals.
- High retention and low attrition numbers indicating success in enrolling and retaining mission appropriate students.
- Professional, friendly, supportive relationships with various constituencies.
- Well organized and efficiently managed admission and FA department.
- Flexibility and adaptability to adjust “in the moment” and “looking ahead” as we manage large increases in applications.
- Using available resources effectively – requesting additional support as needed.
- Faculty involvement in the applicant review process by creating well-balanced committees with representation from the academic departments, counseling, athletics and the library. The broad representation enriches the discussion by providing numerous perspectives.

Macro level strengths relating to The Overlake School externally:

One of our goals, which benefits potential applicant families, all area independent schools, and specifically Overlake, is to be a part of the collegial and collaborative efforts of the regional admission directors.

- The Puget Sound Independent Schools (PSIS) consortium.
 - Overlake has been a leading participant in creating the Puget Sound Independent Schools (PSIS) consortium whose goal is to assist families in learning about and experiencing the options of the independent school world. As a founding and

current member of the PSIS Steering Committee we have established a model of cooperation and sharing resources in areas such as creating the PSIS website, common forms, coordinating consortium outreach fairs, test dates and open houses. PSIS is a non-profit, dues-payment organization.

- Ravenna Online
 - Our collaboration with Ravenna in research, development and production places us at the leading edge of this technology which created a common online application and document management system for area independent schools. For applicant families, the time saved and ease of applying once, online is immeasurable. Most of the independent schools in the Puget Sound regions are part of the Ravenna system.
 - The “green” aspect of managing applicant files online from start to finish is appealing and convenient for admission departments.

- Current and continued support by the administration in the form of time-away and funding to host and participate in local, regional and national professional development activities provides the resources needed to be an active leader and contributor in the admission arena.

What areas of growth and/or recommendations does the school have in regards to its enrollment management program:

Enrollment Management

- With the newly formed Institutional Advancement team, we have the opportunity to creatively and effectively maximize the use our website, other social media avenues, and printed material as dynamic marketing and recruitment tools. The “fresh eyes” approach when presenting a deeper and broader look at our programs and sharing more freely the many successes of our students including bios of alumni, will advance our efforts to capture the interest of potential applicant families.
- If applications continue to increase, we will need to consider how to best reorganize the various activities related to the application/admission process. Providing adequate staffing will play a major role in these discussions.
- Improved coordination with the appropriate departments would provide needed support when planning and hosting Admission activities to address needs relating to: the physical space where guests are greeted, parking, and shuttling. This initial experience forms an early impression of the Overlake community and campus. Details such as the size of the room, lighting, color, and sound system quality all play a role in forming this impression. Parking and shuttling guests is an ongoing area of concern for Admissions. We are perennially searching for a friendlier, more efficient way to accommodate guests.

Financial Aid

- Currently, our financial aid budget is based on 7.5 percent of gross tuition revenue. According to the “NWAIS Facts at a Glance,” schools participating in the survey calculate their financial aid budget using an average of 11.1 percent of tuition revenue. In order to increase the amount of funds necessary to enroll and retain students as tuitions continue to

grow faster than household incomes, we need to find a way to increase the percentage of gross tuition revenue used for financial aid.

- In the future, our goal to increase the endowment to fully fund the financial aid program will allow us to consider awarding 100% of financial need to more students who apply. This is true to our mission and will help create more access for the students we would like to enroll in our school.
- As there is an increased demand for financial aid, it may be time to initiate a “need-aware “ rather than “need-blind” policy which would enable us to more effectively implement our enrollment management goals. Such a conversation would benefit the process, our community, and the applicants.

Documents Provided:

- The Overlake School Admissions & Financial Aid Application Materials
- Enrollment Statistics
- Any written policy statements related to the school’s enrollment management program
- Financial Aid Chart & Financial Aid Policies

Human Resources

Section Writers: Warren Gilles, Business Manager, Sean Clark, Controller, Tom Frizelle, Director of Technology (Past Employee), Margaret Lynch, Assistant to the Head of School, Chris Williams, Board President, Doris Jackson, Annual Giving and Events Manager, Sandra Mocanita, Accounts Payable, Becca Flora, Math Faculty (Resident Outsider)

Date Completed: April 2014

STANDARD: 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.

The School has effective hiring practices that result in well-qualified employees sufficient in number to support the school's program.

The Overlake School uses a committee approach for hiring. This helps ensure that new hires are both well-qualified, and that the needs and interests of affected departments are represented.

Are there any areas in which the number of school employees is inadequate to support the program? If so, describe any plans the school has to address any identified issues.

Overlake feels the current number of employees does adequately support the program, but has found areas to enhance this support. In 2013, Overlake recognized the opportunity to improve the academic program by restructuring the full-time teacher load from five classes to four classes. The goal is to provide additional time and increased opportunities for student support, faculty collaboration and pedagogical improvement. This major change, resulting in an estimated 9 new employees, is scheduled to be implemented in the 2014/2015 school year.

In addition, the school is hiring a full-time instructional coach to enhance faculty support.

The school is also responding to growing needs for consistent and comprehensive communication to both internal and external audiences by separating communications from the development office to its own new department, and hiring a Communications Director to replace the current Communications Manager.

Other needs are continually being evaluated by department managers and administrators.

How does the school assess the qualifications of candidates and whether the candidate is a good fit for the school?

A hiring committee consisting of faculty, staff, department chair, and division head, considers all vacancies. The makeup, size and scope of this committee is dependent on the vacant position. Overlake utilizes a hiring document, which outlines:

- qualities expected of an ideal hire, including strategic goals
- an outreach process for key faculty and administrative positions
- how the search committee is formed
- how the interviews will be conducted
- feedback forms, ranking of candidates, job offers, and contracts

What background and reference checks are conducted to assist the school in assessing potential new employees?

All employees undergo both a background check online through the Washington State Patrol, and a national background check through HireRight. Applicants are requested to submit 3 references, which are contacted by the hiring manager before a position is offered.

Describe the orientation and training program(s) for new employees.

Employee Handbooks: The school maintains a staff and faculty handbook that reflects relevant policies and procedures for school employees. The handbooks are available online and employees are annually required to confirm via signature that the handbook has been read.

Orientation: Three-day program that provides vital information and training in systems and processes used while working at Overlake. It also provides an opportunity to become familiar with the campus and teaching spaces. Topics in the orientation include:

- Overlake and its Organization
- Blood-borne Pathogens training
- Campus Tour
- Technology
- Diversity
- Human Resources
- 1st Aid & CPR
- School Schedule
- Academic Support Services
- Counseling and Advising
- Clubs
- Supplies/Textbooks
- Your 1st Year Evaluation
- Student Policies - Attendance, Discipline
- Parent Communication

Faculty Mentoring: In addition to the orientation and handbooks, all new faculty are assigned with a faculty mentor. The mentorship program provides support to teachers new to the Overlake School, including:

- a confidential relationship tailored to the expressed needs of the mentee
- guidance as to how the school functions
- opportunities for collaboration
- opportunities for classroom visits
- regular opportunities for questions and discussions
- Monthly Meetings with administrators

The school has compensation and evaluation systems in place that are well thought through and are clearly communicated to employees.

Since last accreditation, Overlake has spent considerable time ensuring that our employee compensation is both in-line with market, and effective in attracting quality candidates. The school's Personnel Committee, comprised of administrators, faculty, staff and industry professionals from the community, works to establish the policies/procedures below. The committee continually evaluates these policies for relevance to the overall mission of the school.

How does the school determine compensation for faculty, administrators, non-teaching exempt staff, and non-exempt staff? Describe how it is reviewed relative to the market.

Compensation for faculty is based on a salary scale. This scale considers a faculty member's teaching tenure and level of education. Each year, the overall scale is compared to a select group of peer schools with a goal of being 5% above the average of these schools. The scale is adjusted annually by a rate of inflation as reported by U.S. Labor Bureau. If the scale is not in line with the goal, the personnel committee may recommend an additional adjustment to the Board of Directors.

Similarly, exempt and non-exempt staff salaries are compared to like positions as reported biennially by Washington Employers. The goal is for staff, in aggregate, to be at 5% above the average of these comparative positions. Supervisors can also make recommendations to the Head of School for specific merit increases based on annual evaluations.

Administrative salaries are compared annually by the Head of School, in consultation with the Chair of the Personnel committee, to similar positions using NAIS data. The goal for administrative salaries is to be at or near the 75th percentile of comparable schools.

Describe the evaluation system(s) in place at the school.

Faculty: Evaluation is an integral part of professional growth, feedback and development at Overlake. All faculty are evaluated once every three years with the exception of faculty who are new to Overlake. New faculty are evaluated in each of their first two years before they are placed on the three year rotation.

The Upper and Middle School Heads are responsible for faculty evaluation. The process involves a number of steps including pre and post evaluation meetings, lesson observations, student feedback surveys, input from department chairs and the US Dean of Students as well as observations of community involvement including advisory. At the end of the year, the division heads process all parts of the evaluation and summarize them in a formal write-up. This summary uses the published "Expectations of Good Teachers" document as a template which is provided to faculty at the initial

meeting. If a faculty member disagrees with any portion of the summary, they may write a response that is included in the final document that is provided to the Head of School.

Staff: In 2012 a team of staff and administrators set out to create a new staff review process that focused on frequent feedback between staff and supervisors. This pilot process was adopted for the review cycle beginning in 2013/14, and involves the following highlights:

- Every year, staff members complete a Staff Self-Evaluation and Draft of Goals worksheet. The worksheet is completed by the staff member and reviewed with their supervisor. In addition, both the employee and supervisor complete a separate staff evaluation form. If there is a difference of more than 2 points between and among scores, then the supervisor must address this discrepancy in the performance evaluation.
- The formal review is typically scheduled in May. In addition to covering the above items, this meeting is used to schedule meetings to discuss goals/feedback throughout the year. This serves to facilitate frequent communication related to staff goals and any areas of concern.
- Every other year this process is augmented with peer feedback from five co-workers. When possible, the feedback is from both colleagues in the same department and other faculty/staff that work closely with the staff member. This feedback is collected and reviewed by the supervisor and presented to the staff person as a summary of strengths, and/or areas of concern.

Administrative Staff: Administrative team members are informally evaluated by the Head of School every year. The Head of School solicits feedback from faculty and staff for each administrator. This feedback is presented as a summary of strengths and/or areas of concern along with any direct feedback from the Head of School. The review typically occurs in the spring. Additionally, the Head of School has regularly scheduled meetings with each administrator to check on goals and provide timely feedback.

How does the school communicate to employees its compensation and evaluation systems and the procedures and policies for implementation?

All employees are given information regarding overall inflation increases and any goal-related adjustments during faculty and staff meetings conducted by the Head of School annually. Specific salary information and evaluation results for administrators and staff are communicated in person during the annual review process.

The school has a strong professional development program.

Describe the school's professional development program for all categories of school employees and how the program is used to enhance employee skills and knowledge.

Overlake is committed to maintaining the highest standards of both teaching and educational administration, and to providing opportunities for professional development for faculty, staff and administrators. Overlake annually allocates budgeted funds, and every Overlake employee is

encouraged to take advantage of a professional development opportunity. Overlake also pays 50% of tuition for any classes that directly relate to the employee's job. A standard application form is used which must be approved by the supervisor or Department Head and submitted to the Head of School, who then approves or denies the request.

Faculty attend conferences or workshops in their areas of expertise to, for example, become a better teacher, to prepare them for advances in technology, or to collaborate with other colleagues in their disciplines. Staff attend trade appropriate conferences and workshops to learn new skills. Examples include: how to be more effective and efficient in work areas, to learn new software to teach colleagues, or to learn more effective coaching skills.

Overlake is fortunate to have a sabbatical program available to employees with ten or more years of service to the school. One sabbatical can be granted each school year. Those wishing to pursue a graduate degree in the teaching field, or an independent study that will add to the employee's expertise in their work at Overlake, can apply. Applications are reviewed and decisions are made by a committee of the Head of School, Upper School Head, and Middle School Head.

The school also awards a \$1,500 grant annually to an employee wishing to pursue any new or life-long interest over the summer.

Finally, the school provides in-service days to faculty, regularly hosts NWAIS conferences, and invites guest lecturers. These agendas and topics for these opportunities vary annually depending on schedules and current focus areas.

What amount of money was spent on professional development during the most recent full academic year?

For the 2012-2013 school year \$80,700 was spent on direct Professional Development. This amount does not include salary and benefits for the sabbatical recipient, in-service days, or other guest lecturers brought on campus.

How is the effectiveness of the school's professional development program assessed?

At present, there are no formal procedures to evaluate the effectiveness of the professional development program. Supervisors and department chairs are encouraged to follow-up with employees for feedback on the effectiveness of their professional development experiences.

Sabbatical recipients are expected to formally present their experiences to peers upon their return, and to encourage others to apply.

The school regularly reviews its compliance with applicable employment-related federal and state laws to manage risk.

How does the school review its compliance?

Overlake has a Personnel Committee comprised of administrators, faculty, staff and industry professionals from the community to make salary and other HR related recommendations to the board. The parent members are industry professionals in HR and employment law. The school's

business office receives regular updates and counsel from its auditors, payroll firm, pension firm and insurance brokers. When warranted, the school will also seek counsel from local HR attorneys.

Are there any areas of non-compliance? If so, how does the school intend to address these areas?

There are currently no known areas of non-compliance.

The school has an effective process for communicating essential human resources related information to employees.

How are employees informed of changes to benefit programs?

Overlake's business office communicates benefit program changes to employees via email and benefit web portal. When warranted, the business office will also facilitate information sessions with the school's insurance broker, pension firm and other benefit providers.

How are employees informed of state and/or federally required information?

Legally required communications of benefit changes and other information is sent (electronically or by mail) in accordance with law. Labor law information is posted prominently in the faculty/staff lounge and updated on a regular basis.

How are employees informed of performance assessment, compensation, and contractual expectations?

Employee performance assessments are communicated to employees by their supervisor during the annual performance review. Compensation and contractual expectations are outlined in the annual or seasonal contract signed by the employee and head of school. Additional code of conduct and employment expectations are outlined in the employee handbook.

What are the school's strengths in the area of human resources:

The quality education provided by Overlake is a direct reflection on the quality HR focus of the school. Some of these strengths include:

- Business Office has high knowledge of HR practices
- The Overlake hiring process is one that is fully engaged with active participation by all levels of faculty and staff
- Salaries and benefits remain highly competitive within the field
- There is oversight by a personnel committee that includes outside industry professionals
- There are effective checks and balances in place to ensure that established advantages continue.
- Incredibly low attrition

What areas of growth and/or recommendations does the school have in the area of human resources:

The school does not currently have a formal review system in place to evaluate the use and/or effectiveness of professional development annually. A review could be a useful tool in planning for on-going offerings and opportunities.

The Administration Team, while conducting informal reviews with the head of school, could benefit from having a more formalized process in place.

The school has done much work focusing on hiring a diverse community, but has struggled seeing desired results. More work analyzing available data and seeking new methods for better results would be recommended.

Documents To Be Provided:

- Employment non-discrimination statement(s)
- Any personnel handbooks
- Copies of any forms used in employee evaluation and supervision

School Plant

Section Writers: Warren Gilles, Business Manager, Joe Peterson, Board Member, Lance Delay, Director of Facilities, Matt Haddock, Maintenance Personnel, Sara Wilcox, Physical Education & Health Chair, Erin Gabriel, Arts Chair, Tom Frizelle, Director of Technology (Past Employee), Kent Renno, Director of Outdoor Education

Date Completed: April 2014

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

The school's physical plant supports the school's program in a manner consistent with its mission.

Discuss the functionality of the physical plant and its appropriateness to the educational program of the school.

The Overlake School's 73-acre campus houses 17 buildings and several outdoor learning environments that help the community deliver a rigorous college-preparatory education. These spaces allow for a collaborative environment where students can feel comfortable learning and growing. The Overlake School Plant does meet the needs of the educational program. The plant had several buildings either re-built or renovated to better suit the needs of the students, teachers and staff in the last 5 years. They were Armstrong Humanities 2009, Technology and Language Center 2010, Francisco J. Grijalva 5th/6th Grade Center 2011 and Campus Center remodel 2011. These buildings were a collaborative effort by committees that included Administration, Faculty, Staff and Board Members. Classroom sizes, meeting rooms and hallways were discussed and agreed upon through these committees to ensure the most useful space possible. The Overlake School plant has classrooms that can accommodate the school's maximum class sizes and has the appropriate technology to meet all the needs of the teachers and students.

The school demonstrates an ability to sustain the school's current plant and location for at least a three-year period, or alternatively, has a realistic and sustainable plan for change of plant or location.

Does the school have a plan for changing its facilities within at least the next three years? If so what are they? Describe the priorities of this plan and how they were developed.

There are no major upgrades planned at this time to the existing facility.

If the school leases its campus or facility, what are the terms of the lease?

The School owns the property for the campus. There is no lease.

If the lease is scheduled to expire before the next accreditation visit, what plans does the school have to address this?

Not Applicable

The school demonstrates long-range facilities planning that is incorporated into the school's strategic and long-range financial plans and addresses plant maintenance, improvement or expansion as correlated with projected enrollment, program growth, or institutional development and change.

Describe the respective roles of the administrative staff and the governing body in relation to decisions affecting the physical plant.

The administration compiles an annual capital expense list comprising items that are needed for each classroom, building, or outdoor space. This list is augmented by requests from all faculty and staff for upgrades or additional equipment. The combined list is reviewed by the Head of School and the Business Manager. They prioritize and determine which projects should be done in the next budget year. The Business Manager then communicates to the employees what projects or equipment has been approved. These projects or purchases are then carried out during the next budget year. The Buildings and Grounds Committee of the Board is informed at regular meetings about the larger projects throughout the year. Significant plant upgrades are discussed in Board Committee, and once approved, are carried out by administration with updates to the Buildings and Grounds Committee at regularly scheduled meetings. The Board of Trustees working with the Buildings and Grounds Committee are also responsible for Campus Master Planning. This plan is incorporated into the school's strategic plan which is discussed and approved by the Board of Trustees.

What are the long-range facilities issues facing the school?

The oldest building on campus is the Math/Science building built in 1989. The building is at capacity and the classrooms are adequate but upgrades would enhance the delivery of the academic programs. The school is just beginning a campus master planning process that will address this building along with relocating students out of two smaller portable classrooms and into regular buildings. Other potential facility improvements are: better exterior lighting, expanded parking, converting two grass fields to artificial turf and upgrades to HVAC control systems. These items will also be discussed in the campus master planning process.

The school demonstrates annual and long-range budgeting practices and adequate asset allocation to support plant occupancy, maintenance, and safety.

Is the school's budget for operating its plant sufficient to permit needed repairs to be made in a timely fashion, to assure functional adequacy to support the program and to maintain safety of building occupants? If not, what are the plans to remedy the situation?

The school's plant operating budget is built to maintain the campus in working order. All repairs are made in a timely manner to ensure functionality of the building and the safety of all occupants. There is currently no deferred maintenance on the buildings.

Describe plans for the ongoing maintenance, replacement, or improvement of the current school facilities. Who is responsible for the oversight of these plans?

The school has a plant, property, repair, replacement, special maintenance fund (PPRRSM) in place to handle any unexpected large expenses. The Business Manager and Director of Facilities maintain a PPRRSM list for each building or area. This list shows an estimated cost and estimated date for replacement. The school updates this list each year or when items are added or removed. The fund is currently at a sufficient level to handle multiple large expenses. The school has been adding to the fund annually, with a goal of 10% of operating expenses. The Buildings and Grounds Committee of the Board is responsible for oversight of these plans. Replacement of any facility would be initiated by the Board of Trustees.

The school has adequate systems in place to support the technology needs of the program and the administration.

Is the school's budget for technology sufficient to provide the necessary infrastructure (hardware and software) needed to support the school's program and administrative functions? If not, what are the plans to remedy the situation?

Yes, the technology budget reflects best practice and is currently at 1.3% of the total school operating budget. Computers and software are updated regularly and money is set aside for innovation and experimentation as new technologies become available. In addition, the funds are set aside each year in a reserve account to accommodate large technology purchases and upgrades.

Describe plans for upgrading, servicing, and replacement of the school's hardware and software. Who is responsible for the oversight of these plans?

Technology is constantly evolving, with new technologies increasingly available. The technology department stresses balancing the potential of emerging technologies with the Overlake community's needs. In general, our computer hardware is replaced every three to five years. Software is kept up to date **and/or replaced as needed. The Director of Technology oversees the Technology budget and reports directly to the Head of School**

How is the school strategically assessing and planning for its future technology needs?

The Director of Technology and Technology Team make routine technology decisions. The Director of Technology in collaboration with the Head of School and Technology Committee plan technology strategy. The Technology Committee is comprised of faculty, staff, administrators and parents. Technology decisions are also informed by the school's strategic plan, departmental audits and self-studies. Technology staff regularly attends workshops and training sessions. In addition, we encourage faculty to attend educational technology conferences and learn from other leaders in the field.

What are the school's overall strengths in regard to the school plant:

The school has newer buildings that support the academic program, most of which were constructed within the last 15 years. The school has a generous budget to maintain the operations of the school. Further we have a PPRRSM fund to help with any large unforeseen capital expenses. These new buildings completed the school's previous campus master plan. The school is just beginning a new campus master planning process to guide the direction of the school's plant. This plan will be part of the new strategic plan that the Board of Trustees has just undertaken.

What areas of growth and/or recommendations does the school have with regard to the school plant:

The school is evaluating areas of the physical plant for inclusion in the campus master plan. This plan will be part of the school's new strategic plan. The athletic fields, math/science building and administration buildings have been identified as potential areas of focus for this planning process. The school should also undertake an evaluation of work load for the facilities department and determine if there are adequate staffing levels. It should also determine if the facility should be staffed differently with a focus on evening and weekend events maintained over time in a manner that is sustainable.

Documents Provided:

- Campus Master Plan
- Recent reports related to the school's physical plant from any regulatory agency

Health and Safety

Section Writers: Kent Renno, Director of Outdoor Education, Jenni Baldwin, English Faculty, Mike Fine, Athletic Trainer, Tom Frizelle, Director of Technology (Past Employee), Matt Haddock, Maintenance Personnel, Doris Jackson, Annual Giving & Events Manager, Amanda Lopez-Castanon, Food Services Manager (Past Employee), Margaret Lynch, Assistant to the Head of School

Date Completed: February 2014

STANDARD: 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.

School evaluates risks to the health and safety of students and develops, reviews, and disseminates policies and procedures with the goal of reducing hazards to health and safety.

Articulate the underlying beliefs about the school's responsibility for the health and safety of students both on and off campus.

The founding principles of The Overlake School's health and safety policies were crafted with the overarching mindset to mitigate risks as much as possible and operate under the belief that our students are responsible. Though we work hard to minimize risks on and off campus, student responsibility and choice are a key part of our foundational beliefs and mission statement. Further, providing opportunities for students to exercise their responsibility is a key element of our health and safety practices. We aim to cultivate students who are not only academically minded, but critical, independent thinkers, and responsible young adults. Our ultimate goal is to provide our students with a reduced-risk campus, but also to allow students the freedom to make responsible choices. We have carefully laid plans in place to react thoughtfully to risk-inherent activities and emergency circumstances which are sure to arise on any campus. We know that students will be responsible for their own safety and health someday, so our school's health and safety practices are designed to provide opportunities for students to take some ownership of their own health and safety while they attend Overlake.

How does the school evaluate and review its health and safety policies and practices?

Health and safety policies are formally reviewed at the beginning of each academic year by the Risk Management Committee, but are also reviewed on an ongoing basis by the committee at regular intervals throughout the year. School-wide policies are reviewed annually by a co-chair of the Risk Management Committee to ensure that all policies and procedures are still relevant and fit the school's ever-changing landscape. The process of evaluation and review is handled differently for

various departments and circumstances. The Risk Management Committee works globally as well as specifically with department chairs and key individuals to evaluate risk on an annual basis in four key areas: school-wide policies, athletics, outdoor education, and Project Week. The Risk Management Committee meets regularly, attends conferences, and provides professional development for faculty and staff to oversee school-wide health and safety policies. Additionally, some members of the Risk Management Committee work closely with outside auditors and representatives from local and state safety and health agencies (i.e. fire marshals, the health department, OSHA, etc.) to evaluate health and safety policies. These outside auditors provide formal evaluation of our health and safety policies. Further, after drills, safety procedures, safety reports, and emergencies occur, team leaders from the Risk Management Committee meet to assess and reflect on the problems that arose. Policies and guidelines are then amended to reflect learnings from these events, so our health and safety policies remain constantly up-to-date and evaluated. We realize our health and safety policies are living documents which need constant reviewing.

How are parents and students made aware of these policies and procedures?

Overlake has a MS and US handbook with a section entitled Emergency Procedures. This section addresses student illness, emergency medical forms, school closures, the medication dispensing policy, and fire/earthquake drill procedures. The MS and US handbooks are recommended reading for all parents and students. The administration also communicates to parents when situations arise, particularly to educate parents after an event that has occurred on campus, with regard to how they should proceed in picking up and debriefing with their child.

What provision is made for faculty and staff instruction and review of these safety procedures? How is the effectiveness of this training evaluated?

The Emergency Handbook, the compilation of all safety procedures, is available to all faculty and staff on the school's secure website and is also posted in multiple places (near the first aid kits) in each building. Also, in each classroom, is a one-page Emergency Information Quick Reference that lists procedures for the more typically occurring emergencies such as fires, earthquakes, injuries, power outages, etc.

New faculty and staff are instructed on the emergency procedures during their New Faculty Orientation meetings at the beginning of each school year.

The Risk Management Committee sends out reminders of the emergency policies/procedures before lockdown and earthquake drills. The committee also trains faculty members involved in fire drills, lockdown drills, earthquake drills, and specifically designated Building Marshalls (see Emergency Personal Handbook for Building Marshall description).

All employees of the school are trained in CPR/AED and First Aid and re-certify every two years. Through this training employees are also told about emergency procedures at Overlake.

The effectiveness of the training is evaluated by having an observer and obtaining feedback after earthquake and lockdown drills. During fire drills, the time it takes for everyone to leave the buildings, assemble at the Advisory Meeting Place, and take attendance is recorded each time for assessment of the drill's effectiveness and efficiency. Each Incident/Injury form that is filled out is also reviewed by members of the Risk Management Committee and the administration team to

make sure that emergency procedures are being followed, as well as to revise and update trainings and procedures as needed.

The Risk Management Committee solicits outside community feedback from local emergency medical services following emergency situations to facilitate an on-going self-study of Overlake's safety procedures.

How does the school promote nutrition of children?

The school promotes nutrition through our Food Services Program by providing complete meals for our students and staff and through 8th grade Health class and 10th grade Lifeskills class curriculum.

The Food Services Program provides complete meals consisting of daily protein, starch, and vegetable selections in our hot buffet area. Our cold salad bar is stocked with freshly prepared items that are both raw and cooked, including fresh fruit and vegetables, legumes, beans, roots, whole grains, etc. Breakfast items vary but incorporate the same principles of providing protein, starches, fresh-cut fruits, and whole grains, etc. at breakfast daily. We also serve protein options such as tofu at each meal. We offer portions that are appropriate to the age and size of our student body.

We keep a myriad of snacks available for our students, keeping in mind that there should be varied choices on hand to give students the option to make decisions. Thus, our snacks provide lessons in nutrition by choice of items. Our snack offerings include many healthy items such as shelled nut packages, trail mixes, whole fruits, vegetables, fruit and veggie chips, yogurt cups, nondairy ice cream bars, whole wheat bread products, etc.

We strive to meet the dietary constraints and choices of those who dine with us by offering selections that are gluten-free, dairy-free, vegan, vegetarian, nut-free, and allergy-free. We work with knowledgeable staff, parents and families of students with special dietary needs to provide proper offerings for those students. The kitchen staff is available for students who have questions throughout the day. We notify students of ingredients which may contain allergens with clear signage in multiple locations.

We contract with local food vendors and purveyors who have the ability to provide many locally farmed, sustainable, fresh foods and supplies, keeping abreast of any recalls, withdrawals and safety alerts.

Food is made available to students throughout the day. We serve breakfast daily and the kitchen is open throughout the day for snacks to help students maintain optimal brain power.

In the 8th Grade Health class a unit introduces students to basic elements of nutrition. To meet the goals of the nutrition unit, students:

- Watch the *Super-Size Me* film and discuss student reactions.
- Take a “field trip” to the cafeteria with the Director of Food Service to discuss daily nutrition choices available to the community and decisions made by the kitchen staff.

- Participate in a meal planning exercise with focus on balanced diet, basic food groups, and nutritional needs.
- Complete an assignment that compares and contrasts foods for nutritional value.
- Requires students to document and evaluate their own nutrition, exercise, and sleep habits in a journal-format.
 - Nutrition is also incorporated in a 10th Grade Life Skills Unit on health and self-care. Students focus on making healthy choices as they learn and apply the principles of nutrition through these activities:
- Presentation on nutrition, including basic elements of nutrition, and daily USDA nutritional recommendations for teens.
- Field trip to PCC (Puget Consumers Co-op) guided by a Bastyr University nutrition educator.
- “Choose My Plate” exercise wherein students determine daily caloric needs and create a customized food plan based on research of USDA recommendations.
- Students identify current healthy diet habits and identify several diet habits that they want to change to improve their nutritional choices.
- Food Stamp Challenge: Working in teams, students create menus and shopping list for a week of nutritious meals on a limited budget. Students determine daily nutritional needs, research recipes, and create a budget for the week.
- Family Meal Assignment: Students plan, prepare, serve, and document a nutritious family meal. Students practice meal-planning and cooking skills with a focus on creating a balanced, nutritional meal to share with their families.

The school gives appropriate priority to operating its buildings, equipment, and grounds in a safe manner.

Describe the process to support the ongoing safety of the facilities, equipment, and grounds.

All of the following elements encompass Overlake's process of supporting the ongoing safety of the facilities, equipment, and grounds. Our Director of Facilities oversees these processes, policies, and procedures.

- The school strives to operate in compliance with all applicable building and safety codes.
- The Facilities Director oversees routine inspections and maintenance of all systems on campus including, but not limited to, fire alarm/suppression system, H/VAC and air quality, water supply, sewage, and equipment. County and city officials conduct all inspections.
- The Building and Grounds Committee meets monthly to discuss and review the needs of the campus. The Building and Grounds Committee not only discusses the facilities, equipment, and grounds, but also campus safety.
- Overlake follows ADA code in regards to safe accessibility to all buildings and grounds.
- Janitorial services are regularly monitored.
- Pest control is regularly monitored to maintain a clean and sanitary environment. If needed, pest control services are employed.
- Lighting is maintained for all buildings and grounds.

- All chemicals are stored in appropriate locations and disposed as specified by local codes and regulations. Measures are taken for chemical storage to be in accordance with safety guidelines.
- Limited access to all mechanical rooms is maintained.
- The ropes course and rock climbing wall are inspected annually by a certified American Rockwall Association Specialist.
- All school elevators are inspected monthly by ThyssenKrupp company.

The school implements plans to effectively supervise and instruct students with attention to their safety.

How does the school provide for the supervision of students, particularly during non-class times?

The Overlake School is a closed campus. We expect students to be in school from first block to dismissal, attending all classes and activities, Monday through Friday. However, seniors with a free first block may report to school before homeroom or announcements begin. Overlake has policies and procedures in place to promote the safety and wellbeing of all students while school is in session and during non-class times. When school is in session students are either in class, on their way to class, or are otherwise supervised.

Our attendance reporting procedures account for students during the school day. Parents are asked to report a student absent or tardy. The Front Office reconciles this information with class attendance reported by teachers.

Students who arrive at school before 8AM must go directly to the Campus Center or the school's Library, both of which open early. Some students may have a zero period class and should go directly to class. After school, the Library is open for students to study or wait for their parents or guardians. Middle School students must sign in and sign out of the Library. There is always a maintenance employee on campus until 10 pm daily. The Head of School and the campus caretaker live on campus for emergency situations after hours.

Students are not allowed on the trails surrounding the immediate campus for non-school related activities during the school day. Likewise, students are not allowed to visit their vehicles during class hours to retrieve forgotten materials. These policies are in place to keep students under close supervision during the school day.

Most home sporting events are on campus but some are off-site. Overlake provides transportation for students to offsite activities. If these sites are local, parents will often pick students up directly from offsite sporting events. Coaches are required to remain with students until last student is picked up.

For evening activities, an adult remains on campus until students are picked up. We have an expectation that when buildings are closed down, they are cleared of students. The last adult leaving a building is responsible for vacating students from the building. Buildings auto-lock at pre-determined times based on usage (i.e. the gym is open later). Key cards cannot be activated to open doors between midnight and 4:30 am.

What practices and procedures are in place to address the safety of off campus activities (i.e. outdoor/experimental education, field trips, and international trips)?

Off-campus activities are supervised by various personnel and departments. Each department's practices and procedures are detailed below.

In regards to transportation, all personnel (including faculty, staff, coaches, and outdoor instructors) who drive students in Overlake vehicles must meet minimum criteria and take a Drivers' Training class with the school's Transportation Director. All Overlake buses are scheduled for regular maintenance three times a year. Maintenance is performed by Harlow, a company that specializes in school bus maintenance. We also keep our buses up to school bus safety standards. Please see the Driver's Training Document in the appendix for more details on transportation safety practices and procedures.

The Outdoor Program has an Instructor Manual, Policies and Procedures Manual, and an Emergency Response Plan. Each Outdoor Program instructor must read, understand, and abide by the guidelines outlined in these three documents. Further, these documents are required to be taken on every Outdoor Program excursion. Appropriate Overlake administration members must also read these documents. The Outdoor Program Director pre-visits every location for each trip, evaluating the location and destination appropriateness for each specific group of students.

All Overlake Outdoor Program trips are led by a minimum of two instructors. These instructors are skilled outdoor professionals who have experience in working with students in wilderness environments. Instructors on each trip have CPR and First Aid certification, and either Wilderness First Aid or Wilderness First Responder training. Whenever possible, we provide both a male and a female instructor. We also attempt to have at least one of the instructors be a member of the faculty as we feel that it greatly enhances the educational value of the trip. At times, due to scheduling constraints, it may be necessary for a trip to include instructors other than Overlake faculty. In that event, both instructors are experienced outdoor professionals whose qualifications meet the strict standards of the Outdoor Education Program.

All Outdoor Program instructors are, first and foremost, guardians of the physical and emotional well-being of the students. They are also educators, leaders, and are responsible, experienced, and strong risk-managers. They shape the environment of the trip by structuring the activities and interaction, setting a tone, and acting as mentors and models of good behavior. Overlake's qualified Outdoor Program instructors help minimize risk on school trips.

Students on outdoor trips are given packing lists before each trip. This gear is checked by the Outdoor Instructors before the group leaves the school to make sure each student has the proper clothing and gear for the expected conditions. There are inherent risks involved in all outdoor activities. Students and guides travel in remote areas in the mountains, traverse uneven trails (sometimes in snow), and kayak in cold water lakes and rivers. Trips are offered throughout the year so the weather can range from sunny and hot to very cold and snowy. The school strives to responsibly manage these risks through pre-trip planning, by overseeing that students properly follow the packing lists, by teaching the students the various outdoor skills such as how to recognize hazards, and through the leadership and guidance of the experienced outdoor professionals leading the trips. Even though no prior outdoor experience is necessary on every trip, all students are

expected to participate in all activities to the fullest of their capabilities. Many will be asked to perform skills or fatiguing activities that they have never done before. It is through these outdoor adventures that individuals learn about themselves, their role in a larger group, and the outdoor environment. Our carefully overseen safety procedures and practices for the Overlake Outdoor Program help minimize risk.

Each year, every student at Overlake participates in a Project Week experience, many of which are off campus. The Project Week Program has its own manual which includes policies and procedures that are specific to Project Week. Each Project Week proposal is reviewed by a Project Week Committee which includes members of the Risk Management Committee. Each proposal also has a Risk Assessment Plan specific to each trip. If an outside contractor is used, the contractor must fill out a Contractor Form, which asks about experience in working with students, insurance, background checks, and first aid training, and emergency procedures. All faculty and staff leading a Project Week experience must be certified in CPR and First Aid. All Project Week safety procedures and practices are overseen by the Project Week Director and the Project Week Committee. All project leaders of international trips without medical accompaniment are required to undergo additional training.

All Field Trips must follow the Field Trip Policy, procedures overseen by the Risk Management Committee and the school administration.

For our off-campus sporting events, all away game facilities have to be cleared by the Emerald City League before the facility can be used for competitive play. We secure all off-campus facilities used for home games or home practices through King Country or Redmond Parks and Recreation. All facilities are vetted by city and county personnel as well as the Athletic Department Personnel before we use them. Coaches are mandated to supervise Overlake students at off-campus games and practices. We do not leave students alone regardless of the situation. Coaches are asked to use a "sign out sheet" or see parents "face-to-face" before they release students. All coaches and athletic personnel (paid and volunteer) undergo background checks. Please see section "23.0.0 Coaches" in the WIAA Handbook in the appendix to review all state-level safety regulations.

The Athletic Director sends out a coaches' bulletin that addresses seasonal information that is appropriate to review, much of which is safety-related.

Overlake only schedules athletic contests that are appropriate on the following grounds: age, development level, skill level, and the physical size of players.

Coaches are asked to complete an Injury/Incident Report if there are any situations that call for this documentation (i.e. an injury). Coaches are also asked to contact the school administration immediately (by phone) after a major injury or incident.

The Athletic Trainer is in constant communication with coaches on injury assessment and is kept abreast of the return-to-play progress of student-athletes. Our Certified Athletic Trainer also reviews the following elements during coaches' meetings:

- Medical Kits and Emergency Contact Forms
- Injury Forms

- Injury Assessment
- Return-to-Play Policy
- First Aid and CPR Courses
- Emergency Action Plan
- Sudden Cardiac Arrest
- AED locations
- Baseline testing/concussion management/concussion education
- The Lystedt Law

The school has written procedures to deal with health, accident, injury, and illness.

What practices and procedures are in place to address health, accidents, and illness at school?

Overlake's Emergency Handbook describes the school's plan for many different crises that may arise. Additionally, the school holds monthly fire drills, as well as both a security lock-down drill and a disaster (earthquake) drill once a year. The following practices and procedures are in place and overseen by the Risk Management Committee and the Overlake Administrative Team to address health, accidents, and illness at school:

- A yearly test of emergency alert system for parents, students, and faculty is conducted.
- Annual drills are completed for lock-down and earthquake preparedness.
- First Aid kits are located and maintained in all buildings
- Faculty, staff, and students are trained in First Aid
 - All employees undergo both a background check online through the Washington State Patrol, and a national background check through HireRight.
- AEDs are on campus in each building and training for AEDs has been implemented.
- Incidents on campus or during school-sponsored events are to be noted on a properly filed Incident/Injury Report.
- A Health Room is maintained in the front office.
- A school-wide paging system for lockdowns is in place and is tested annually.
- A school-wide door locking system is in place and is tested annually.
- All new employees are required to take or show proof of Blood Borne Pathogen training.

The following procedures and practices are in place to manage student health at Overlake:

- All new students are required to provide documentation of a pre-participation physical examination as well as current immunization records.
- All students entering the ninth grade are required to document a pre-participation physical examination.
- Any student who wishes to participate in a school sanctioned co-curricular athletic program must provide documentation of a pre-participation physical examination on an annual basis.
- All 7th and all new 8th grade students are administered an ImPACT baseline concussion test.

- All US school athletes participating in higher risk sports (soccer, lacrosse, basketball, baseball, ultimate) are all given an ImPACT baseline concussion test at a minimum of every two years.
- If a student athlete does suffer a concussion, he/she must be evaluated and cleared by a health care professional trained in the management of concussions before being allowed to return to play. The return-to-play policy does not allow the student to re-engage in athletics programs until the student has achieved a score on the ImPACT test that is within the margin of error or above their baseline score. Additionally, the student needs to be completely symptom-free during daily living activities. Once this threshold is reached, a gradual increase in activity is performed; the student will not progress to the next level unless they are symptom-free at the current level.
- To address classroom issues that result from concussions, the school's learning specialist becomes the student advocate and works with the student's teachers and health care professionals in setting appropriate levels of work while the student is recovering from their concussion.
- Students with special medical conditions (diabetes, epilepsy, etc.) will have a Medical 504 Plan which establishes procedures and accommodations that will address medical concerns and enable the student to safely continue participating at Overlake.

In regard to student illness, the following safety practices and procedures are in place:

- Our current process of monitoring student illness begins with front line faculty and staff who have students in their classroom or school-sponsored activity.
- During the traditional school day, if a teacher determines that student illness is a minor issue, the student may be sent to front office to rest in the "Health Room" and a parent may be contacted for pickup.
- Should the illness be determined to be of a greater concern but is a non-emergency, either the Athletic Trainer or the Outdoor Director will be contacted to assist student. If the illness is considered an emergency, emergency procedures will be followed.
- In the event of widespread public communicable illness or disease, the school will follow guidelines that are published or communicated to the school by local or federal health department.

What provisions are made for the health and accident/illness response during school sponsored events off campus?

The following provisions are made for health, accident, and illness response during school-sponsored off-campus events:

- All employees are CPR and First Aid certified.
- In the Emergency Handbook, a Critical Incident Checklist assists the school and the administration in planning and reacting to an accident/illness while students are off-campus.
- All Outdoor Program Instructors are Wilderness First Aid and/or Wilderness First Responder certified.
- Student Medical forms are taken on each off-campus trip. These forms list any medical conditions, allergies, and emergency contacts.

- The Outdoor Program requires all students to fill out a Trip Permission form before each trip which asks for updated medical conditions, allergies, and emergency contacts. The parents of any student with special medical needs is contacted by the Director of the Outdoor Education to discuss the student's needs and medications before the trip.
- The Outdoor Program sends out a Trip Information Form to the Administration listing the dates of the trip, the list of students traveling, the itinerary, and the emergency contacts. An administrator is on duty while the trip is away from campus. A satellite phone is taken on all trips where there is likely to be poor cell service.
- Each faculty or staff member offering a Project Week experience must fill out an Emergency Response Plan for their specific trip which includes nearest hospitals, sheriffs, and a plan of what they will do if someone is injured or sick during their trip. Students must also fill out a Project Week Permission Form which asks for updated medical conditions, allergies, and emergency contacts. On all trips, students are given the contact information of the leaders and any emergency contacts in case they are separated from the group. During Project Week, there is a 24 hour emergency contact for all projects. This emergency contact also has all the itineraries, lists of students, and contact information to assist in the response to an injury or illness.
- All sport coaches are trained in CPR and First Aid. Many of the home games also have an Athletic Trainer on-site to help with any injuries.
- All coaches are provided packets with emergency information forms for all students as well as other coaches in their specific program. These packets include head injury procedures, lightning procedures (for outdoor sports), emergency action plans for home venues, and directions to five surrounding hospitals around home venues.
- Coaches are also required to complete a game report and, if needed, an Injury Incident Report following each game. Part of the game report deals with safety considerations of transportation and facilities.

The school has written emergency and crisis procedures and is prepared to implement them.

How does the school plan for potential emergency situations, and how are these emergency management procedures evaluated and reviewed?

The Risk Management Committee meets quarterly and additionally as needed to discuss existing, future, and potential issues. The committee also reviews, evaluates, and recommends improvements to drills, procedures, policies, and practices, which are then codified by administrators. The administration oversees the Risk Management Committee, and several administrators sit on the committee, ensuring that the school plan for potential emergency situations is appropriately evaluated and reviewed. The Emergency Handbook is updated annually (overseen by the Risk Management Committee). The handbook and exit plans are posted in all classrooms and offices and are available online. Emergency procedures are also printed in the annual school directory. The Emergency Handbook contains a critical incident checklist that provides guidelines for emergency situations and the aftermath of these events. Section 1, a-d outlines more details of our emergency procedures. Please refer to the Overlake Emergency Handbook in the appendix for detailed information.

How are the purchase, storage and rotation of emergency supply inventories managed?

The following procedures are in place to monitor and manage emergency supply inventories in various categories:

Storage

- Water containers, rations, and emergency supplies are stored in an emergency vehicle located on site.
- Emergency backpacks are located in the emergency vehicle.
- Handheld two-way radios are located throughout campus with designated staff and faculty. Additional two-way radios are also located in the front office, technology department, maintenance, and the outdoor education office. The two-way radios are specifically positioned so they are always within reach.

Purchasing

- Items are purchased as stock expires from local and reputable vendors.

Rotation

- Perishable items are rotated and replaced according to their expiration date.
- Standard building first aid kits are managed by an outside vendor.
- Other miscellaneous medical supplies are managed in-house by the Athletic Trainer and other designated staff.
- Major safety devices are tested and rotated as components expire.

What are the school's overall strengths in regard to the area of health and safety?

The following areas have been determined as strengths in regard to the area of health and safety at Overlake.

- The auto-door locking system is in place; automated school lock down system is functioning.
- We have an active Risk Management Team.
- AEDs are on campus in each building and training for AEDs has been implemented.
- The paging system via phones with a 3-tiered system for 911 has been implemented. Overlake has an improved emergency communication system.
- We have staff on-site with advanced medical/emergency training.
- All staff and faculty are expected to be current in CPR and first aid. If their certification expires, on-site training is provided to them at no cost to the individual.
- All safety procedure manuals reflect best practices.
- This year, updating medical emergency information annually for all faculty and staff became a requirement.
- Emergency response plans have proven to be effective—Overlake performed well on all recent emergency drills.
- Overlake provides many opportunities for continued education and professional development in health and safety.
- Overlake has highly educated students in terms of CPR and first aid.

- Many of our procedures are proactive in nature and try to identify problem areas before an issue arises as opposed to reactive.
- Any time a group leaves campus, a first aid kit accompanies the group (i.e. Project Week, field trips, etc.).

What areas of growth and/or recommendations does the school need to make with regard to the area of health and safety?

The following areas have been identified as areas of growth in regard to Overlake's health and safety:

- Increasing lighting in all parking areas.
- Increased supervision of students who aren't picked up by closing time. Currently students remaining at the end of the school day are directed to the Gym or Fulton where adults are present. This system could be more closely overseen.
- Procedures for monthly inspections of the facilities, equipment and grounds need to be compiled, updated, and reviewed (possibly by implementing a preventative maintenance schedule through web-based software).
- Sheltered Place drill procedures need to be written and implemented for in case of a chemical spill, volcanic eruption, etc.
- A master campus map should be created for quick location of emergency supplies.
- Security for front office building (i.e. the ability to lock down the office) should be addressed.
- Science lab safety policies and procedures should be improved for lab-related emergencies such as chemical spills, chemical fires, etc.
- An after-hours/off-campus disaster plan should be developed.
- Signage on common outside areas should be increased. Signage should be streamlined so building identifiers are similar in appearance and location so they are easy to recognize.

Documents Provided:

- Safety policies and/or procedures
- Health policies and/or procedures
- Emergency response and crisis procedures
- Copy of any external safety review of the school's outdoor/wilderness program, if applicable