**NWAIS self-study process:** The school has conducted a self-study that provides for reflection and for broad participation of the school community in a way that illustrates the school’s commitment to continual school improvement.

Who was responsible for this section of the report? Nancy Linscott
Other participants: Chris McAvoy, Kristen Barr, and Harry Weekes.
Parent Editor: Heidi Mickelson
Round 2 Review: Emma Drucker, Nathan Kolar, Mike Curran, and Eric Levenson.

**Question 1:** 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.

a. 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.

The Sage School worked to gain diverse perspectives to support the self-study process by completing the following tasks.

• In the 2014-2015 school year:
  o Chris McAvoy was identified as the Self Study Coordinator.
  o Chris leads board, faculty, and parent meetings for the year describing the two-year process the school has laid out to accomplish the task.
  o The school’s board, parents, students and faculty focused on re-crafting the school’s mission statement and developing band level scope and sequence.
  o The board reviewed policies to prepare for the self-study.
  o The faculty reviewed our curriculum guide.
  o Three staff members, Chris McAvoy, Nancy Linscott, and Nathan Twichell, divided aspects of self study coordination and attended the NWAIS Self Study Conference. Chris designed the overall schedule for the self study and took on the role of ‘task master’. Nathan focused on coordinating the Google Docs and taking charge of formatting decisions. Nancy took on the responsibility of ‘care and feeding’ of the visiting team, while also creating a physical clearinghouse for the documents in the office.

• In the 2015-16 school year:
  o Two coordinators, Nancy Linscott and Nathan Twichell, revisited the NWAIS Self Study Conference.
  o The faculty started the school year by revisited the newly adopted mission statement and affirmed our commitment to the changes made the prior year.
  o The first Sage Parent Association (SPA) meeting of the year reviewed the Program Mission question of the self-study.
  o In the fall of 2015, the school surveyed parents, students, faculty, and alumni on a wide range of self-study topics.
  o A review of our Field Studies program was completed.
  o Chris McAvoy created a timeline and calendar to assign staff to questions, which included the following
    o We dedicated the first Monday of every month to parent meetings in which we invited parents participate in writing and reviewing our self-
study responses. We reviewed every question of the self study through this process.

- According to our parent survey 93% felt informed about our self-study meetings, 83% felt they understood the importance of the self-study, and 86% felt their voices would be well received in those meetings.
- While 49% of the parents surveyed planned on coming to our Monday self-study meetings, the attendance rate was lower. We probably had around a quarter of responding parents participate, and a few Mondays we had only several parents attend.
  - The faculty dedicated twenty, 45-minute faculty meetings to collaboratively discuss, reflect, and respond to the self study questions.
    - Groups consisting of the topic leader and two to four faculty met most weeks after our weekly all-faculty meetings to collaboratively address the question and prepare a response.
    - Relevant survey questions and responses were handed out to Lead Authors of each question to include in their answers.
  - The structure of the year is included in the table below.

<table>
<thead>
<tr>
<th>Draft Due Date</th>
<th>Question</th>
<th>Lead Author</th>
<th>Faculty Meetings</th>
<th>Parent Meetings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oct 16 (conferences)</td>
<td>Program</td>
<td>Chris and Harry</td>
<td>Aug 25, Sep 1, 2 Sep 24, Oct 1, 8</td>
<td>Oct 5 + SPA meeting</td>
</tr>
<tr>
<td>Dec 18 (winter break)</td>
<td>Mission</td>
<td>Chris</td>
<td>Nov 5, 13</td>
<td>Nov 2</td>
</tr>
<tr>
<td></td>
<td>Culture</td>
<td>Emma</td>
<td>Dec 3, 10</td>
<td>Dec 7</td>
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<tr>
<td></td>
<td>Diversity</td>
<td>Sara</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Health &amp; Safety</td>
<td>Nate T</td>
<td></td>
<td></td>
</tr>
<tr>
<td>March 7</td>
<td>Admission</td>
<td>Chris</td>
<td>Jan 7, 21</td>
<td>Jan 4</td>
</tr>
<tr>
<td></td>
<td>Institutional Leadership</td>
<td>Harry</td>
<td>Feb 4</td>
<td>Feb 1</td>
</tr>
<tr>
<td></td>
<td>Plant</td>
<td>Nancy</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Admin</td>
<td>Nate T</td>
<td></td>
<td></td>
</tr>
<tr>
<td>May 15</td>
<td>Institutional Advancement</td>
<td>Nate K</td>
<td>March 3, 10 April 7, 21</td>
<td>March 8 April 4</td>
</tr>
<tr>
<td></td>
<td>Finance</td>
<td>Harry</td>
<td>April 4, 21 May 5</td>
<td>May 2</td>
</tr>
<tr>
<td></td>
<td>Process</td>
<td>Nancy</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>HR</td>
<td>Nate T</td>
<td></td>
<td></td>
</tr>
<tr>
<td>June 17</td>
<td>Cross group read, edit</td>
<td></td>
<td>Jun 14, 15</td>
<td></td>
</tr>
</tbody>
</table>

- As a semi-final read through, each question was then assigned to a parent volunteer to read and edit. Those parents are listed on each question as part of the process.
- Over the summer of 2016, one staff member, Emma Drucker, edited and formatted the entire document.

- In the 2016-17 school year:
Our original timeline was set up for a fall visitation, but due to scheduling limitations, we were placed on a January visitation. The ‘extra time’ along with a need to familiarize a number of new staff members to the self study, made us create a structure for the fall of 2016.

Staff meetings were dedicated to another review process, intended to re-read several of the documents for accuracy, updating, and looking for any missed items or concerns. We didn’t make it through every section of the self study, but did review most of them, and the board did another review of their sections. The new staff frequently commented about how helpful that process was in their learning about the school.

Parents were re-oriented to the process at Parent Association meetings.

b. Describe how the board participated in the school’s self-study process.
Several board members are also parents and joined our once a month self-study sessions with parents. More directly, the board took the Institutional Leadership and Finance questions and divided them up among its members. In the first round, individual members and small teams from the board addressed specific questions. Next, we distributed the answered questions to other board members for review, additions, and edits. Then, members of the board who had not yet seen the responses gave the questions another review. Ultimately, in the fall of 2016, the board members, like the faculty, redistributed the answers to their questions among themselves and did another, and final, draft.

While the number of ‘outsiders’ writing and reviewing the board questions was lighter than other sections, the board found it to be a unifying and important experience for them to work together on this task. As a new school, it clarified board responsibilities and duties, and helped point them in a more productive direction. In the next round of accreditation, we will be in a position to get more voices in these sections.

Beyond answering those questions, the board has been actively involved in formalizing board procedures, responding to survey data, and generally making the board’s operations more thorough, formal, and defined. The board has been actively creating policies the school did not have (e.g. Diversity and Cash Management), responding to input from parents, creating an appropriate successional structure, and developing board policies and procedures in order to function more effectively and efficiently. The board looked at various elements of the self-study as an action plan and took serious steps to improve how it operates.

Question 2: 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.

a. What general topics were selected in the surveys and why?
From the opening of the school in 2009 to the current year, the school has conducted a variety of surveys (available in the Google Drive file). The primary purpose of the most recent parent survey conducted during the 2015-16 school year was to compare results with an earlier parent satisfaction survey conducted in 2013-14; the school asked some of the same questions in both surveys. However, a second purpose was to get the most specific and concrete feedback to help the school address the questions of the self-study.
Therefore, the 2015-16 parent, student, faculty, alumni, and board surveys aligned with each other and aligned with major questions and themes of the self-study. We asked our adult constituents specific questions in the surveys about program, diversity, governance and finance, institutional advancement, admissions management, school plant, and health & safety, and the self-study process. We asked the students about the school’s mission, culture, and the program components.

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

Parents have been the primary target constituent group. Initial surveys assessed how our parents association was functioning to inform improvements to its structure and purpose. We sent out overall satisfaction surveys to our parent body to collect feedback on school-wide programs in 2013-2014 and 2014-2015. We used these surveys to assess our performance and establish a plan for improvement or for changes as indicated.

The school conducted five surveys during the 2015-2016 school year to gain more detailed data relevant to the self-study. The constituent base expanded to include current students, board members, faculty, alumni, and parents.

**c. 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.**

**Alumni Survey Results**

At the time of the survey, twenty-one students had graduated from The Sage School since 2009. We contacted all graduates and received responses from 11 individuals. Initial survey questions querying alumni about where they have gone since graduating were followed by focused questions regarding their Sage School experience; their perceptions of the school’s success in preparing them for college; whether the school’s programs and philosophy align with the mission; and their opinions regarding school culture, quality of programs, diversity, and admissions. The survey asked alumni about school choices and solicited a narrative on what they felt were the strengths and weaknesses of the school. Answer choices ranged from “needs drastic improvement” to “doing very well” and each of the categories was assigned a numeric value as shown below:

-2 = “Needs Drastic Improvement”
-1 = “Needs Improvement”
0 = “Neutral”
1 = “Doing Well”
2 = “Doing Very Well”

Answers with an average of 1 or above show that respondents generally agree that the school is “doing well” or “very well.” Answers with a negative average indicate a significant need for improvement.

Generally, respondents indicated that they agreed or strongly agreed that The Sage School provided certain skills necessary for success in college such as writing, time management and organization, problem solving, and people skills. Alumni indicated less confidence in college math readiness; with two former students indicating that they disagree with the statement, “I was prepared for college level math,” and four more indicating a neutral opinion on the efficacy of the math program in preparing them for
college. However, none of the survey questions received a negative average, indicating that there were very few respondents feeling a strong need for improvement in any area surveyed. Most of the averages were between 1 and 2 with only a few coming in between 0 and 1. This largely indicates general approval of The Sage School’s approach to programs, culture and adherence to our mission statement.

In response to the survey results and to better prepare students for college math, the school has made adjustments to the math program’s scope and sequence. These changes include diversifying the Math curriculum to incorporate projects and redistributing the course curricula to even the length of our courses. These changes aim to ignite students’ motivation, give them a broader perspective on math applications and set more attainable goals for each academic year. Another change we have created, as an example, is the inclusion of a weekly “Math Superblock” period where students are assembled in similar ability-based groupings and undergo a trimester-long ‘real world’ project to understand the connections between their Math content and ways to apply it.

**Student Survey Results**

In Fall 2015, 79 out of 86 students responded to a survey designed to gain insight into their perceptions of the culture, programming, safety, diversity, and admissions process of the school. Similar to the alumni survey, most respondents generally agreed that the school was “doing well” or “very well” in all areas queried with average responses overwhelmingly ranging between 1 and 2. While all questions pertaining to the school’s culture received responses averaging above 0 (indicating a neutral position), the weakest levels of satisfaction occurred when students were queried about whether rules were fair, equally applied and enforced, and student behavior, including the sense of being fully supported by other students. In these areas, most students who felt that the school was not doing well or very well reported a neutral response as opposed to responses indicating “needs improvement” or “needs drastic improvement;” only about 10% felt these areas needed improvement. Students indicated favorable opinions of the school’s adherence to the stated mission; however, the question of whether students felt challenged showed an anomalously low average response closer to neutral – possibly due to trouble interpreting the question, which was “I don’t feel so challenged that it is crushing.” Some comments in response to this question and the program question hint that some students find the workload challenging.

Under the program question, students’ responses were similar to those in the alumni survey, where most responses were in the “doing well” or “very well” categories. The math program, however, showed the lowest average as approximately 13% indicated improvement on some level was needed and nearly 20% were neutral. The Spanish program received a similar overall average, although fewer individuals were neutral and about 15% indicated some level of improvement was needed. The comments suggested that opinions of the program were dependent more on their perception of specific teachers’ style rather than the program curriculum. While 15% is not an overwhelmingly large percentage of students voicing concern about the Spanish program, the school has taken steps to investigate the reasons this opinion exists. The Head of School met with the teachers from the Spanish department on a weekly basis to check in on the challenges within the classroom and to provide mentorship, support, and encouragement. Spanish
teachers also conducted assessment techniques with students, such as the Oral Proficiency Interview, to determine how well they were assimilating their foreign language skills and to measure growth over the course of the year.

The remaining questions, pertaining to diversity and inclusion, admissions and enrollment, and other questions requiring narrative comments indicate that students view the school as doing well or very well. In the comments, the most common theme of concern was the functionality of the Wi-Fi, which indeed has been periodically problematic throughout the past two years. Our office manager has spearheaded the effort of finding solutions to this problem, and as of October of the 2016-10 year, there have been few interruptions to our service.

Faculty Survey
Eleven of our 13 faculty members responded to the 2015 survey which covered the school’s mission statement, culture, programs, diversity, governance and finance, institutional advancement, admissions and enrollment, school plant and health and safety, and human resources. The responses were all indicative of support for execution and relevance of the mission and programs. In these two areas, responses were almost universally in the “doing well” to “very well” range. One staff member indicated a need for improvement and two were neutral on the topic of Friday afternoon Creativity Workshop and we are giving the program further consideration. One employee responded that the use of quantitative data to improve programs needed improvement.

On the topic of diversity, a negative average was noted in response to the query, “The Sage School’s community reflects many perspectives and diverse backgrounds.” On this specific topic, four individuals indicated improvement was needed and four indicated a “0” or neutral position. Low but positive average ratings (0.18) in another query indicate that staff may feel that more could be done to increase the range of perspectives and backgrounds at school and through the hiring of new staff. The self-study process has also provided the opportunity to reflect on the various manifestations of diversity present or absent from The Sage School and the board is tasked with developing pro-diversity policies.

The faculty survey also indicated that various aspects of governance and finance could be more transparent based on higher percentages of averages falling in the “neutral/don’t know” zero position. This was particularly notable on queries about board size and effectiveness, structure, and functioning and to a lesser extent faculty-wide knowledge of financial status. Even before the faculty survey was distributed, we recognized that the workings of the board were not regularly broadcast. In the years preceding the self-study, the board itself was in its infancy and therefore was focused on setting up the school’s foundation. The Head of School is working to incorporate more information along these lines at our faculty meetings.

With respect to admissions, the only glaring uncertainty involved the workings of financial aid disbursement with 60% of the staff indicating a neutral position on the question that “the financial aid process is clear.” This is an understandable perception and one not likely to change. The school partners with School and Student Services of
NAIS to collect household income and eligibility data and then the results are forwarded to the School Head and Admissions Director, who make final determinations based on family financial profiles and available funds. Teaching staff is generally not involved in that process.

With respect to faculty perceptions of the school plant and health and safety, the deficiencies that the administration and facilities manager recognized, the faculty recognized as well. For instance, the lowest values – though still above neutral – registered in the unsurprising areas of technology and overall facility compatibility with mission and programming. The school has experienced on-going and vexing problems with reliable Wi-Fi (although new equipment has reduced the number of outages). Further, as the Facility Master Plan (available in the Google Drive file) describes, the building was not designed as a school; although many of our daily workings integrate building features and layout, a space intentionally designed as a school would be superior. The faculty is aware of the school’s plans for future development of a permanent, school-owned campus and supports the efforts to relocate.

Board Survey
Eight of our nine board members responded to the 2015 self-study survey which covered the school’s mission statement, culture, programs, diversity, governance and finance, institutional advancement, admissions and enrollment, school plant and health and safety, and human resources. Three of our board members have served for four or more years, one for at least a year, and three are in their first year. More than half of the board members have at least one child at The Sage School.

The board indicated agreement on the school meeting its mission and building an intentional school culture with most responses falling into the “doing very well” or “doing well” categories, and a small number in the “neutral.”

Regarding program, two respondents indicated that the math program “needs improvement” and one noted the Spanish program “needs improvement,” while in all other program areas the school was rated as “doing very well,” “doing well,” and “neutral.” When responding to the school’s effectiveness creating a diverse community, the board generally agreed that the school was “doing very well,” except for the areas of the community and staff reflecting many perspectives and diverse backgrounds. In the areas of governance and finance, the majority of results was positive and reflected the board’s satisfaction with the governance structure and financial operations.

To address diversity, the board has been tasked with creating new policies. The self-study addresses this issue in greater detail in questions 9-11.

Parent Surveys
The 2014 parent survey focused on the events and activities that are either organized by various subcommittees of the Parents’ Association or that the school organizes in an effort to foster relationships among families, develop effective fundraisers, and educate parents on adolescent-related topics. The survey helped the school hone in on things that parents are wholly in support of or willing to assist with, while accounting for time and energy constraints. For instance, volunteer-intensive activities, such as participating in the local
Christmas bazaar (a volunteer-intensive event) were not as highly rated as things such as the annual “Adopt-a-Tomato Plant” fundraiser, which requires no parent involvement. The results generally indicate that overall, respondents are satisfied with the structure of the SPA, the activities available to them for volunteering or socializing with other parents, the level of communications produced by the school, and the informative format of the monthly SPA meetings and SPA subcommittee events like the book club, ski day tailgate party, or the parent mixer.

We developed the 2015 parent survey to focus on criteria essential to the self-study and on parents’ knowledge of the self-study. Questions related solely to the school itself covered the topics of mission, culture, programs, diversity, governance and finance, administration, institutional advancement, admissions, and health and safety. Self-study related questions queried survey takers on their awareness of the process, participation in it, and their understanding of the value of their input.

Fifty-nine parents responded to the survey. The results show that the strongest statements of support, as measured by the highest percentage of people (75%-85%) rating the school as “doing very well,” were related to the following areas:

- The school honors adolescence as a critical developmental window.
- The school has a positive relationship with the community.
- The school welcomes new members to its community.
- My son/daughter has participated in engaging experiences at Sage.
- The school's staff has positive relationships with the students.
- The school is a positive place.
- The school is committed to continual improvement.
- The school has a quality of the Community Service Program.
- The school takes advantage of community resources.

Between 90% and 98% of the respondents selected “doing well” or “doing very well” on 26 questions related to the specific self-study parameters. The areas showing the greatest support as measured by these averages were related to the admissions process, the quality of the school community, programming, quality of instruction, manifesting an engaging environment, daily administration, and quality of their child’s overall experience.

Lower averages in the “doing well” and “doing very well” categories resulted when more respondents indicated a “neutral/don’t know” answer to specific questions. This occurred mostly in the areas of diversity, long-term planning, board and administrative structure, and finances. For example, in most of these categories, the responses indicated that a third or more of the respondents were either neutral or don’t know about the topic, while the remainder of respondents indicated “doing well” or “doing very well.”

Only nine (0.1%) out of 5,000 possible responses (or 0.1%) indicated that something about the school “needs drastic improvement.”

Two of the predominant areas where greater numbers of respondents indicated a “neutral/don’t know” answer were governance and finance. To address this concern, the school has implemented an open meeting policy for board meetings and includes dates,
times, and locations of the meetings in each of its weekly parent newsletters. Further, board members now attend the monthly SPA meetings to report on specific activities that they are working on related to long-term planning, policy-making, financial status, and other board activities.

Preliminary Visit
In February 2016, NWAIS sent Matt Culverson from the McGillis School and Patricia Hearn from Lake Washington Girls Middle School to The Sage School to conduct the preliminary visit to assess overall readiness for the final visit by the full accrediting team, scheduled for January 2017. The preliminary team indicated that the school is indeed ready for the final visit.

Question 3: The school has addressed all major recommendations from its previous accreditation visit (only for schools going through re-accreditation).

a. 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?

As this is our first self study, this question doesn’t apply.

• What were the school’s overall strengths in conducting the self-study process?
The self-study process involved all members of the school community over a two and a half year process at the school. Completing the self-study began with ongoing conversations, evolved into collaborative brainstorming and bullet-pointed responses to questions, and continued with the writing, editing, and reviewing of responses. The process was meaningfully reflective and encouraged communication and collaboration that allowed for different members of the school community to speak about many aspects of The Sage School. The Monday afternoon meetings with faculty and parents, while not overwhelming in their attendance, were seen by all participants as worthwhile discussions to make the school a better place. The timeline and break down of responsibilities in creating the self-study prevented the task from becoming too cumbersome or overly burdensome on any individual or group of individuals.

The surveys also represented a great strength in the process. It was powerfully helpful for us to gather as much information from as many sources as we did. It clarified our views of our processes and ourselves. By orienting the survey questions around the self study questions, we were able to gather data that directly helped us understand various views.

The results from the surveys were very encouraging to staff, parents, and board members. The process itself has been a strength from the school’s perspective. It has strengthened our views, clarified our stances, and encouraged us to ask ourselves important questions.

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

One of the great challenges of a small school was to complete the task with only a small handful of staff. Designing and maintaining a schedule to keep us all on track took constant and steady effort. Though we devoted time during faculty meeting to write and respond to
the self-study, the precious before school minutes were sometimes consumed by more immediate tasks (flagging down a parent, making copies, helping students carry in large projects), which distracted from the self-study. While these are not clear recommendations, they are a bit of a reminder or warning as we go through the process again. We solved the issues in one particular way, but for our next self-study, it would be wise for us to focus on other small schools and how they have structured themselves for the process.

One other weakness, which is difficult to do anything about, was a lack of meaningful data from alumni. This will be corrected simply by the amount of time we have between self-studies. We need to better understand how our alumni are doing, what they are doing, and how Sage has affected that journey.

**Documents Provided:** (available in the Google Drive files)
- Visiting Team Report from the last evaluation and any Response Report if applicable (N/A)
- Copies of the school’s NWAIS Annual Reports for the past five years (for Team Chair and Vice Chair prior to Preliminary visit)
- Copy of summary data gained from the constituent surveys
School Mission: The school’s mission is understood and supported by all constituencies.

Who was responsible for this section of the report? Chris McAvoy
Faculty: Chris McAvoy, Maria Maguire, Harry Weekes
Parent Editor: Julie Cord
Round 2 Review: Maggie Blatz, Sara Berman, Matt Leidecker, Amy Morrison

Question 4: The school and its Board have reviewed its mission as the starting point in the self-study process.

a. Describe the way in which the mission statement was used as the starting point for the self study.

The school took the year prior to our self study year to prepare. We began by examining our mission and used that examination as the point of departure for building our school and the self study over the past two years. During faculty meetings in the fall of 2014, we began to review and revise the mission. The Assistant Head of School led the investigation of all aspects of the mission and how they related to the implementation of the overall school program. Faculty thoroughly reviewed and discussed each word to ensure its appropriateness and relevance to the school’s function. The rest of that year, faculty reviewed our scope and sequence charts for each discipline; the months we spent immersed in our mission guided that review. This process allowed the school community to dive into the self-study using the mission statement as a guide for evaluating every aspect of school life.

The first step during our self-study year (2015-2016) was to look at how the overall school structure and schedule reflects the mission. After reviewing our new mission, we used our start-of-year faculty meetings to discuss program questions 12 (which is about mission), 14 (which is about our educational program’s underlying beliefs and assumptions), 16 (which is about our school’s assessments), and 19 (which is about excellence in teaching in relation to our mission).

We carried those discussions into the first parent meeting of the year and broke parents into groups to review those questions. We also had the first parent self-study meeting of the year address the same questions. The idea was to choose questions that asked faculty and parents to review our underlying beliefs and overt actions and assess how they related to the new mission.

We continued to lead the self-study by looking at the rest of the program questions with the mission constantly in mind. We pasted the mission at the top of each program question to frame our responses. We examined the mission’s influence on the school’s authentic curriculum, reflecting on how teachers foster academic and social/emotional student growth by encouraging students to develop greater self awareness. We also examined how the school fosters a sense of place through the Field Studies program, the physical design of the school, and the focus on Idaho and our community throughout the Human Ecology curriculum. We then assessed how the mission is reflected in teaching
practices that create learning opportunities specific to the critical developmental window of adolescence.

It was only after we reviewed the mission and the program, through the lens of the mission, that we then looked at any other questions in the self study.

**Question 5:** The school has a clear mission that is effectively communicated.

*a. What is the school’s mission?*

The school’s mission is as follows:

We honor adolescence as a critical developmental window for learning essential academic, cognitive, social, and emotional skills.

The Sage School creates a thriving environment for students through a challenging, authentic curriculum centered on human ecology and engaging experiences designed specifically to promote self-awareness, community responsibility, and a sense of place.

*i. When was it last formulated? By whom? Through what process?*

In 2014-2015, we looked at our mission as the first step in beginning our multi-year self-study process. We spent the first six months reviewing the mission. In faculty meetings, we began reviewing the old mission and considering whether it was worded appropriately. We brought the discussion to the board and they reviewed and discussed it.

We presented a set of mission statement options to the parents after these meetings and had an open discussion about these options and their wording. We had a similar discussion with our 10th-12th graders during which faculty presented options and coordinated feedback. A clear preference emerged from the list of options discussed with board, parents, and students. The faculty, led by the Head and Assistant Head of School, then revisited all the feedback and clarified the language.

The board approved the clarified mission on January 23, 2015 and presented it back to the faculty, parents, and students.

**ii. If changes were made, what were they and what brought about these changes?**

Our first mission was as follows: To create an intensive, experiential learning environment for adolescents that is dedicated to educational excellence and the development of self-awareness through community action, and humanitarian and ecological responsibility.

General feedback from this mission was that it was a bit wordy, heady, and indirectly stated. The ideas in it were generally liked, but needed some clarifying. We created this mission on a napkin at one of the first board meetings of the school, so it was time for a review.
We started the discussion with the faculty trying to clarify our guiding language. We generated lists of keywords, wrote missions individually, and spent several faculty meetings revising them into lists of more precise options. We then involved the board in the brainstorming, and incorporated their feedback.

When we presented a list of options to the parents, certain attempts we had come up with sounded too “summer campy.” The parents eventually agreed upon the current version as their most preferred. They didn’t like the connotations of certain words in other drafts. Parents liked that our new mission focuses on students, defines adolescence, contains the phrase “honoring adolescence,” and especially agreed that the school centers on the last three topics of self awareness, community responsibility, and sense of place.

In our presentation to the students, certain words such as engaging, thoughtful, and phrases such as “fostering a sense of self, community, and place” captured what they felt like the school was about. They struggled with words such as playful, rigorous, and vibrant, which were present in other attempts.

There was much discussion, from the faculty to the board to the parents, about searching for a different term for adolescence. Adolescence seemed a bit clinical and impersonal. When we considered other terms such as young adults or teenagers, it made us feel unclear or non-academic. There was also the danger of appearing like we were a school for teens with special needs. Eventually, all parties reconciled themselves with adolescence.

The phrase “human ecology” was intentionally added to be more precise. We used to call our main class “project time,” and we realized that the students didn’t realize that we were attempting to study humans and our relationships to each other and the earth. By calling this period of time what we study (human ecology), instead of how we studied it (through projects), we felt we were being clearer, and all parties agreed.

We worked to clarify language about our “three things:” self, community and place. We decided that self awareness, community responsibility, and a sense of place were the most accurate descriptors of our daily tasks. Self-awareness seemed to be a skill we could develop (rather than a sense of self, which seemed a bit fuzzy). We wanted to build community responsibility, not merely create a sense of internal school community, so we clarified that piece. Humanitarian and ecological responsibility sounded too heady and removed from the adolescent experience, and community responsibility and a sense of place seemed to cover the right range of issues.

**b. Are there parts of the mission statement about which there is a lack of consensus on meaning or interpretation? If so, please explain.**

There is consensus around the language and meaning of our mission. However, there still are several terms that may need more unpacking. We have, therefore, explained them in an addendum to the mission, which includes definitions for adolescence/developmental
window, academic skills, cognitive skills, social and emotional skills, authentic curriculum, human ecology, self-awareness, community responsibility, and sense of place. We defined and expanded upon each term to build consensus and understanding. That ‘mission expansion’ is now found readily available on our website.

c. In what ways does the school communicate its mission statement?
The mission is on our website, is posted in the school, is in the Family Handbook, is the basis of questions that both parents and students respond to during the application process, and is now shared on the bottom of emails from school staff. Before graduating our school, students complete an Independent Trimester during which they have to create a proposal where they connect their topic of study to our mission. Our mission, and the key terms within it, forms the foundation of our schedule – from daily Human Ecology, to weekly Community Action to Guided Self-Assessments.

d. To the extent that any division of the school has an individual philosophy or goals, that division will provide a written statement of its individual philosophy and its relation to the school’s mission.
We don’t have divisions with different philosophies.

- What were the school’s overall strengths regarding its mission?
The process involved in reconstructing the mission was a challenging and rewarding exercise that involved questioning the existing language and redefining goals and objectives. The collegial atmosphere at our school lent itself well to taking on the monumental task of re-writing our mission statement. We are already accustomed to a culture of constant feedback and this helped facilitate discussions amongst the Sage faculty and staff surrounding the effectiveness of the school’s mission. This culture has impacted our ability to keep the mission of our school central to the development and delivery of our curriculum and the overall structure of the school.

Another strength was the general integration of community in the process, which led to creating a mission statement that truly reflects the values of our entire community. The survey data reflects the overall agreement of all community constituencies regarding the relevance, strength and intentionality of our mission.

- What areas of growth and/or recommendations would the school make regarding its mission?
Internally, one recommendation we have is to keep this process going forward, even in non-self study years. It has been important and rewarding, and it has helped us improve. One significant challenge for us is to be able to communicate to the larger, external community how we live our mission. We live in a small, progressive valley whose educational choices are impressive, and whose language about their school’s offerings begins to sound quite similar. The following two missions are given as an example:

- The Blaine County School District has a new strategic plan: To inspire, engage, educate and empower every student. They commit all students to the following goals: they will be inspired to develop intellectual curiosity through meaningful opportunities; will be engaged actively in our learning community through relevant and real-life experiences;
will be empowered to make independent positive choices through continual social and emotional development.

The Community School’s mission is "From our campus to the wilderness, Community School's mission is to inspire students to think critically, engage confidently, embrace challenges, and lead impactful, purposeful lives." And, they commit students to the following values: Mastery of useful knowledge and essential skills; ability to think critically, solve problems, and make ethical decisions; self-confidence, a sense of self, and ownership of one’s learning; a firm moral code, kindness toward others, and the motivation to serve; a love of the outdoors and a commitment to environmental stewardship; an inclination and ability to lead and the desire to make a difference; and the courage and perseverance to follow one’s passions.

If one were to compare our language to the language of the above two institutions and The Sage School, one might think that each school is very similar. The realities of the three institutions, however, are distinct. Our challenge, then, is to breathe life into our words and to make it clear that we live our mission. For incoming parents, sorting the language out between the three schools can be tricky and confusing. We believe our new mission better matches us to our daily practice. We need to be better able to discuss what makes us distinct.
School Culture: The school has an intentional culture, which supports the school’s mission and NWAIS’ core value of free and open Inquiry.

Who was responsible for this section of the report? Emma Drucker
Other participants: Mike Curran, Erin Howland, Harry Weekes
Parents: Steve Thompson, Penfield Stroh, Shanti LaRue, Chris Root
Parent Editor: Chris Root
Round 2 Review: Pat Owen, Chris McAvoy, Maria Maguire, Kristen Barr

Question 6: There is an intentional school culture.

a. Describe the school’s culture. Consider the following topics, as appropriate, when crafting your school’s description.

In general, when we think of The Sage School culture, one of the first words that comes to mind is intentional. From the curricular philosophy to the structure of the day, week, and year, the school has grounded its culture in our mission and overall worldview.

Our culture respectfully encourages curiosity, joy, and rigor during the fertile neurological stage of adolescence. It is a playful and happy place where students do meaningful work, and engage in real relationships. Our structure is meant to engage our students at each stage of adolescence, encouraging them to open their eyes to diverse viewpoints as they are developmentally ready. Surveying our current constituents on whether the school creates an environment that fosters respectful exchange of diverse viewpoints yielded a very clear statement in support of the school culture.

Several of the questions below contain graphs from surveys. The graph typically comes at the end of each section.

Do not be limited by this listing:

i. Nature of adult interactions/relationships.

Teacher to Teacher:
The nature of teacher to teacher interactions blends the line between professionalism and friendship. There is a strong team mentality, and the teachers support one another in various pursuits. Silliness and humor happens often between colleagues, but there is an expectation of hard work and focus from all members of the team. Teachers expect each other to be engaged in the community and will often spend time together outside of school/work hours.

Teacher to Parent/Parent to Teacher:
Teachers and parents communicate regularly. There are three conferences throughout the year during which parents and teachers discuss student academic, cognitive, social and emotional growth. Students are present at the fall and spring conferences, but the mid-year winter conference provides an opportunity for just the adults to meet, which sometimes allows parents and teachers to approach different topics. In addition to e-mails between teacher teams and parents, and individual teachers and parents, The Sage School sends out a weekly Monday email with both logistical and philosophical information. The Trident, a monthly email newsletter sent to parents and other friends of Sage, details the curricular happenings of the month.
The Sage Parents’ Association (SPA) has a Book Club, which discusses timely topics (e.g. the impact of technology, assessment and motivation, the importance of environmental education). Some of the teachers at The Sage School are both faculty members and Sage parents.

Parent to Parent:
We recognize the importance of a supportive and cohesive parent community and seek to provide events and opportunities to engage parents with one another and with the school. The SPA has a “Pulse of the Parents” committee that meets to discuss how the parents are doing, or what topics are on the minds of our parent body. These have ranged from addiction and suicide, to social media and bullying, to mindfulness and the philosophy behind our assessment system. There is the SPA Book Club discussed above. The SPA has a Fundraising arm and a “FUNraising” arm. The latter puts on events like a parents’ cocktail party, the all-school ski day tailgate, and the Annual Broomball Tournament. All parents are invited to SPA meetings. We also have assigned “Band Parents” that attend the “Pulse of the Parents” committee and are in charge of reaching out to new families and developing a sense of how the parents in a specific band are doing. These aspects are in place specifically to help create a community sense amongst our parents.

Administration/Lead Teachers/Teachers:
All of our administrative duties are distributed amongst people who both teach and administer. While the percentage of these duties changes (e.g. The Head of School spends 85% of the time on administration and 15% on teaching, and a Math and Human Ecology teacher may spend 85% of time on teaching and 15% in administration), there is enormous cross-pollination and contact between administration and teaching. Beyond this, there is a culture of “open and available”—where all staff members have access to one another and can share challenges and opportunities.

From the board level, the Head of School is a board member, an administrator, and a teacher, sharing news from the board to the teaching staff and vice versa.

Board to Parent:
Beyond the fact that a portion of our board members are parents of enrolled students, the board presents annually a “State of Sage” report to the SPA in the Spring. Starting in the spring of 2016, the board has presented a brief committee report at each SPA meeting during the year. They are also in process of developing a Board “goings on” page on our website. Additionally, the board operates from an “open and available” platform to encourage parent access.

**ii. Nature of student behavior and student interactions/relationships.**
The Sage School contains adolescents aged 11-18. While students are divided into bands that correspond to their stage of adolescence, students of all ages interact throughout each school day, which makes Sage unique from many other schools.
Within bands, there are deliberate structures that help students to understand the culture around constructive interactions. Each band has several community meetings throughout the week when students have opportunities to speak about issues within the community, their extra curricular activities, current events, and whatever else might be on their minds. On Mondays within bands, students engage in mindfulness with the Flourish Foundation, which helps them to see how their own internal perspectives and reactions to situations might impact the ways in which they interact with each other.

Field Studies are important in developing a deliberate culture around student interactions within bands. For several weeks, students must live and learn together 24 hours a day. They cook for one another. They see how being the last person to pack up his or her tent impacts their waiting classmates. They learn about the geography of their home. These Field Studies allow students to spend a lot of time getting to know the group and learning what sorts of actions are sustainable within a small community.

When students are back on campus, what they have learned about their peers helps them to interact during their academic classes, which require a great deal of discussion, interaction, and collaboration.

During lunch, students of all ages are free to eat with each other and mingle with their teachers. They are not free to use technology, so instead students are encouraged to engage with other people in the school rather than with their devices. This was an important step in creating a culture of community during an era of increasing ‘screen centered’ communications and entertainment.

Wellness allows students to be playful and energetic together. Sometimes, students play within their bands, other times they play with students of their gender identity, and at least once a week, they play with students and teachers throughout the entire school. Younger students are paired with older students in “Wellness Buddies” so that the younger students can learn Wellness game rules and expectations, while the older students take responsibility for mentoring younger ones. Wellness provides an avenue for student interactions and relationships distinct from those in an academic setting, all helping to build a more open, playful, and communicative environment in which we see each other as full human beings.

Teachers carefully observe student behavior and interactions and open discussions with individuals, small groups, band communities, and within the entire school community to discuss student behavior and interactions to ensure that these interactions remain constructive.

iii. Nature of student and adult interactions/relationships.
In looking through photographs of teachers and students at The Sage School, one teacher noted that many of the photographs involve teachers engaging students at eye level, kneeling and bending to meet the student where they are. Teachers strive to be accessible to students, while also being immensely knowledgeable and appropriately
authoritative. Because students and teachers interact in so many different contexts at Sage, teachers are meant to be mentors and exemplars of constructive behavior in many different situations. Wellness, Field Studies, Community Action, lunch, and academic classes all encompass student-teacher interactions. The diversity of interactions teachers have with their students ultimately allow for more meaningful and effective learning. It also demands that teachers bring their authentic selves to each aspect of the day.

iv. **Commitment to continual school improvement**

Our culture around continual school improvement is founded in continual assessments and evaluation of our performance. We meet as an entire faculty once a week, we meet in small faculty division groups once a week, and we meet as band teams once a week and then have extended meetings several times a year. Through each of these avenues, we discuss how we can rework and refine our craft. Regular meetings allow us to be agile and responsive. We allocate and collaborate responsibilities in order to ensure that each faculty member is able to work within areas of curiosity and expertise, which helps the school continually improve. The survey data presented in the graph demonstrates the strength of commitment to continual school improvement with nearly every person in different factions labeling the school as doing “well or very well.”

![School Committed to Continual Improvement](image)

v. **The school’s expectations for student behavior and student performance.**

The Family Handbook clearly articulates expectation for student behavior, which sets a benchmark of respect. Parents and students sign a form indicating they have read the Family Handbook to signal their understanding and agreement of the school’s expectations for student behavior. We have ongoing discussions with parents, teachers, and students about student behavior and the ways in which that behavior
impacts the culture of the school. The graph from the surveys indicates significant support for these expectations, although it is worth noting that, in general, there are more “needs improvement” ratings than in other sections and more noted by teachers. A faculty member stated one potential reason for this as a comment in the survey: “It is difficult to define the quality of staff and student behavior. I think we have clear ‘broad strokes’, but not fine details. I think that is a good thing, but it makes us not score as high on ‘clarity’, and I think makes it harder on new teachers.” This statement, and other comments and discussions about supporting individuals, about honoring kids and their mistakes, do make The Sage School’s expectations a bit less clear than other schools. As an example, we had a situation a few years ago where a set of girls was wearing ‘short shorts’ that the faculty deemed to be too short. Our dress code discusses ideals such as respect, appropriateness, and disruptions to the learning environments. Several boys felt we were being unfair to the girls and showed up in short shorts out of solidarity. What spun out of this was a lengthy discussion about the concepts mentioned in the dress code. We discussed how we could simply define shorts as “3 inches above the knee” or some more clearly defined rule, but we felt that missed the point of working with adolescents, and would change the very culture of the school if we enacted such a rule. By engaging these discussions, students could talk openly about the concepts and we could come to a deeper understanding than we had prior to simply following a rule. One of the students involved as an 8th grader, in fact, spoke about this discussion during his 12th grade graduation speech as one of his key moments of learning at The Sage School.

When it comes to student performance, we set forth clear expectations for each project, recognizing that individual students have different learning processes and capacities. While student products might look very different from each other, we expect each
student to learn certain skills and produce quality work. Regular checkpoints such as Friday Forms and Guided Self-Assessments help students articulate and assess their own performance and get teacher feedback about their performance. Authentic Assessments require students to demonstrate their learning in a way that helps them see the application of their knowledge and work and also encourages them to produce work that they are proud to share with other students, parents, and the community at large. The graph demonstrates a bit more of a lack of consensus, notably among faculty, on the clarity of expectations for student performance. Some students also rated this as “needs improvement.” This is addressed in the last bullet of this question.

![School Has Clear Expectations for Student Performance](image)

### vi. The school’s expectations for faculty and staff behavior.

The school articulates faculty and staff expectations in the Faculty Handbook—from a code of ethics, to a general understanding of the blend and balance of intrinsic and extrinsic motivators to teaching, to a desire for our staff approach their work with playfulness, humor, intelligence, and humility. We outline these ideals in writing and model them in our conversations, relationships, and approach.

Faculty meetings, first year review, faculty support groups by division, and regular discussions throughout the day provide faculty with continual feedback about their behavior.

Team teaching is a large part of the faculty culture here at Sage. Faculty desks are found in clumps, with each band grouped together. This facilitates conversations, both casual and formal, about the students we serve, and makes a clear statement about the expectations about our culture of working together.
vii. The school’s expectations for faculty and staff professional development and performance.

There is no prescribed quota of professional development courses or activities; teachers are expected first and foremost to model curiosity and a love of learning. It is only possible for them to do this if they continue to learn. The school has sent teachers several times to Learning and the Brain conferences; it funds wilderness medicine certifications, avalanche courses, and Sun Valley Center for the Arts lectures. Teachers are encouraged and expected to pursue opportunities that foster passionate professionalism in the realm of education, and a $14,000 annual budget exists to pursue these opportunities.

From more formalized review discussions to daily rudder-tapping, we evaluate performance on a coaching model. Open discourse between teacher and administrators acknowledges the challenges inherent in teaching. Daniel Pink says, that “mastery is an asymptote”—we never actually get there. The culture around teacher performance assumes that each individual is attempting that mastery anyways. While there are evaluative discussions surrounding performance, our general discussions expand knowledge, sharpen skills, and improve capability.

viii. The school’s decision-making processes

Depending on the nature of the decision, decision-making ranges from individual teachers deciding what is best, to the faculty as a whole coming to a consensus, to the Head of School gathering information about a scenario to make a decision based on multiple perspectives. Circumstances, the school’s mission, our policies, and the school handbook drive the decision making process, which also highlights the ways in which decision making is intentional and reflects the school’s culture.

To generalize, routine maintenance and decisions based on one class or in a single circumstance usually rely on fewer people, whereas repeated disciplinary conversations, or more complex interactions involve more perspectives.

Ultimately, we talk. We discuss the circumstance, the history, the people involved, and we respond accordingly, bringing in people with past experience, or the appropriate administrative oversight to determine the best course of action.

ix. The school’s governance

The culture of community and collaboration is present in our governance structure as well. The board is working toward a structure that uses a small central board (no more than 15 members), with reliance on strong committee structure, whose members include people on the board and members of the community with expertise in committee areas (development, finance, etc.). We employ a similar structure with our Strategic Plan, anchoring each priority with board members, and rounding out committees with interested people. We divide and categorize our work by specific tasks and actions, and seek those people most interested and best able to address them.
Our Board of Trustees oversees all these individuals and tasks and works in collaboration to coordinate the strategic functioning of the school.

**x. Use of school’s facilities.**
Throughout the school day, different classrooms serve many different functions. The school’s facilities morph and re-arrange to meet the varied needs of Wellness, math, community meetings and other functions. At the end of the school day, those who use the school facilities (i.e. students and teachers) are responsible for cleaning them.

Few outside groups use the school. For years, we had a wonderful relationship with Higher Ground, whose summer programs cater to students with intellectual disabilities and challenges. Otherwise, various nonprofits have used our space for board meetings. We are open to relationships that align with our mission. These are not advertised, neither are they discouraged.

**xi. Traditions, activities, rites, rituals, and school calendar.**
The pace and flow of a year at Sage is shaped with moments of intensity and rest, all designed to build a culture of quality work mixed with fun, all while centered in immersive experiences. The year is bookended by fall and spring Field Studies and punctuated in the middle with an all-school winter Field Study. There is a mid-trimester conference each trimester that serves as a formal check in point with parents.

Though we are a young school, we have several well-integrated traditions, rites, and rituals throughout our school year. The traditions have been designed to highlight the various cultural values of the school. On the first day of the year, teams of students of all grades perform Community Action together before each band of students departs separately for two weeks of Field Studies. At the end of these two weeks, the school comes together for a collective dinner, campfire, campout, breakfast, and Field Study presentation. This 24-hour gathering introduces new students to the school and allows for a collective hive of energy and sharing after many days of intense experiential learning. Before the beginning of winter break, faculty and students partake in an all school secret snowman gift exchange.

Each Groundhog’s Day sends the school to the mountain and the cross-country trails for our annual Ski Day, the morning of which is spent in multi-age groups, usually dressed up, cruising the slopes, tromping through the snow, and otherwise enjoying our area. The middle of the day is spent in an all-school tailgate in the parking lot of the ski resort. We are adding, in the 2016-17 school year, a second ski day where each band will get to spend an afternoon skiing together in order to build their own internal relations.

Mid-winter, the entire school travels to a winter lodge for a Field Study focused on Winter Ecology. This Field Study puts the entire school in close quarters for several days and is a wonderful ‘break’ that separates two trimesters. It rebuilds our cultural connections to each other in the depths of a long Idaho winter. There is a light and silly winter dance for all students in the school. We close the trip in a big circle during
which each individual in the school articulates what Sage means to them. This winter Field Study creates an important reinvigoration and re-energizing force as we move into the final trimester of the year. The Sage Cup, a broomball tournament, follows the winter field study and is the central event in our day-long winter carnival that also includes awards ceremonies and lunch, all adding to the spirit of togetherness.

At the end of each year when students return from their Field Studies, the school has a very intentional ‘closing’ to our school year. We start the last day of school with ‘closing ceremony’ in which each band takes some time to acknowledge the gifts and attributes that each student has added to our school community and culture. We follow that with our Transition Ceremony, in which we ‘graduate’ students from each band into the following band. A current student in the older band welcomes one student up who is moving into their new band. The welcomer then tells the student what they believe that new member will bring to their new band and offers them the corresponding animal totem. Then, after all of the new bands are formed, we play a game together. This ceremony caps the year and sends students into summer realizing that they are moving into the next stage of adolescence.

xii. Involvement of parents.
We serve our students best when their parents are informed and involved. This happens on multiple levels. From the new Parents’ night at the start of school, to Back to School night for all families, to the School Cocktail Party, to various FUNraising events (ski day and broomball), parents are involved casually throughout the year. Monday emails connect parents to what is going on each week at school, and every 6-8 weeks the Parents’ Association meets and is open to all parents.
We meet formally three times at mid-trimester each year for conferences. The first meeting is a family meeting, guided by faculty. The second is a parent-teacher conference without students present. The final conference is a family meeting, but led by the students.

At the end of each trimester, we mail home student assessments. These assessments speak to the development of each individual student’s academic, cognitive, social, and emotional skill development.

Beyond this, email between individual staff and families, contact during drop off and pick up, and a culture of openness all lend to engaging parents in the lives of their students and in the life of the school.

However, part of honoring adolescence is also about creating the culture of independence, and we look to craft moments of developing the skills of independence. We intentionally do not take parents as chaperones on our Field Studies trips. There are moments where parents are welcomed into the community, and moments where we tell them it is better for their children to face the tasks on their own.

**xiii. The school’s relationship with and involvement in its community.**

The Sage School is deeply rooted in the community of the Wood River Valley. The curriculum itself harnesses the cultural and physical landscape of the valley. Throughout the year, and most intensely during Field Studies, local experts and organizations provide important perspectives and information to our students. Throughout the week, each student performs two hours of Community Action embedded in his or her schedule. As a school, we are contributing approximately 6,000 hours every year to the community. This commitment allows students to better understand a broad variety of nonprofits within our community and provides those nonprofits with valuable aid and partnerships. Over the years, many of these partnerships have grown into wonderful relationships, where each of the nonprofits naturally refers to our students and their work in everything from presentations to the community to annual reports. Our ongoing relationship with The Hunger Coalition is, perhaps, the most powerful example. We glean over 1,000 pounds of food each fall, spearhead an October canned food drive, make over 200 pies for their Thanksgiving Baskets, raise money for them by selling luminarias during Winter Break, and work weekly in their warehouse.

Community Action often requires students to speak with a variety of adults within the community. In addition to our Field Studies and Community Action, students often present or make available their Human Ecology projects to the public. This practice raises the stakes for the students to create quality work and also allows the community to learn from our students and their hard-earned expertise within their area of study. The Sage School also feeds our community through our greenhouse, which provides herbs, tomatoes, and fresh greens to local stores and restaurants.

In the graph about our relationship with the community, we clearly have a strongly united view that our relationships are overwhelmingly positive. Interestingly, the
students rate us the lowest of all of our constituents. We believe this relates to something we address in the final bullets of this question— that our public perception may need to grow to better reflect our actual realities.

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

We are a small school. While this doesn’t immediately lead to understanding of culture, it means that there is broad exposure to cultural elements, there is much overlap between different elements of the school, and there is space for an enormous amount of dialog.

In our parent community, the SPA has developed a Band Parent structure and a Pulse of the Parents committee that reaches out to new families, as well as keeps current families on top of school happenings. The SPA also puts together events including our annual ski day, the Winter Carnival Broomball tournament, and graduation, creating events that maintain our culture.

In our teaching community, every teacher is a member of different teams—a Band Level Team (e.g. the 6/7 Team), a discipline team (e.g. Spanish Teachers), and different administrative teams (e.g. student life). In this way, new and seasoned teachers work together and build a sense of perspective around the culture of the school.

In our student community, while students are broken into Bands, these bands have an inherent institutional memory as all but the seniors are on a two-year structure. In this way, students in the 9th grade can maintain the culture they learned and built during
their 8th grade year, exposing students new to the school and new to the Band to the expectations of the school.

Also, we teach curricula in two year cycles, building into the school certain rites of passage that pass down through the school over the years—from the Greek Architecture Fair, to the Dam Debate, to the Farm-to-Table Feast, to the Senior Independent Trimester presentations.

Finally, while we do break into bands, we look for ways for old and young students to integrate throughout the day, the week, the trimester and the year. This happens in Wellness, through our small and open campus, in our Winter Field Study, and in Creativity Workshop classes.

The graph demonstrates a strong belief that we are welcoming new members, but also a relatively large (compared to other questions) percentage of members of our community who are ‘neutral’ to this question. It is further addressed in the final bullets to this question.

**Question 7:** There is a strong correlation between the stated mission of the school and the culture that exists in the school.

a. **How does the school’s mission influence the school’s culture?**

The school’s mission is the school’s culture, from the schedule, to how we approach our classes, to the classes we offer, to how we staff the school, to the layout of the school.

Our focus on adolescence drives student grouping (in four bands), the fact that each of these bands is taught by small teams of teachers, and the pacing of the day, the week, the trimester, and the overall year. Because we focus on the academic, cognitive, social, and emotional
elements of adolescence, we take each of these as important and essential, from discussing how a student is doing emotionally in math, to how a student’s behavior in Wellness might be informing how they write.

**Question 8:** The school’s culture promotes free and open inquiry.

*a. 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.*

Fundamentally, the school believes that adolescence is a critical time in identity construction. At the beginning of adolescence, each student identifies that he or she has a self—an internal voice, another perspective on themselves and the world, his or her copilot. An essential part of adolescence is to exercise and understand this voice. A critical part of this understanding is both expressing and exploring one’s own opinions, as well as being exposed to multiple viewpoints and other perspectives. Throughout the school, we expose and explore different voices, different perspectives, and different ways of seeing the world. We bring in experts in their fields into the classroom, whether that represents bringing in the “Living with Wolves” people and their commitment to having wolves in Idaho to the sheepherders who are interested in limiting or eliminating the wolf populations so that students may grapple with all sides of an issue in order to form their own ideas. When we run our mock election in the 10/11 band, we have students represent not only the Republican and Democratic Parties, but also the Libertarian and Green Parties. Students are asked, not only to listen to these sides of a debate, but are frequently asked to play a particular side—whether they agree with it or not. Through this consistent and persistent exposure, students exercise and experiment with who they are and begin to appreciate and work with a world of multiple and diverse perspectives.

Through our Field Studies Program, students are exposed to the diverse landscape of Idaho—culturally, socially, and environmentally. Students spend time on small organic farms and with major industrial agribusinesses. Students meet small NGO advocates for salmon recovery, and government representatives advocating dams and inexpensive energy. Students push handcarts along the Mormon Trail, walk Haight Street in San Francisco, and visit college campuses in the Pacific Northwest.

In weekly Community Action, students are exposed to The Hunger Coalition, the Advocates for the Survivors of Domestic Violence, Higher Ground, the Animal Shelter, and over 15 different service organizations working in our community over the course of the year. Through this real world component, students learn about people in our valley and beyond, learn about the struggles and challenges they face, learn about the challenges the natural world faces and how we can work towards a more sustainable future. They learn about perspectives from recent immigrants to the impoverished to the disabled to the needs of abused women to serving the natural world and animal life. This adds a variety of perspectives and world views beyond our daily curriculum, ones that are felt deeply and personally.

In weekly classes, students explore their voices in writing, and are exposed to the voices of authors over the ages. Math is a guided and self-paced exploration of the fundamental
courses, with exposure to applied math in Math Superblock on Fridays. All students take Spanish in total immersion, culminating in a two-week senior trip to Otavalo, Ecuador. Human Ecology explores local, regional, national, and global issues—both current and historical, exposing students to topics that range from the four Lower Snake River Dams, to the landscape of modern agriculture, to various religions of the world.

Friday afternoons are given over to Creativity Workshops and Independent Study, when students explore topics of their choosing through guided mentorship, or work with a faculty member in everything from building long-board skateboards, to college counseling, to knitting. Within this time, students can develop passions and skills over the course of several years; they can focus on music, art, or any other interest. Students are also free to study a diverse smattering of information and skills.

Through this exposure, students explore the great diversity of ideas and perspectives that are a hallmark of humanity. Through this exposure, each student is challenged to develop his or her own voice and to develop his or her identity thoughtfully and intentionally.

Interestingly, the graph indicates most strongly that the faculty believes that we are overwhelmingly, and unanimously, creating this culture. A few parents and students disagree, but a relatively small slice.

![Graph: School Culture Creates Environment of Respectful Exchange of Viewpoints](image)

- What are the school’s overall strengths in regard to school culture?
  Our biggest strength when it comes to school culture has to be our intentionality. All structures of the school are viewed and constructed through the lens of the mission.
Another significant strength of the school has to do with the quality of the relationships at Sage. From our daily schedule and culture to our conferences and our work in the community, students, teachers, and parents develop deep and lasting relationships with each other. The simple fact that students and teachers enjoy coming to school each day (on the whole, mind you), has been one of our proudest accomplishments. Inquiry, care, playfulness, and interest are present in every day at the school and it’s clear that incoming students feel the difference in the ways their peers and teachers interact with them. Students explore new ideas and ways of thinking within an environment that both challenges them and makes them feel safe. A rising 12th grader remarked that he felt as though Sage had allowed him to “develop peacefully” and that’s a sentiment we see other students sharing.

The focus on adolescence and ‘keeping the kids at the center’ of all that we do is central to our ability to develop these relationships.

Our relationships with other non-profits and experts in the community are another significant strength of our culture. The school has developed each band of teachers and students to be fairly independent from each other, which gives them the freedom to use the vehicles and get off campus without having to coordinate other schedules and structures that tend to inhibit these relationships.

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

Despite our strong relationships with certain groups in the community, the perception in the community as a whole of our school still needs to grow so as to accurately reflect our culture. As a young school with different approaches to learning and instructions, students and adults of other schools in the valley misconstrue the playful, close-knit culture of Sage and regard the school as less academically rigorous because it is also caring.

We would like to see growth in our parent community. While there is a robustness to certain elements of our parent community, there are gaps for us to tend to. Welcoming new parents into the culture of Sage seems to take some time, and we have yet to find a consistent way to do this. We have attempted some social events, but we have yet to develop a trend or a ritual that feels effective enough in this space. Despite structuring our SPA in a mostly decentralized fashion, we still tend to see a small handful of parents engaging the process much more than others.

We could also grow in our abilities to make sure new faculty feel welcomed aboard. We have tried a few strategies here as well- from creating informal groupings to discuss what is happening to appointing a faculty in charge of a handful of social events- but the percentages of faculty who rated the school low in this regard is worth tending to.

Some of the lower percentages in our surveys had to do with expectations of student and faculty behavior and performance. The larger gaps in these questions seem to come from our faculty themselves. We believe this is, at least in part, due to the transition that teachers go through in teaching at Sage. The culture is distinct and different, and we have had several teachers whose main source of teaching was traditional. Building the culture of understanding among our own staff members is something that we need to improve upon.
**Commitment to Diversity:** The school has created a program, culture, and inclusive community of students, families, trustees, faculty and staff that reflect many perspectives and diverse backgrounds.

Who was responsible for this section of the report? Sara Berman  
Faculty: Nathan Kolar, Kristen Barr, Julie Zimmerman  
Parents: Julie Cord  
Parent Editor: Kristina Kind  
Round 2 Review: Sara Berman, Kristen Barr, Amy Morrison

**Question 9:** The school’s overall program provides students with a school experience that is in keeping with the school’s commitment to diversity and the NWAIS Core Value of Commitment to Diversity.

*a. How does the school define diversity for itself?*

The Sage School defines diversity in the following terms: diversity of experience for students, age and developmental diversity, family structure diversity, ethnic, racial and cultural diversity, political diversity, economic diversity, and gender and sexual orientation diversity. The Sage School’s commitment to diversity in terms of equity and inclusion is evidenced in the school’s curricular content and overall school program and experience. Through community meetings, classroom academic discussions, and interactions with members of the community during Field Studies, Community Action partnerships, and Creativity Workshop/Independent Study mentors, The Sage School strives to create a positive environment where students and teachers are respectful of differing backgrounds, opinions, ideas and beliefs. The open and in-depth study of relationships is a keystone programming component of The Sage School’s curriculum, especially in its focus on Human Ecology. Built into the fabric of the school are events that raise awareness of diversity and highlight the diverse experiences and needs of the local and regional community and the nation as a whole.

The Board passed the following Diversity Statement at the end of October of 2016:

*The Sage School values diversity and believes our experiences are shaped by many factors, including age, ethnicity, family structure, gender, gender expression or identity, nationality, physical ability, race, religion, sexual orientation, and socio-economic standing.*

Exposing students, faculty, and staff to a wide range of ideas, experiences and cultures, examining and challenging preconceptions, and exploring different ways of thinking enhance the learning experience and reflect the school’s educational mission.

At The Sage School, recognizing today’s complex, changing world, we continue to build and sustain a diverse community to achieve a clearer understanding of our roles in an interconnected global community and to prepare us for lives of service. To this end, The Sage School’s inclusive approach leads to a welcoming, supportive, and healthy school community that both embraces differences and promotes genuine respect for each individual.
This was the result of several discussions and reviews by the Board. As a result of the statement’s newness (passed just over a month before our final version of the self study was released), the application of the new statement has yet to be realized, although the spirit of it has been in force in the school since its inception.

**b. Describe the school’s commitment to diversity in light of the NWAIS Commitment to Diversity.**

The Sage School is committed to including students of diverse backgrounds and creating a school community that exposes its members to a variety of opinions and experiences. As a NWAIS school, The Sage School holds these values at our core and aims to create and uphold curriculum, policies, and procedures that support our commitment to diversity. The Sage School Board is currently refining our policies and procedures surrounding our commitment to diversity.

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

The school’s primary means of commitment to diversity is through the experiences our curricula provide. We also deliberately bring students together in mixed-age groups during all school Community Action days (food collecting and gleaning in the fall), our Winter Field Study, and Friday mixed-grade teams for Wellness. The Community Action program also exposes students to the economic and cultural diversity in our valley. The faculty strives to use inclusive language by not using gender specific pronouns or by using a mixture of male and female pronouns when giving examples in class, for example. Our writing faculty chooses books that have diverse protagonists and authors; it is important that students see themselves and others in the texts that we choose. On our Field Studies, students meet experts in a variety of fields and from a variety of backgrounds.

A student’s seven years at The Sage School requires them to consider the importance of diversity in many forms. The 6/7 curriculum spends a year on family history, with students exploring their ancestry and detailing and comparing their family history with those of their classmates. The 6/7 spends its other year considering different ancient world views: Greek, Roman, Indian, and Chinese. The 8/9 explores racial, gender, economic, ethnic, and religious diversity in its studies of American history and demographics in its Social Relationships year. In their year on Ecological Relationships, 8/9 students participate in debates arguing for or against dam removal, researching and role-playing different sides of a regional issue. The process encourages students to recognize and embody different opinions and values. Studies of local sustainability and of the development of the American West in the 10/11 band curriculum has students focus on the social, economic, and ethnic diversity of our valley and the ways these interact with one another. We invite in outside groups like The Advocates for Survivors of Domestic Violence to run a Green Dot training with the 10/11 band, which focuses on diversity of many kinds, including that of gender and sexual orientation. The program speaks to why inclusion is so important to a healthy, non-violent community. The 12th graders focus on national and international issues, which culminates in a Salon/Coffeehouse, where students role-play as philosophers and scientists from throughout history, helping students inhabit other perspectives.
Through the self-study process, we have also looked at our admissions process. One of our realizations is that we never ask on any form for student’s specific racial or ethnic background. As a result, we don’t, in any formal way, even know of the ethnic or racial diversity of our applicant pool or our student body. We have viewed this new realization through a positive lens— that our school is open to any identity. However, it may not encapsulate part of the NWAIS mission of ‘furthering diversity’. There is work to be done for The Sage School’s admission process to further diversity of our community. Part of this would need to come in the form of additional scholarship funds, part of this in further reaching out to the Hispanic community of the Wood River Valley.

Diversity at The Sage School has primarily been assessed through the process of this self-study as a part of accreditation with the NWAIS. While the nature of our school allows us to constantly assess and consider our strengths and weaknesses, the reaccreditation every 7 years will give us a formal opportunity to reassess these policies.

**Question 10:** The school has defined what constitutes a diverse student body in accordance with the school’s mission and the NWAIS Core Value of Commitment to Diversity.

   a. **Describe the population of the area(s) from which the school draws students, including the racial and ethnic composition of this population.**

   The Sage School draws its students from Blaine County, and predominantly the cities of Bellevue, Hailey, and Ketchum. Blaine County residents are, on average, more affluent than the average citizen of Idaho, and Blaine County is also one of a few counties in Idaho that regularly elects Democrats rather than Republicans to state and national office. According to the U.S. Census Bureau, Blaine County now has an Hispanic population of 20.7% (recognizing that Hispanic is an ethnicity and not a race), with “Whites alone” comprising 76.9%, “Asian alone” 1%, and 1.5% identifying as two or more races. Blaine County’s age distribution mirrors that of the United States as a whole, while its level of educational attainment is significantly higher, with 44.8% of adults over 25 years of age possessing a Bachelor’s degree, compared to 29.3% of the U.S. population.

   b. **Describe the school’s goals regarding diversity in the student population and how the school is currently meeting them. If the school is not meeting them, what steps will the school take to meet these goals?**

   **Economic Diversity:** Our goal is for no accepted student or family to choose not to attend The Sage School for purely financial reasons. We offer families the chance to apply for financial aid. In the 2015-16 school year, 41% of students’ families received some type of aid.

   **Gender Diversity:** Our goal is to recognize the plurality of gender identity in our modern society, and support and advocate for students whose identities range along the gender spectrum. We recently, as an example, changed all of the school’s bathrooms to be gender neutral. The board is working on clarifying language in a Gender Inclusion Policy.

   **Ethnic Diversity:** Although we do not have as a goal that our student body’s ethnic makeup mirror that of Blaine County, our goal is to ensure that we communicate and market to all Blaine County residents and families equally. This will include marketing and advertising in Spanish to reach Spanish-speaking families. Our recruitment strategies should attempt to
reach every 5th-grader in the Wood River Valley, regardless of economic, ethnic, or geographic status.

**Equality of Experience**: In order for our student body to successfully include students of diverse backgrounds and identities, those students need to feel accepted and supported in their individuality. In cases where a student is in the minority in terms of gender identity, sexual orientation, ethnicity, or any other way, it is our goal that that student feel safe in their identity and therefore ready to learn. This extends to cultural diversity as well; our goal is to not only recognize our winter break as Winter Break in official institutional publications but also in the way that staff and students refer to that vacation in casual conversation. Our Secret Santa tradition has now been redubbed Secret Snowman. Our goal is to have students who practice religions less common in Blaine County (Mormonism, Judaism) feel comfortable sharing their experiences and beliefs. Our goal is to be purposeful in choosing topics of study, articles, and stories that represent diverse cultures and cultural practices.

**Diversity of Family Structure**: Similar to the above, it is our goal that students of any type of family structure feel welcome, supported, and accepted in our school. Our goal is to be mindful of our language and to make it inclusive at all times. An assignment that includes instructions to “talk to your mom and dad” may unintentionally exclude students who have grandparents as guardians, have a deceased parent, a parent who lives outside of the area, or who has same-sex parents.

c. **Explain how the school’s admission and enrollment management practices are consistent with the NWAIS Commitment to Diversity.**

When considering a student’s application for admission, the admission committee looks to the school’s mission for guidance. A mission appropriate student is ultimately one who is willing and interested in adopting and working towards these goals themselves.

Our school draws from every school in the valley and has students with wide ranges of academic abilities, social & emotional skills, cognitive abilities and interests. We give no pre-tests on any of these measures in order to keep our definitions of ‘readiness’ for Sage as broad as possible. This allows, not just for the students who score the highest math scores to be our pool, but the students who may be budding artists or non-conformists. It also acknowledges the power of standardized tests to create gaps in performance for minorities and under privileged students. We seek to cast a wide net through our admission process.

According to the NWAIS website “A commitment to diversity acknowledges and honours the diverse perspectives and backgrounds within the school community and makes every member feel that he or she belongs and is equally valued.” We believe one of the strengths of our school is a culture that values all community members. This commitment at Sage to make ‘every member feel that he or she belongs and is equally valued’ is reinforced in our Community Meetings, in our commitment to use Field Studies to develop our community, and in our mission focus on cognitive, social, and emotional skills as well as academic development. In short, this commitment should be palpable in our daily routine. It is also something that we also tend to in larger moments as well. When incidents occur that seem to violate this cultural value, we may hold a special community meeting in a particular band- as when some students in the 6/7 thought the students who came from the Montessori School
were forming a ‘clique’. We may hold an all school meeting to address issues that affect the entire community. Two years ago, for instance, we took the entire high school off campus for a lengthy group discussion when students felt that there were undercurrents of disrespect among the student body. Students spoke, teachers spoke, and energy was spent working to improve relations. All seemed to agree that it changed behavior patterns that were ‘stuck’ and moved the community forward.

**Question 11:** 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 and the NWAIS Core Value of Commitment to Diversity.

*a. Describe the school’s goals regarding diversity in the faculty and staff and how the school is currently meeting them. If the school is not meeting them, what steps will the school take to meet these goals?*

The Sage School is committed to hiring highly qualified faculty and staff that bring a high level of knowledge and expertise while also representing the population our community in Blaine County. The school values faculty members that have diverse and rich professional experience as well as life experiences that help to bring varied perspectives to our community. We are proud supporters and advocates for colleagues of all beliefs and backgrounds.

The Sage School’s faculty is almost equally balanced between males and females, and spans an age range of nearly forty years. Our faculty members come from diverse backgrounds and have myriad past experiences teaching and travelling all over the world. Our faculty’s worldliness is balanced by a deep rooted sense of place in our local community; Four faculty members were raised in the Wood River Valley, while many others have spent decades as members of the community.

*b. Provide specific examples of professional development opportunities for faculty and staff related to diversity.*

The Sage School makes an effort to keep abreast of issues of diversity through attending conferences and workshops that help keep faculty members aware of current perspectives, issues, and practices. Recently, a Sage faculty member attended an NWAIS conference on gender diversity in teenagers. Sage School faculty and staff have also worked conjointly with our board to research and gather information on diversity in schools across the nation in order to better inform our own policies.

*c. Explain how the school’s hiring policies and practices are consistent with the NWAIS Commitment to Diversity.*

In hiring new staff, The Sage School considers and values candidates from diverse backgrounds and who bring a diverse array of experiences to their teaching practice. To solicit candidates for open teaching positions, we advertise in a number of different sites and publications in order to widen the pool of potential hires.

- What are the school’s overall strengths in regard to the school’s commitment to diversity? The curriculum of Human Ecology throughout seven years at Sage has to be one of our strengths. It asks students to define themselves and find their own voice, but it also asks students to adopt and inhabit viewpoints other than their own. The team-taught course integrates four
different teacher perspectives on any given topic and underscores the essentially complex nature of relationships.

The close mentorship from teachers builds a community of trust, making diverse experiences, opinions, and perspectives more readily shared. Community Action exposes students to a variety diverse perspective and gives them an awareness of varying community needs. The teachers vary in age, gender, and experience and model collaboration and the necessity of both respectful agreement and dissent.

Overall, the school culture is our greatest demonstration of a commitment to diversity.

The need-blind admissions process and financial aid packages help the school be economically diverse.

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

As we move forward, we aim to improve our exposure to all potential applicants within our community. Our goal is to communicate and market to all Blaine County residents and families equally. This will include marketing and advertising in Spanish to reach Spanish-speaking families. Our recruitment strategies should attempt to reach every 5th-grader in the Wood River Valley, regardless of economic, ethnic, or geographic status.

We hope to continue to be purposeful in choosing topics of study, articles, and stories that represent diverse cultures and cultural practices throughout the bands. Within academics and casual discussions at school, we aim to be mindful of our language and to make it inclusive at all times. We recognize that language can carry great weight, and that we can create an inclusive community by being mindful of our language.

Overall, our goal is to continue discussion about diversity with the whole staff, and, in conjunction with our board, to craft a formal, written policy and set of procedures for supporting students with diverse identities and backgrounds.

Documents provided (available in the Google Drive files):
- The school’s statement(s) of non-discrimination.
**School Program:** The school provides a mission-congruent educational program designed and implemented to promote the development of its students and in keeping with NWAIS core values. The program benefits from ongoing assessment and research, is supported by necessary resources and services, and provides for the assessment of student progress consistent with the school’s mission.

Who was responsible for this section of the report? Chris McAvoy
Faculty: Entire 2015-16 Staff
Parents: Steve Thompson, Susie Michael, Nancy Fenn
Parent Editor: Nancy Fenn and Peter Boice
Round 2 Review: Entire 2016-17 Staff

**Question 12:** The school’s program is congruent with the school’s mission, philosophy and values.

_a. How does the school’s mission inform the development of the school’s educational program?_

A colleague once said: “your schedule is your mission.” At its simplest, he meant, how you spend your time, regardless of what you say, is what you value. We continually assess how (and whether) our time spent is a reflection of our mission. We look for congruence between what we say we do, and what we do.

We intentionally structure each day, each week, and the rhythm of the overall year to attend to the developmental stages of adolescence, to create experiences that promote the three cornerstones of our mission: self-awareness, community responsibility, and a sense of place. We also work to do all of this in a dynamic, intensive, and supportive environment focused on Human Ecology.

Our mission informs all that we do. The schedule dedicates time to Human Ecology, Community Action, Field Studies, Wellness, mindfulness, Skills Blocks (Writing, Spanish, and Math) and community meeting. We hire our teachers based on their ability and skill in working with adolescents, and working with the different elements of our mission. We intentionally designed our curriculum for specific developmental levels of adolescence. We hold the first and second parts of our mission in equal regard, at once building a thriving environment, and understanding that working with adolescents is a dynamic blend of academic, cognitive, social, and emotional work.

Specific examples of how our mission informs our school program are as follows:

**SCHEDULE**

The design of our schedule honors various stages of adolescence, and recognizes that people work best when they are active, engaged, and nourished emotionally, physically, cognitively, and socially. Thus, all aspects of the school day are part of our educational program. We start our year with Field Studies; it’s part community building, part regional awareness, part introduction to key curricular ideas, and part transition from summer. All students do Wellness each school day, during which they manage energy, build community, and play together. Our courses allow freedom of movement and fluidity to honor the need and desire for students to choose where they learn as much as what they
learn. We also provide enormous structure and recognize that clear descriptions and appropriate boundaries are critical in learning and communication.

SENSE OF PLACE
The school facility fosters the development of our educational program by providing light, outdoor space, an open floor plan, and communal space. The school is located close to natural areas, such as the river and local parks. The town center is also easily reached via transportation (bus line, bike, car). The natural, social and built worlds beyond our school are easily accessible and its location provides an appropriate blend of outdoor and indoor spaces for learning.

The five weeks of Field Studies that each student engages in annually further establishes a sense of place. Field Studies explore a region within a 300 mile radius of the school. We use this platform to “educate locally, apply globally.” Field Studies are the embodiment of Human Ecology – learning about topics where they are relevant.

COMMUNITY RESPONSIBILITY:
We develop community responsibility in our students through curricular projects designed around care and understanding of their roles within the school and throughout larger communities we are a part of: the Wood River Valley, the Pacific Northwest, and the globe. We have several moments throughout the day and the school week where community responsibility is a focus.

Every week, each student spends two hours in Community Action within our schedule. This is a time when the school community takes action for the betterment of the Wood River Valley and beyond. Over the course of each academic year, The Sage School will work with over 15 community organizations and partners (e.g. The Hunger Coalition, The Advocates for the Survivors of Domestic Violence, The Animal Shelter, Higher Ground, Swiftsure, etc.) helping advance their work and missions, which aligns with our mission.

As students research and study, they reach out to people and places in a 300-mile radius to serve as examples, mentors and academic resources.

Within our school community, cleanup is everyone’s responsibility. There are no janitors. We have a designated time at the end of the school day where the entire community divides chores and takes care of our space.

Four days a week, each band takes time for community meeting. This is a time to connect within each band on social information, social successes and concerns.

SELF-AWARENESS:
A fundamental aspect of adolescence is developing one’s identity and becoming aware of and respecting one’s self. Through purposeful diversity in student groupings and opportunities, we introduce students to an enormous array of experiences that help them understand where they feel most comfortable and where they feel most challenged. An environment that encourages reflection and self analysis (in hands-on discussions, in
Guided Self-Assessments, in student-led conferences) augments these experiences, so that students are able to refine their understanding of themselves.

**AUTHENTIC CURRICULUM:**
We strive for authentic projects and topics throughout our curriculum, whether in specific skill based courses like Spanish, Writing & Literacy, and Math, in project based courses like Human Ecology, or in broader programs like our Field Studies. Our curriculum is authentic in that it addresses local, regional, and global issues and focuses on questions that adolescents are naturally asking or that help inform their understanding of themselves. The intentionality of our program aims to help our students develop into engaged and thoughtful citizens who know themselves.

**b. In what ways is the implementation of the school program congruent with the mission?**
Our program holds equal the different parts of the first line of our mission. We see true importance in honoring the academic, social, cognitive, and emotional growth of our students. We implement our mission through a variety of concrete decisions about our schedule, programs, and curriculum. Our schedule shows the importance and value of Human Ecology by dedicating the most daily and weekly time to this subject. Our schedule shows our mission by integrating Community Action and Wellness directly into the school day as opposed to deeming those pursuits extra curricular. All of these aspects enhance student growth on academic, social, cognitive, and emotional levels. This intentionality moves beyond our schedule and into our decision to be non graded, the way in which we write our assessments, how we provide feedback, and our student-teacher relationships in general.

Our programs are focused around authenticity and the goal to serve adolescents. We do not give letter grades because they do not fully address a student’s growth as an intellectual or as a person, and thus don’t further our mission. We assess using authentic, real world measures, because we know that these experiences will allow students to best exhibit their growth. Having students grapple with the innate messiness of real world problems helps them build skills that enhance their development as individuals. Our feedback system has several different levels that help students grow on an academic, social, cognitive, and emotional level. Teachers write formal narrative reports three times a year for each discipline. Regular verbal feedback and shorter narrative assessments accompany each assignment. All of this feedback is built around a mindset that thoughtful, well integrated, and continuing assessment will help students grow as individuals.

The needs of the adolescent and the recognized importance of adolescence drive our program design. From the need for variety, novelty and playfulness, to the importance of mentorship and engaged work, we strive for a program whose intention, design, and construction aligns with its implementation and functionality.

**Question 13.** 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.
a. In what ways does the overall program promote, provide or encourage:
   i. free and open inquiry

The Sage School promotes free and open inquiry by creating a safe trusting environment where students can express their voice, by implementing a developmentally appropriate curriculum, by providing opportunity for individual choice, by following a schedule that allots time for curiosity, and by exposing students to a variety of perspectives.

A trusting environment is a prerequisite to adolescent inquiry. Within the classroom and throughout the greater structure of the school, teachers solicit student input, acknowledge it, and value it. Sage works to create an open, respectful community so that the students trust that they can speak and be heard. Through self-reflection and authentic assessments, students learn to voice questions, concerns, and opinions with confidence in both structured and casual environments. Students regularly participate in and often lead community meetings, project debriefs, and new faculty hiring committees. Students engage in classroom discussions, lead the classroom, present information directly to other students, and independently analyze information. Beyond the academic program, community relationships amongst students and between students, faculty, and families are additionally fostered throughout Field Studies, Wellness, community meetings, Independent Studies, and conferences. These experiences help students trust each other. Students refer to teachers on a first name basis, spend the greater part of each day at school with all of their teachers, and develop genuine relationships, which means they build trust in their teachers.

The Sage School creates and implements a developmentally appropriate curriculum designed to inform and provoke curiosity in different stages of adolescents. Faculty account for developmental readiness for free and open inquiry. We structure projects such as the Dam Debate, the Woodland Creatures Council, National History Day, Western Issues Documentaries, the Philosophy Roundtable, and the culminating Senior I-Tri around particular tasks and stages of adolescence.

While all projects fit within our curricular framework, Sage projects encourage students to have choices with their course of inquiry. The school constantly promotes a culture of curiosity through the tangible, relevant experiences the students gain during developmentally appropriate curriculum and Field Studies. Providing students’ choice is vital to the process of piquing adolescent curiosity, so many of our projects and assignments allow students to follow different avenues of discovery.

The Sage School’s daily schedule allots time for curiosity by including big blocks of time for long term projects, which gives students a freedom and openness to practice their ability to manage time and materials. Students have choice within this open structure to choose different resources, workspaces, division of time, and organizational methods. This structure leads students to experiment with different systems, and discover and develop those that are most effective.
ii. diverse perspectives
The Sage School’s overall program promotes, provides, and encourages diverse perspectives through a constant connection with the greater community, through a curricular structure that encourages consideration of different viewpoints, and through a team teaching structure that inherently provides varied perspectives. Beginning and ending the year outside the school in our field studies provides a platform for diverse experiences. For example, students visit Simplot feedlots and organic family farms. They speak about wolves with forest rangers and ranchers. They tour dams with dam operators and then speak with the constituents who want to tear the dams down. Beyond our Field Studies, Sage’s program connects students with the outside community through time spent in the field during Community Action, Human Ecology, and through the public component of our assessment structure. Our curricular structure promotes diverse perspectives by requiring that students adopt different viewpoints in writing, classroom discussion and debate, and through consideration of multiple sources. Our team teaching structure provides and models diverse perspectives through impassioned teachers who consider and/or come from different viewpoints/backgrounds.

b. What other characteristics or capacities does the school foster to prepare students to lead purposeful, healthy, and constructive lives?
The Sage School works to foster self-awareness, community membership and involvement, self-care, a habit of physical activity, an ability to identify and pursue one’s passions and interests, a habit of producing quality work, an awareness of social and environmental challenges. The school implements authentic assessments that have applications to life outside of school. All of these capacities are aimed to prepare students to lead purposeful, healthy, and constructive lives.

c. In what ways does the overall program promote these characteristics and capacities?
Self-awareness is fundamental to a successful Sage education and we promote it through weekly mindfulness practices and consistent self-reflection in the form of Guided Self Assessments (8/9), Friday Forms (6/7), conferences and narrative comments, authentic assessments, and community meetings. A year of the 6/7 curriculum is dedicated to the theme of “The Year of Self” and a student’s senior year grants them an entire trimester to creating a course of study about which they are curious and passionate.

Community membership and involvement occurs through weekly Community Action projects, mentored Independent Studies, Creativity Workshops, Field Studies, and authentic assessments and community meetings. We take the time stop and fix issues, whether they happen in Math, in Wellness, or in the field. This practice creates an ongoing discussion around community. We understand that changes in adolescence make community building both difficult and essential.

On Field Studies students live for periods of a few days to more than two weeks away from home and develop habits of self-care: how to dress to be outdoors in different weather conditions, how to plan, shop for, cook, and clean up after a meal, and the
necessity of paying attention to eating and sleeping habits in order to be alert and ready to learn.

Wellness occurs every day and encompasses a wide range of activities, promoting among all students the habit of physical activity as well as an ongoing appreciation of play and the outdoors. Our Community Action projects often require significant physical activity as well. Field Studies are also another time when students are physically active and outside.

An ability to identify and pursue one's passions and interests is crucial to a fulfilling life, and students gain this ability through the feedback they receive about their strengths and challenges and through the diverse set of options presented in Independent Study, Human Ecology projects, Community Action, Wellness, and Senior Independent Trimester.

Our assessment structure aims principally to instill a habit of producing quality work by having a variety of assessors (peers, teachers, outside experts), by providing feedback at many points in the learning process, by moving to a non-graded curriculum that emphasizes quality production and growth of skills over a letter grade, and by requiring students to produce quality work in order to get credit for a particular course.

Our curriculum, especially Human Ecology, focuses on awareness of social and environmental challenges, particularly regionally, from water shortages to wolf reintroduction to American race relations. Community Action exposes students to challenges in our community such as food insecurity and Sage Grouse habitat depletion. Community Action also helps foster a sense of social responsibility by giving our students opportunities to help often-marginalized community groups through work with organizations like The Hunger Coalition and Higher Ground. It also provides opportunities to foster a sense of environmental responsibility through projects that benefit organizations like Idaho Conservation League and Idaho Fish and Game.

**Question 14:** The school’s overall educational program and instructional practices stem from a set of underlying beliefs and assumptions about the ways students learn.

We do not have a published set of core ‘underlying beliefs and assumptions about the way students learn.’ However, in looking at our program, we do see critical beliefs and assumptions. While we aren’t quite sure that this list is complete, we have boiled those beliefs down to the following handful: Learning is rooted in development; Learning is an active construction; Intelligence is not fixed, it is diverse and classroom environments should accommodate these diverse intelligences; Learning is best accomplished when students feel safe while still being challenged; Learning ought to be relevant; and Reflection is critical to learning.

After several edits and inputs to versions of answers to this question, we decided it best, and least confusing to the reader, to have the belief bullet be primary, while placing each question *i-vi* under each core belief, thus reversing the order of the questions as written. We hope that makes for a more clear case for each of our beliefs and how the program is grounded in them.
a. **What beliefs and assumptions about how students learn inform:**

- Learning is rooted in development.

  **i. The design of the overall program?**
  The conviction that adolescence is a critical developmental window is the foundation of our program. We divide students into different developmental bands (6/7, 8/9, 10/11, and 12). Those developmental groupings and stages guide decisions for our curriculum. For example, during the 8/9 Social Animal phase of development, we immerse students in a year of learning about brain science, how we make decisions, and gender roles, among other topics that help inform their understanding of their social experience. The very size of our school is rooted in human development rather than a simple business equation. Dunbar’s number states that, anthropologically, humans can maintain relationships with about 150 people. Between students, teachers, and other experts in the community we work with, students will regularly interact with around 150 people.

  **ii. The design of the physical environment and learning spaces?**
  Most schools separate students by grade level and only rarely do those students have interaction between grade levels. At Sage, interactions between grades happen constantly. These casual interactions aid in the learning that occurs from students seeing each other at different phases of adolescence. Each developmental band, however, has its own physical space. This space reflects the band’s developmental stage and their physical environment changes at each phase. We intentionally integrate bands at other times during the day and during the year (all-school campout on fall Field Study, winter Field Study) to assist students in seeing the developmental range of middle and high school. Students see where they are, where they’ve been, and where they’re going. The open physical environment keeps developmental growth in the students’ constant awareness (even if not always consciously).

  **iii. What beliefs and assumptions about how students learn inform the use of technology in the school program?**
  Technological skills should be introduced incrementally and in a developmentally appropriate fashion. Our students are digital natives who also need to be taught how to have healthy relationships with technology. Adolescents are keenly aware of the power of computers and smart phones, and their heavy use of these devices can erode healthy, unmediated relationships to other people and to the environment. Therefore, we intentionally exclude digital technology from the large majority of Field Studies, have tech-free lunch each day at school, and are introducing aspects of the Human Ecology curriculum that are specifically tech-free.

  **iv. Approaches to instruction?**
  The Sage School caters our instruction to meet the differing needs of our academic subjects of Human Ecology, Writing & Literacy, Math, and Spanish by focusing on the differing developmental needs of our students during each stage of adolescence. We believe in the importance of choice, perhaps most especially during adolescence, to ignite curiosity and promote interest in and agency over learning. Additionally, we believe it is vital for students to experience the consequence of choice as self-
management and both controlled failures and successes are a way to allow students to become incrementally autonomous.

v. Curriculum development?
When we discuss potential new curricular paths the first question we ask is whether this change fits that specific developmental age. Just because one can teach successful unit on X, doesn’t mean X helps the students in their pursuit of their own identity and autonomy at their particular stage of adolescence.

vi. Structure of the school day and the school year?
The rhythm of each adolescent developmental group schedules our school day. We have enough teachers in each band so they can be independent from other bands and arrange the day according to student needs. The daily arrangement of classes, breaks, social and solo time as well as the weekly layout of different aspects of the program is different at the band level.

Other aspects of the school day and year may not be deeply rooted in adolescent development, but are rooted in far stronger cultural traditions that are difficult to resist. This reality is a source of discussion for us as we look for balances or compromises. Much brain research says that adolescents should start school at a later hour in order to protect their sleep cycles. A few schools across the country have made this move and we have considered it. The major reason we haven’t shifted to a later start date is due to students’ after school activities and commitments. As a school that has chosen not to create our own school teams and after school programs, we rely on a set of other programs, all of which follow traditional school models. As such, our school day starts at 8:20 and ends at 3:10. Our annual schedule is even more driven by cultural traditions than by adolescent development. Shifting from the traditional American school schedule is well beyond the capacity of our school. The stark reality is that families have so many commitments, camps, or programs over the summer and during traditional holiday breaks (e.g. Thanksgiving and Winter), that attempting to require the school year and school day to be truly rooted in development would not be feasible.

● Learning is an active construction.

i. The design of the overall program?
Students at The Sage School are active creators of products. We don’t give students a lot of tests, but they are tested often. All students create and act in plays, make models and videos, and design pamphlets for local non-profits. Our students practice active construction of knowledge as they progress through Sage. Students must engage the material with more than a simple pen and paper test in order to truly interact with, engage, and understand the topics at hand.

ii. The design of the physical environment and learning spaces?
Our school is filled with student constructions (e.g. work & projects) as models. The open space of the main building helps us stay connected and actively involved with each other’s learning. Students are constantly immersed in their classmates’ growth,
learning and constructions. In the design of our ‘ideal’ building in our strategic planning, the conviction that learning is an active construction informs the construction. Student work is a defining part of the physical environment itself.

iii. What beliefs and assumptions about how students learn inform the use of technology in the school program?
Digital technology is an incredibly powerful set of tools for students to construct active demonstrations of their understandings, and students will need technological savvy in their lives after graduation. Students gain technological fluency as they create videos, podcasts, web research, PowerPoint presentations, and use collaborative digital tools like Google Docs. The Internet is our primary research tool. At each band level, students are taught how to actively evaluate sources, find the best research databases, and generally how to conduct high-level research using the Internet.

iv. Approaches to instruction?
Project based learning is our most common form of learning in Human Ecology. It is active by nature, and is a best fit to this belief about how students learn. Our choice of OWL for a Spanish program relies on an active learning model. Even our choice of a math program, ALEKS, is based on an active construction of math learning. Students are actively constructing knowledge every day at Sage.

v. Curriculum development?
We commonly discuss how to create an active space. Unless there is some safety concern, we regularly remind our teachers that diving into the messiness of doing something can be central to the learning process itself. When we design a new unit, we frequently start with the product first: what will students create? This allows us to keep the active part of the construction at the center.

vi. Structure of the school day and the school year?
We see the trimester system as a perfect length of time for the active construction of engaging projects, and the choice of trimesters versus semester is a prime example of designing the school year around this belief. Ten weeks seems to allow ample time for deep engagement with material, without allowing students to become saturated and bored. Trimesters also provide enough novelty throughout the course of the year to be satisfying to the students. It is the space where we have found our balance between depth and breadth.

- Intelligence is not fixed; intelligence is diverse and classroom environments should accommodate these diverse intelligences.

i. The design of the overall program?
Students at The Sage School will engage in different modalities of learning in order to demonstrate understanding (working with hands, tinkering, building, discussion, storytelling, learning from people, writing papers, etc.) This belief is shaped in part by Howard Gardner’s view of Multiple Intelligences, and reinforces the components of our mission statement that define learning as a blend of cognitive, academic, social, and emotional elements. Learning outdoors and in community (naturalist intelligence and interpersonal intelligence) are also included to meet our mission. Students learn
the ‘growth not grades’ narrative and approach, which helps them to develop on all fronts – cognitively, socially, academically, and emotionally.

**ii. The design of the physical environment and learning spaces?**
For Spanish, the room is cleared of furniture to allow for free movement and plentiful interaction; for writing, we arrange desks so that the students face each other during literature discussions. We use the physical space to encourage creativity (students’ creative work is nearly constantly on display), openness (‘checking in’ with 8/9 students around our indoor campfire) and collaboration (discussing ideas around a large conference table). The physical environment of learning must also extend to the outdoors and to the larger community. Adolescents need to spend time outside. This need is sometimes academically inspired, such as the necessity of being by a river when studying water, fish, and riparian ecosystems, or visiting farms when studying agriculture. This need is also inspired by our mission – to foster in students a sense of place by getting them out into the field for five weeks a year. Cognitively, students (and teachers) benefit from the reset provided by after-lunch Wellness, making our bodies and minds once again alert and ready for learning. We make a point to get outside daily and to play in different spaces around the community including local parks, gyms and bike paths. These opportunities to play are crucial to students’ sense of social-emotional connectedness and wellbeing.

**iii. What beliefs and assumptions about how students learn inform the use of technology in the school program?**
Technology can also facilitate our ability to accommodate diverse intelligences. The diversity of projects that use technology- from video to podcasts to spreadsheets- all tap into a series of different intelligences and capacities. Our use of ALEKS is another example – students are in multi-ability settings where they work at their own pace. This allows us to speed up or slow down the traditional timeline of math instruction, depending on students’ demonstrated capacities. We have also used technology to assist other students with different learning needs through using tools like Dragon Speech or CoWrite.

**iv. Approaches to instruction?**
The entire day is treated as instructional time. We acknowledge our students both as people and students, and believe that one’s social emotional well being undergirds successful learning. Providing a variety of instructional groupings – such as team teaching, individual teaching, small and large peer groupings – enables students to value teamwork, be active learners, and contribute intellectually as well as socially and emotionally to the greater good. Employing a diversity of instructional methods (peer teaching, lecture, individual, small and large group projects) allows us to better meet the needs of students to express the different forms of intelligence.

**v. Curriculum development?**
We annually sit together as a staff and look at the broad spread of projects students complete in the course of a year and in their career at Sage. We look for ways to expand our uses of the diverse intelligences. Students complete projects that require skills in writing, acting, building, art, oration and more.
vi. Structure of the school day and the school year?
Try as we might, we cannot find a connection between the underlying belief about intelligence and the school day and year. Other underlying beliefs about the school day and year are more primary.

● Learning is best accomplished when students feel safe while still being challenged.

i. The design of the overall program?
From Vygotsky’s Zone of Proximal Development to brain research on the negative effects of cortisol on learning, The Sage School seeks to create playful rigor in order to find the sweet spot between boredom and anxiety. Community meetings, Wellness, and Field Studies all help build teacher-student and student-student relationships, which promote student comfort and encourage students to take risks and be vulnerable.

ii. The design of the physical environment and learning spaces?
The physical spaces in The Sage School are adaptable to suit different class needs. For example, we use desks, couches, carrels and other spaces to facilitate individual, small group and whole class work. These spaces provide different challenges and comforts for different students.

iii. What beliefs and assumptions about how students learn inform the use of technology in the school program?
The individualization of curriculum that technology facilitates allows different levels of challenge for students of differing capabilities. An ALEKS classroom, for instance, has students performing at many different levels in one space. It allows students to challenge themselves at a safe level, while getting assistance from teachers and students. Students are able to be honest with themselves and their classmates about their strengths and areas of growth.

iv. Approaches to instruction?
The most direct evidence of providing a safe and challenging learning environment is in the structure of the school itself. Small classes and a small school allow our instruction to align with this belief. Students need to be in a small ‘tribe’ in order to feel safe and accept challenges. The fact that teachers engage in Wellness, Field Studies, Community Action, and Creativity Workshop, among other daily tasks, all while engaging students during a two-year curricular cycle mandates that we spend hundreds of hours each year with our students. This allows teachers to know how to make a student feel safe and know how to present them with constructive challenges.

v. Curriculum development?
At the end and the beginning of every school year, each team of teachers engages in review of the projects and tasks, while the staff as a whole reviews our whole-school areas such as Wellness. In those discussions, as well as our steady stream of meetings during the school year, we are consistently looking at how students meet the curriculum. Is there too much challenge? Are they overwhelmed? Do we need to back off? Is it too easy? How do we layer it properly? We also focus intently on the social
dynamics of the classroom. Those can be a key reason why a student may not be engaging the curriculum, and may need to be addressed before they can connect fully with the content.

**vi. Structure of the school day and the school year?**
The connection between safety and challenge and the structure of the school day also eluded us. Certainly, there is a ‘balance’ to the length of school day and year that we strike to achieve, but that is rooted, again, in other beliefs more primarily.

- Learning ought to be relevant.

**i. The design of the overall program?**
The developmentally-based curriculum, along with our use of authentic assessments, helps structure content that is relevant to the students and to the real world. We believe that developmentally appropriate work is, by definition, relevant to the students. When those students are presenting their work to real-world audiences, such as our recent 10/11 presidential debates, the relevancy is increased dramatically. Students immediately see the relevancy in the audience’s reaction to their work.

**ii. The design of the physical environment and learning spaces?**
An authentic curriculum is essential to student learning and investment. Rather than contain learning to within the school walls, we treat the 300 mile radius around The Sage School as our extended campus to complement and enhance our curriculum. There is little more relevancy in studying anadromous fish in the Northwest than standing in the river with a group of scientists and netting the fish as they return to their spawning grounds.

**iii. What beliefs and assumptions about how students learn inform the use of technology in the school program?**
Technology assists us in our ability to deliver relevant curriculum. Whether we are tapping into TED talks for guest lectures or Skyping in experts from afar, we have added more relevant content through the uses of technology. The products students create also use technology and can assist in keeping skills relevant. Students have created podcasts, movies, interactive maps, infographics, and more.

**iv. Approaches to instruction?**
Whether in or outside of the classroom, exposing adolescents to a wide variety of teachers and mentors with authentic expertise in their field is key to their development as is providing students with supplemental education and experiences through outside resources such as the Advocates, Drug Coalition, and Flourish Foundation. The Field Studies program is a further extension of our approach to education in this model. Getting students in the community and field helps to demonstrate the relevancy of their learning.

**v. Curriculum development?**
Curriculum development conversations are constantly infused with the question of relevancy. There are really two major themes for relevancy: relevance to the developmental age and relevance to the real world. As we look at the relevance to the
real world, we believe the authenticity of our assessments provides relevant experiences for the challenges of the real world as well as constructing the skills required to succeed in it. To the extent we can develop assessments that are more authentic and relevant, we seek to enact them. In the 8/9, for instance, over the past few years, we have added a National History Day project to develop student skills in an authentic fashion and developed a biology unit into a full ornithology unit, complete with several field days where students learn to identify up to 100 distinct bird species as a team. We review our entire curriculum and seek ways to improve.

vi. Structure of the school day and the school year?
The flow of the school year- starting with an inspiring and relevant connection to the content through our field studies program, and ending with another field study capstone connects the students to the content in a meaningful and engaging way. The ten-week trimester is a sweet spot for engagement and relevancy.

• Reflection is critical to learning.

i. The design of the overall program?
We spend time at the end of each week (in the younger grades) and each trimester (at all levels) working on students' skills and habits of reflection. This occurs both orally, through multiple conversation and discussion formats (student-student; student-teacher; student-parent-teacher), and in writing (for oneself and for an audience).

ii. The design of the physical environment and learning spaces?
Students have freedom in our school to move around the physical space to find where they work best. They find nooks beneath the carrels, they work in the greenhouse, or they find a space outside in the sun. They use the physical environment to be with their classmates or to find spaces away from them. Much of the most successful reflection occurs during our Field Studies, inspired by the openness and change of pace provided by the outdoors. At times we will deliberately take students out of their everyday space in order to allow them the distance and perspective to reflect more deeply.

iii. What beliefs and assumptions about how students learn inform the use of technology in the school program?
Our focus on reflection makes us consider where and when technology is most useful. Technology may even hinder our ability to be reflective. In this age of instant access to information and entertainment on our phones and in our pockets, we consciously need to create intentional pauses in the day, week, and year for reflection, and typically do this without accessing technology. There are times, such as student conferences, where those reflections are typed up, but that typically comes after a pause away from technology.

iv. Approaches to instruction?
We put self-assessment as a skill in our mission precisely because we believe reflection is critical to learning and it needs to inform our approach to instruction. As a staff, we frequently discuss the need to structure reflection time in order to complete the
learning process. As teachers, we instruct different modes of reflection. After the students present a major assignment, you will typically find the class debriefing and reviewing it the next day. They write individual self-assessments on their own learning.

v. Curriculum development?
The most accurate way that we enact this belief in relation to curriculum development is through the teacher’s reflection process. We spend one week at the end of each year in reflection, and begin the year with two weeks of reflection and planning. Those reflections on curriculum are infused with the reflections that students have given us on the curriculum. Our reflections then inform curriculum development. In 2016-17, we have also enacted a bi-weekly writing reflection for faculty at our faculty meetings, known as SuGroMot (which is a combination of reflecting on needs for support, growth, and motivation).

vi. Structure of the school day and the school year?
Our school year provides natural opportunities for reflection. Our Field Studies mark conscious transitions within the school year. We transition in and out each school year with two weeks of Field Studies, where we spend a significant time in the natural world. Reflective activities are integral to this time in our communities and in nature. Students and teachers spend the last day of each school year in reflective activities, first in bands independently, and then as an entire school community. We have also separated the winter and spring trimesters with our Winter Ecology Field Study, creating another window of reflection during the year.

Question 15: The school utilizes quantitative and/or qualitative information to assess and improve its overall program.

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

We use the following quantitative data to inform the school’s assessment of its program: enrollment data, SATs, ACTs, PSATs, PSAT 8/9, ALEKS, AAPPL (The ACTFL Assessment of Performance toward Proficiency in Languages), ACTFL (American Council on the Teaching of Foreign Language) levels, OPI (Oral Proficiency Interview), family and student survey data, and college admissions and matriculation rates. Some of the above tests, namely SATs and ACTs, are not required of all students (although all typically take one or the other), but the data is still reviewed for feedback.

We use the following qualitative information: conferences with parents and students (including student led conferences) each trimester, weekly team teaching meetings, weekly faculty meetings, Pulse of the Parents Committee feedback, peer observations, assessment rubrics, student reflection of growth through GSAs (Guided Self Assessments), applications to The Sage School, standardized measures such as National History Day rubrics, and informal conversations with graduates about post-high school experiences.
Authentic assessments of student work like the I.Tri-the Senior independent trimester project, The Family History Play, a Farm to Table Dinner, Sustainability Studies, and Architecture Fair also inform our assessment of and decision-making about our overall program.

We plan to use the following data: CWR (College and Work Readiness); and Developmental Assets Survey to identify the skills, experiences, relationships and behaviors that enable our students to develop into successful and contributing adults. We are also looking for other qualitative and quantitative measures of self-awareness, community responsibility, and a sense of place. We want to measure how these attributes develop and grow in students over time.

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

We analyze and discuss the quantitative data to improve the school’s program in the following ways:

We use test scores to identify areas for improvement. For example, after reviewing PSAT and SAT scores in a faculty meeting, we implemented a test prep class for juniors during the spring trimester.

Our Math and Spanish programs use quantitative data to assess student progress and adjust the program accordingly. In Math, we follow student progress through the scope and sequence of the math program and evaluate if our courses are meeting students’ needs. For example, in the 2014-2015 school year, the majority of our students were not completing our Algebra 1 course in one year, and as a result we reworked the content to simultaneously prepare the students for more difficult courses and make the class a more manageable size.

In Spanish, we review students’ scores on the AAPPL and OPI assessments and our students’ progression through the ACTFL scale to assess progress and adjust classroom instruction as needed.

We review data from family surveys as a faculty and in small groups. In general, these data reassure us that our parents feel the school is living its mission. The data also point to areas of improvement. For example, parents responded that the Creativity Workshop presentations were too informal. In response, we changed the format of the presentation day. Occasionally, we have vocal parents who raise issues about certain aspects of the school program. We use family survey data to assess what percentage of the school community shares the view.

Our enrollment numbers help us to identify aspects of the program in which we’re succeeding and areas to improve. An attrition spike in the 8/9 has led us to evaluate the social and academic atmosphere of subsequent grades to help inform whether changes are warranted.
Various staff members (College Counselor, Assistant Head) review the colleges and universities to which seniors have applied and the decisions received, in addition to where students actually matriculate. We use these data, as well as qualitative reports of student success and satisfaction at various institutions, to better inform our college-counseling program.

We use qualitative data to analyze and discuss the strengths and challenges of school programming in the following ways:

Students reflect on strengths and weaknesses and areas of growth using various types of GSAs. Students share the forms with parents and band faculty, engaging in conversations that result in immediate feedback to faculty.

Tri-yearly conferences with parents and students provide us with immediate feedback on both academic and social/emotional development. The spring conference, which is student-led, provides faculty observational data on students’ ability to self-assess, to relate to their studies, and to the mission. The faculty meets post-conference to identify and analyze trends and to discuss possible improvements to the curriculum and methods of implementation. As a recent example, after the 8/9 conferences, it became clear that a significant percentage of the students were overwhelmed at the workload. Teachers could look and evaluate the workload, and, in this case, decided to alter a project to relieve some stress.

In our grade level bands, team teachers meet weekly if not more frequently to discuss the band’s qualitative assessments program, previous lessons and projects and plan for the future. We use each other’s feedback to inform how we teach and how we craft the curriculum.

The consistent use of rubrics for student assessment allows teachers to both provide feedback to students while also reflecting upon how to be most responsive to student progress. For example, a review of rubrics and assessments at the end of each trimester informs teaching instruction for the following trimester. A recent review of a math superblock project found that several of the students didn’t understand, or couldn’t produce, a graph needed for the project. In the following trimester, more direct instruction was added to this feature.

The faculty observes each other on a regular basis, both formally and informally. We seek to create a culture of improvement and supported self-evaluation. We form small, cross-discipline observation groups with the intention of each group member visiting each other’s classroom. After each classroom visit, individuals discuss observations and suggest ways to enhance classroom learning. We have also instituted our own biweekly reflection system, the SuGroMot, in which we write in journals for a brief few minutes during faculty meetings in order to reflect on our craft.

The Pulse of the Parents is a committee that has parent representatives from each band, as well as the Assistant Head of School and at least one lead teacher present. The committee meets every six weeks and has an open platform for discussion. The committee
uses these discussions to find guest speakers for PA meetings. We have had guest speakers on cyber bullying, college counseling, suicide, mindfulness, and abusive relationships. The teachers on the committee often bring back the parents’ issues to faculty meetings or to relevant staff members.

Even the student application to The Sage School provides feedback for the school. Applicants answer questions about why they want to come to Sage and what they think the mission means. When the school first began, we had a reputation of being an alternative school for troubled students. We used this feedback to clarify our program within the community, and now the language students and parents use more closely aligns with our mission.

**c. In what ways does the school assess graduate success relative to its mission?**
With 35 very recent alumni, The Sage School does not have a lot of graduates or data. However, we distributed an alumni survey in the fall of 2015 and 11 graduates responded (available in the Google Drive files). The survey assessed their strengths, challenges, and overall preparedness in their post-Sage School endeavors. The increasing diversity of colleges and experiences (such as gap years and work studies) that our students are accepted into and attend is one indicator of their relative success. Informal interviews with returning graduates are another. Prior to graduation, the faculty is able to assess potential graduate success based on the ability of seniors to meet the requirements of their Independent Trimester.

We look forward to doing more of this in years to come and being able to glean trends and apply lessons.

**Question 16.** The school has clear and effective procedures for the assessment and communication of student progress and/or development.

**a. How is assessment of student progress and/or development conducted?**
There are three areas in which we work to consistently assess student progress and development: academic & cognitive skills, social & emotional skills, and self-assessment skills. This set of skills seeks to help students develop and meet our mission.

We assess student academic progress differently within different classrooms. In Math, ALEKS puts students through multiple assessments per year that measure their skill development. In Spanish class, students complete an oral interview in the fall and spring, (accompanied by a written component as they age) which assesses and monitors their progress through the ACTFL scale. In Writing & Literacy, we have student writing samples that can be compared for progress over the two year band cycle. Kristen, in the 6/7, has also begun doing reading diagnostics on the incoming students. Human Ecology uses a broader set of assessments to measure a wider set of skills. Our assessments in Human Ecology strive to be authentic with real-world applications of our tasks that are performance and skill based. Over time, we want students to be able to demonstrate a broad variety of skills and intelligences. Students will present a model of a Greek building to a set of architects in the valley, will write and present a play to the community, and will...
create a Local Feast for 150 people over their years at Sage. This examples of student projects are authentic assessments – varied and applicable. Each project has a set of academic content and cognitive skills to develop, which are typically laid out in a rubric the students receive. The faculty also meet regularly to plan out the scope and sequence of the curriculum, discuss skills progression, and consider the appropriateness of the various projects and assessments. A standardized scale utilizing the PSAT 8/9, PSAT, SAT at our 8-12th grade levels, National History Day project at the 8th and 9th grade, and OPIc (Oral Proficiency Interview for Spanish) at the 9th and 11th grade measure students’ overall progress.

We assess social and emotional skills as the students progress through the stages of adolescence. The most common form of assessment we engage in is simple observation and dialogue. We regularly talk with our students about their own development. These informal conversations happen constantly throughout the school day and week. We discuss student development more formally with parents at three annual conferences. Many of the comments we make on trimester assessments are not only about the student’s academic skills, but set those skills in a social-emotional context. In collaboration with The Flourish Foundation (a local mindfulness education institution) we are creating a developmentally appropriate mindfulness curriculum to help foster our students’ social and emotional growth and each band participates in a weekly mindfulness session with the Executive Director of The Flourish Foundation.

Self-assessments are the final major form of assessments the school uses. We prefer to refer to the process as Guided Self-Assessment, as teachers help students with the process of assessing their skills and attributes. 6/7 students complete a weekly GSA (which we call Friday Forms). They assess their content, process, and skill development each week in written form, get their teachers to provide input, and then get their parents to ‘sign off’ and add comments as appropriate. In the 8/9, these GSAs shift to more of ‘meta’ level questions and occur less frequently. By the 10/11 and 12, there are no formal forms as students have developed a personal assessment system and we oversee certain students as needed. Self-assessment at the 10-12 grade level is formalized on each individual rubric for every assignment. Students at these grade levels self-assess the quality of each assignment before receiving teacher feedback. Additionally, every student in 6-11 conducts an annual student-led conference and the seniors lead both of the conferences during their senior year. When students become seniors, all of their conferences are student-led. In these conferences, they not only discuss academics, but also potential life futures. All students running their own conference have questions to consider, time to reflect, and time to practice with the teachers. All of these processes aim to teach the skills of honest reflection, guide student skills along the way, and improve their abilities to succeed in their own assessments.

b. How is an individual student’s assessment used in the development and/or modification of his/her academic program? How is assessment of student progress and/or development conducted?
In terms of academic progress, the answer is distinct for each academic subject.
In Spanish class, the teachers assess students’ level throughout the year and then confirm their assessment through standardized tests and measures, such as the OPI. These assessments define the students’ class level, which are determined in the spring of each year. The student’s ACTFL level helps determine his or her academic program and the content and skills to focus on.

In Writing & Literacy, teachers take into account different writing and reading abilities as reported by IEPs and modify student assignments as appropriate. The collected writing samples evidence student progress and development over the years. Keeping track of how students are performing on our rubrics, and using faculty meetings to discuss our skill and rubric development allows us to keep track of individuals and their skills.

In Math, students take initial assessments at the start of each year, which help place students in the appropriate math course. ALEKS administers frequent assessments throughout the year as students work through math topics. Teachers then pay attention to students’ pacing and understanding. Students approach and understand math with differing speeds, skill, and ability. When a student is ready to advance to the next course, they have the capacity to do so even if this happens mid-year. Assessments also help teachers determine when students need more time and attention to progress.

In Human Ecology, one of the most significant ways we assess and develop student’s individual programs is through having high minimum standards. Students need to meet the minimum standards for each project. As a general rule, students must complete all of their work to the level of the equivalent of a C+ or greater. If a student does not meet the standards, we issue an incomplete and set a time frame for them to meet the standards. If a student misses the standards more than one trimester in a row, we would conduct a set of meetings between parents, teachers, and administrators to begin a discussion about whether or not this is the right school for this student. We also work closely with students who were not meeting standards in order to guide their development. That may mean meeting with the student weekly, assisting him/her in time management or tracking assignments, providing or referring extra help, or creating different modifications that would assist the student in finding success. During these meetings and discussions with students and parents, we have also identified potential learning disabilities. We refer those students to either Lee Pesky Learning Institute or the public school system for testing.

c. Describe how these assessments and modifications are communicated.
Teachers formally communicate student assessments six times a year to parents. All students receive a written trimester assessment at the end of each trimester. In the middle of each trimester, a thirty-minute conference for each student communicates any assessments and modifications. Parents, teachers and students attend the fall conference to discuss the student’s progress. The second trimester conference is between only parents and teachers. Each student leads his or her own conference in the spring, guiding the teachers and his/her parents through their own development and assessments. In between the formal settings, more frequent communication occurs, especially for those students who are struggling to meet standards. It has not been uncommon for our faculty, since we know the students so well and on so many levels, to pick up on undiagnosed
learning disorders or ones that the parents had long since stop seeking modifications for. We have recommended testing for a handful of students over the years.

Question 17: The school has a written curriculum guide.

a. How is the curriculum guide developed and communicated?

Harry and Chris, working in conjunction with each other, mainly designed the initial curriculum structures, guided by the developmental level of each age group. At this point in time, we only had two bands— one for high school and one for middle school. As the school grew and we expanded faculty and bands, we worked together to articulate the vital questions and topics of each developmental age. We designed projects for Human Ecology that integrated key topics and skills, while connecting the students’ lives to the real world and creating authentic assessments for each project. Over the course of the history of the school, each band level team has modified those initial curriculum charts to create the best fit for the students and for the skills of that specific staff. The overarching structures have remained largely the same, but we have also made adaptations to fine tune the system.

The staff then spent the better part of the 2014-2015 school year using faculty meetings to develop its curriculum guides and scope & sequence for all curricular programs. We spent approximately one trimester in discipline groups: Human Ecology, Math, Spanish, and Writing and Literacy. Teachers reviewed what they had taught, discussed how skills grew and developed, considered gaps in the curriculum, and planned for improvements. We spent the next trimester in groups reviewing other parts of the curriculum: Wellness, Community Action, Field Studies, and Creativity Workshop/Independent Study. We approached those curricular sections similarly to the others, with exceptions surrounding the fact that most of these disciplines do not have a specific skill sequence, but rather a guiding set of beliefs that unify them.

At the beginning of each year, faculty meet in band groups and spend two weeks reviewing, planning, and organizing that year’s curriculum. This is where any new changes may be instituted. Faculty members discuss changes with Harry or Chris. During the in-service week at the end of each year, we weigh the effectiveness of the curriculum. The curriculum conversations are ongoing throughout the year, and any changes or additions are discussed accordingly. Teachers hand out overall curriculum charts, along with more detailed unit plans to parents at the beginning of each school year at a ‘back to school night’.

b. How is the curriculum guide reviewed?

We will continue to review the curriculum charts each year in the first two weeks of faculty in-service. We will meet regularly by discipline groups to discuss any changes, or desired changes, to the main discipline groups of Human Ecology, Math, Spanish, and Writing. Any changes to the other curricular groupings, we usually discuss with the entire faculty. New scope and sequence charts will reflect any changes.

Question 18: The school communicates and coordinates the program between departments, divisions and grade levels.

a. How does the school communicate and coordinate the program between departments, divisions, and grade levels?
Our main divisions are between band levels: 6/7, 8/9, 10/11, and the Senior Institute. Each band consists of teachers from a cross section of administrative and teaching disciplines. This structure facilitates frequent and consistent opportunities for communication within and across academic departments, bands and administrative duties. Each band typically holds a set weekly meeting.

We meet as a full staff weekly. The agenda for those meetings contains issues that affect the entire program and is decided by lead teachers, who meet in the morning just prior to the faculty meeting. We also meet as a full staff for two weeks before the school year begins and one week after the school year ends. This allows us to open and close the school year with appropriate time dedicated towards programmatic improvement.

The Head and Assistant Head of School also meet on a weekly basis to review issues facing the school.

A typical Sage School week looks like this:

<table>
<thead>
<tr>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
</tr>
</thead>
<tbody>
<tr>
<td>6am: Head and Assistant Head of School meet</td>
<td>(Informal or formal meetings as necessary)</td>
<td>6:30 Lead Teacher Meeting</td>
<td>7 am: Full Faculty meeting</td>
<td></td>
</tr>
<tr>
<td>7:30 6/7 Team Meeting</td>
<td></td>
<td>7:30 12th Team Meeting</td>
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<tr>
<td>7:30 12th Team Meeting</td>
<td></td>
<td>7:30 10/11 Team Meeting</td>
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<td></td>
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<tr>
<td>3:30 10/11 Team Meeting</td>
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We currently meet in academic departments less regularly than the above meetings, but did so during the years we reviewed our scope and sequence. Team members can call for academic department meetings as need arises.

The Sage School’s administrative structure facilitates communication. In a traditional school structure, there is often a gap between administration and faculty. The Sage School structure distributes administrative duties among the faculty. Faculty members sign up for these tasks upon signing their contracts and/or at the beginning of year faculty meetings. Additional committee members support coordinators of specific administrative duties. Administrative teams communicate their needs and information in meetings and by email.

We rely on frequent, informal communication and collaboration among faculty members. We often use Google Docs and email as collaborative tools. The arrangement of teachers’ desks aids collaboration and communication too. Each band of teachers typically shares a
physical space, with desks near each other, allowing teachers to have impromptu informal discussions and meetings to check each other’s understandings and refine the program.

**Question 19:** The school has reflected upon what constitutes excellence in teaching in a way that is appropriate to the mission of the school.

**a. What constitutes excellence in teaching at the school?**
An excellent Sage teacher guides students through adolescence by fostering an understanding of Human Ecology. Teachers are versed in different subjects and understand relationships as foundational to understanding. Teachers at Sage are charged with paying close attention to each student’s overall development including the growth of their academic, cognitive, social, and emotional skills. Knowing the students well is, of course, the essential prerequisite to being responsive to student needs. Good teaching includes building and maintaining the cultural values of the school. Teachers communicate and express care regularly, so students are able to feel safe in expressing themselves. Teachers and families partner to better understand and serve the students. These partnerships grow through regular feedback, narrative assessments, and tri-yearly conferences. Teachers observe and respond to the individual and collective reactions of their students to create authentic and meaningful learning experiences.

An ideal Sage teacher is reflective, collaborative, and curious. They are informed in progressive teaching techniques, and understand and implement different learning styles. They constantly seek to learn more in the realm of adolescent anthropology and the fields that they explore with their students. They join the school with experience in their field, and are able to share their passion for that subject through a deep grounding in its content. In these ways, a Sage teacher models the type of learning and engagement that we strive to create in our students.

Respectful, collaborative, and collegial relationships are fundamental to effective team teaching. By teaching in teams, Sage teachers model group dynamics and constructive interactions. Excellent teachers demonstrate how different areas of expertise compliment each other and provide more holistic understandings. Teachers also model learning as an ongoing skill, and demonstrate to students the importance of finding answers as well as being knowledgeable.

Excellent teachers give meaningful context to lessons and help the students make connections to their own lives. Providing authentic assessments is another way in which teachers demonstrate to their students the importance of quality work as well as the relevance of their studies.

A Sage teacher genuinely believes in and embodies our mission and strives to create a positive force in our society through its implementation.

Teachers at The Sage School also take on administrative roles as well as their teaching roles. This allows them to understand the school holistically.

**b. How does the school promote excellence in teaching?**
Promoting excellence in teaching begins with the hiring process. The hiring committee makes the mission central to its investigation of applicants to ensure that faculty bring not only the professional skills to the job but also embody the school's values and goals. Ideally, applicants come to school for a full day visit during which they interact and engage with students both informally (through observing classes and participating in Wellness) and formally via a committee of student-interviewers.

Once hired, new faculty members receive the Faculty Handbook that specifies the expectations and responsibilities of their position. Senior faculty members provide new staff with a separate orientation and training session at the start of the school year in order to better integrate them into the school's fabric and culture.

Faculty members continue developing their professional skills and the school supports them in these endeavors. Examples include: attending the annual Learning & the Brain Conference in San Francisco; bi-annual Wilderness First Aid courses (or Wilderness First Responder re-certifications); OWL teacher training workshops; attending Sun Valley Center for the Arts lectures; attending Self-Study conferences; taking advantage of visiting experts such as Kim John Payne; using the Sage curriculum as a case study for a Master's thesis; attending a Kahn Academy conference; and a Green Dot conference. Beyond these formal professional development opportunities, Sage teachers are engaged in professional development via the inherent nature of delivering our curriculum. For example, Spanish teachers have the opportunity to engage with native Spanish speakers while leading the yearly senior trip to Ecuador; Human Ecology teachers engage with professionals during Field Studies and Human Ecology projects.

The school's structure and collegial atmosphere lend themselves to frequent feedback between staff members; teaching alone in an enclosed room is the exception, while teaching with others or being observed (formally or informally) by colleagues is the norm. Discussions amongst the Sage faculty and staff often turn back to the school’s mission. Transparency, trust, and respect among all faculty and staff members fosters a culture of improvement. The various structures and groupings of faculty (i.e. bands, departments, administrative committees, and small professional development groups) build in collaboration and mentorship. The many various configurations of discussion groups lead to myriad opportunities for collaboration, support, and growth and help the whole staff function as a cohesive team.

Finally, The Sage School recognizes that feeling a sense of balance is crucial to excellence in teaching. This may be the balance between the personal and professional realms, which is respected by a school-wide closure during July and maternity/paternity leave, among other elements, or the balance between physical and psychological needs. Attending to the whole person, not simply the teacher, helps promote excellence in teaching.

**Question 20:** The school has developed the necessary services to nurture, support and meet the social, emotional, physical and learning needs of its students.

  a. Describe the services and/or programs aimed at nurturing and supporting the social, emotional, physical and learning needs of its students.
The school is intentionally structured to recognize that adolescence is a critical window for developing academic, cognitive, social, and emotional skills. All students have specific learning needs, and our school is structured to support this. We also recognize that social, emotional, and physical learning needs are interrelated, overlapping, and complementary. Examples of how these services and programs are embedded in the structure of our school are as follows:

- **Non-graded evaluations and conferences:** The Sage School intentionally implements a ‘growth not grades’ format for assessment. Before the end of our trimester evaluations and conferences, teachers in each band either meet in teams to discuss each student from academic, cognitive, social, and emotional perspectives or use an ‘advisory system’ in which each teacher tracks a small number (typically 8-10) of students for a trimester. Our discussions, observations, and narratives capture the depth and breadth of our understandings of each child.

- **Course Structure:** Our academic courses are broken into two general groups- skill-based blocks in Writing & Literacy, Spanish, and Math, and a larger Human Ecology block. Skills blocks address subject areas that need to be practiced daily in order to gain mastery. Human Ecology integrates natural science, history, social science, art, technology, and design. Human Ecology is an integrated, interdisciplinary experience in which students investigate and inquire throughout multiple hour block periods and trimester long projects. The extended scale in which Human Ecology occurs allows students to see things holistically.

- **Wellness:** All students participate in Wellness, a block specifically designated to manage energy, promote group play, and build community.

- **Community Meeting:** Each band has a community meeting four times a week to create a space to discuss the social and emotional health of our community.

- **Mindfulness:** The entire school engages in Mindfulness practices with the Flourish Foundation once a week as a way to develop social, emotional, and cognitive skill sets.

- **Feedback:** Feedback occurs on many levels, from a casual day-to-day basis with an individual student, to community discussions, to formal comments at the end of each trimester, to conferences in the middle of each trimester. The openness and range of feedback supports the range of student skills and needs.

- **Individualized, adaptable and flexible social, emotional, physical, and learning plans:** Teachers, parents, and educational professionals collaborate to develop individualized learning plans for students.

- **Flexible Curricular Planning:** Teachers modify project design and objectives in response to student readiness and execution.

- **Field Study program:** We study in the field five weeks a year to enhance student experience in all aspects of our program and to promote community building.

- **Peer teaching:** Students are regularly required to teach and present to one another, which encourages empathy, empowerment and allows students to solidify learning through teaching what they know.

- **Group Projects:** Students develop interpersonal, collaborative skills around multidisciplinary topics by working in groups towards a common goal.

- **Creativity Workshop:** Teachers offer a choice of Creativity Workshops. Students gain exposure to a new skill on a weekly basis over a term.
- Independent Study: Students have an option to design an Independent Study instead of joining a Creativity Workshop. This gives the students the opportunity to exercise creativity and responsibility to explore a study/skill of interest.
- Community Action: Each band engages in Community Action once a week for two hours, which allows us to focus on the importance of social awareness, action within our community, and responsibility to our community.
- Clean-up: The entire school community participates in daily clean-up at the end of the school day, which covers the needs of the school. This promotes social responsibility within our community.
- Lunch: Each day the entire school has lunch at the same time. This is a tech-free period that enables students to move in and out of small groups of their own desire and design, and to gather casually in the middle of the day.

b. Describe the process for introducing students and families to outside services designed to meet the students’ needs?
There are two general ways that this happens: 1. When, over the course of our getting to know a student, the school recognizes the student is struggling or challenged in a particular way, and 2. When the student comes to the school with an already identified concern or challenge.

Because of the age of our students, the second scenario is more common. There are times when teachers, parents or educational professionals identify a student as having a particular challenge or a different way of learning. Partly due to the small size of our school and close relationships with students and parents, this often comes out organically in conversations with the student, in discussion with the parents, in classroom observations, in email correspondence, and through other avenues of communication such as school records.

After a series of conversations, the school puts parents in touch with resources that are intended to meet the need: the Lee Pesky Learning Center for additional testing (should that be warranted), individual tutors (if the challenge is subject specific), and/or counselors. Because we are a small community, the referrals are to a small group of professionals working in our area. We do not, as a small school, have a large enough staff to

In cases where students come with already diagnosed or defined challenges, the school works with the family and the support system to determine the best ways for the student to handle their work. This often involves connecting all of the people – parent, student, teacher, and outside professional – and working to design the best plan.

c. What accommodations does the school make for the special needs of individual students? Please give examples.
Our program strives to meet each student where he or she is on an academic, cognitive, social, and emotional level. To do this, we have a robust conversation with parents, other professionals, and the student to develop learning plans, social environments, and skill building schemes that meet the student at his or her point of development. Below is a list of specific accommodations and methods we use to meet individualized student goals:
• Allowing students to audit language classes so they may still be immersed in the language program, while releasing them from the pressure of needing to earn class credit.
• Emailing families weekly for specific students to allow for constant contact with parents on the progress of their student on academic, social, cognitive, and emotional levels.
• Supplementing help in math (math teachers are available before school and during lunch).
• Individualizing assignments to meet accommodations and recommendations from outside organizations like Lee Pesky.
• Assessing in a style that acknowledges a student’s strengths and weaknesses.
• Communicating directly with outside tutors to make sure that student needs are being met at school and in supplemental programming as well.
• Using audio books as an additional way to augment a student’s reading comprehension.
• Finding organizational methods and time management methods that work for individual students.
• Individualizing learning timelines that recognize an appropriate rate of progress in Math and Spanish.
• Communicating during absences; modifying of assignments or complementary assignments.
• Offering independent choices through Independent Study on Friday afternoons.
• Allowing students more time, as needed and not abused, to complete projects to meet minimum standards.

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

Regular communication throughout the Sage experience – through conferences, comments, and emails – supports open discussions with students and parents that help to identify a student’s strengths and weaknesses on a social, emotional and academic level. These discussions reflect upon the authentic assessments that we regularly use to connect Sage education to life outside of school. Our program offers College Counseling throughout the eleventh and twelfth grade years, with the option of preliminary discussions in ninth and tenth grade. Additionally:

• Fostering self-awareness in students so that they can make beneficial choices about their future.
• Visiting colleges during for the 10/11 spring Field Study to allow students to explore college opportunities with their peers and teachers.
• Traveling internationally and providing immersive experiences to expand horizons for seniors on their transition from The Sage School.
• Providing opportunities to individualize Independent Study and Community Action projects based on specific interests and passions (e.g. mentored photography or an online course in Biology or Chemistry).
• Creating an environment of open discussion between students, teachers and parents by formalizing the discussions into conferences.
- Exposing students to professionals in the context of academic programming throughout their time at Sage, as guest speakers, experts in the field, and authentic assessors of students’ project work.
- Offering on-campus opportunities for formal assessments to compare students nationally and to help define individual strengths: PSAT, National History Day, and American Council on Teaching Foreign Language assessments.
- Structuring the Senior curriculum to begin with a Wilderness Leadership Course, have them engage in a year-long relationship with a non-profit of their choice, and ending with a fully self-led Independent Trimester.

**Question 21:** The school develops information literacy in its students.

*a. Describe your information literacy/library program and its goals.*

We teach information literacy in the context of our Human Ecology curriculum, Writing and Literacy program and through our Math program, ALEKS, which is online and partially self-directed. While the Internet serves as the primary research mode for students, The Sage School exposes students to information in a wide variety of mediums and perspectives. One goal is for students to be able to first recognize the need for information, and then filter, extract, and interpret main ideas from multiple sources. Another goal is that students will be able to determine the quality, credibility, and biases of a source. Human Ecology projects require students to use diverse sources such as interviews, lectures, films, books, articles, primary documents, and data collection.

At the 6/7 level, students learn how to search the Internet effectively and attribute their information. At the 8/9 level, we teach students MLA formatting more explicitly while continuing to teach about quality of sources and the how to filter out main ideas. In 10/11, students continue to learn about MLA formatting and often begin projects with an annotated bibliography that assesses source credibility, bias, and assists with information processing. Students learn how to optimize using database searches (EBSCOHOST, Lili) for journal articles. By senior year, students are expected to independently write a college-ready paper that correctly cites varied sources.

Our library program is designed around using community resources and library visits in the region, including The College of Southern Idaho and The Regional History Library. A primary goal for this program is to ensure students have the skills to research in larger academic institutions. We also have a number of desktop computers that are available to students during the school day and a fleet of laptop computers for each band.

*b. How does your information literacy/library program support the school’s overall programs?*

Information literacy is essential to and integrated into our school’s overall program. Students’ Human Ecology projects should reflect rich and varied research that displays a student’s information literacy. We present developmentally appropriate means of information collection, and we evaluate the quality, credibility, and biases of the information a student has used through our authentic assessment structure. The skills taught in the information literacy program enable our students to engage in authentic
projects, like family history research in 6/7, participation in a debate on dam removal in 8/9, and the creation of a sustainability map in 10/11, and an Independent Trimester as seniors. Their success in these endeavors demonstrates mastery of these skills.

**Question 22:** 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.)

- **a. Describe the use of online education and/or distance education at the school. Be specific regarding program development, scope, and number of students involved. Describe how/why these decisions regarding distance education were made.**

- **b. How does the school’s mission inform the development of the online education and/or distance education program?**

- **c. How are these courses congruent with the school’s beliefs about how students learn?**

- **d. What is the relationship between the online/distance education program and the overall school program and school culture?**

- **e. How does the school assess and evaluate the effectiveness and impact of online education and/or distance education at the school?**

**Question 23:** 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. (The co-curricular program may include clubs, sports, after-school activities, competitions, summer program, trips, etc.)

- **a. Describe the school’s co-curricular program and explain how it supports the school mission and program.**

The school has intentionally decided not to create a co-curricular program. There are two major reasons behind this decision: a desire to see all aspects of our program as ‘curricular’ and the unique nature of this valley.

Many schools would label courses such as Wellness, Field Studies, Creativity Workshop, or Community Action ‘co-curricular.’ Due to the fact that our mission holds us to teach “academic, cognitive, social, and emotional skills,” each of these courses holds curricular value and is central to our mission.

The second reason relates to the valley in which we live, and mostly explains the lack of an after-school life at Sage. After school, students disperse to a wide range of high-quality activities throughout the valley. We see neither the need, nor the wisdom in competing with these activities. The Wood River Valley is unique in the number of sports and activities that exist independent of the school system. Students on these teams and activities may attend any school in the valley. Students can dual enroll in our school and Wood River Middle School.
and Wood River High School, so they can participate in any activity or sport offered at these schools, free of charge. This allows students to participate and compete at a higher level, since they play larger schools and our school is too small to field competitive teams. We have had students on nearly all of the teams of the public schools, and have had Sage students even serve as team captains. In summary, our students have many co-curricular opportunities through our partnerships in the community.

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

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

Question 24: The school has the necessary resources to support the overall educational program.

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

We have the physical space and the resources to meet our needs, including hiring the appropriate number of teachers to serve our students. We meet the basic classroom needs of tables, chairs, computers, and supplies, the larger spatial needs of 90 students and 14 staff, and the equipment and logistical requirements needed to spend nearly five weeks in the field each year.

We have run into problems providing consistent Wi-Fi to all of our students over the past few years, but during the fall of 2016, those problems seem to have been significantly mitigated. We have struggled to find local Internet resources with adequate distribution power at an accessible price to reliably support the number of students needing to access the Internet.

Although our physical space and equipment resources meet our current needs, our ultimate vision includes an intentionally-built campus that is as sustainable as possible and that supports the expansion of our programs to include a commercial kitchen, production greenhouses, working farm, workshop and studio space. We will share these spaces community-wide to create a thriving model of economic, social, environmental, and cultural sustainability.

We also recognize that the full expression of our vision will require further investment. Our Strategic Plan identified our priorities: Teacher Compensation, Financial Aid, Facilities, furthering our community partnerships, and the programmatic areas listed above. We have the resources to support the overall program, but also see areas we can strengthen for the future.

b. 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?

We have sufficient physical resources to meet the immediate needs and goals of the program; however, we are continually addressing the challenge of obtaining the resources that we envision will optimize our program. We are currently doing this by:

- Prototyping what we do in scalable iterations (e.g. the greenhouse)
- “Banking” the program until a later date, but researching them now (e.g. a farm)
Using outside resources that have versions of what we want to do (e.g. the commercial kitchen, gym space, and various facilities)

- Continuing to build a community of partners
- Making the space that we have as multi-purpose as possible
- Supporting student fundraising efforts for special interest activities (e.g. dances, community service projects, etc.).

**c. 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.**

Overall, the last five years have been a refinement of our budget and allocation of resources, rather than any significant overhaul. We still have the major categories of cost: faculty and staff, facilities, Field Studies, financial aid; but we have made refinements to the allocation amounts. For example, we started with a Field Study budget of $500 per student and are now at a more realistic number of $1000 per student per year. Our budget has grown in proportion to the growing needs of our increasing student body. This growth in our budget has necessitated the hiring more staff, buying more supplies, and purchasing additional vehicles, etc. The proportion of the funds allocated to each budget area has not changed greatly. This stability of our overall budget allocations has allowed us to effectively track what we use from year to year and then refine each budget area based on those observations.

- What are the school’s strengths in regard to the school’s overall program?
  The first and foremost strength of our program is our congruence with our mission. As a small school with a nimble faculty, we continually evaluate and assess our effectiveness. Staff members are dedicated to interpreting and living the mission in a way that aligns with the founding ideals.

  Closely related to our ability to live the mission is the intentionality of our design and the internal consistency that is created as a result. These strengths come from an ever-present willingness to look at the system, see if we can do better, and develop the appropriate programs to allow us to succeed.

  Another strength of the school has to be its commitment to our students, their social and emotional well-being, and the overall culture of our student body. The best proof that we are living our mission is our students. On a whole, they are happy to come to school, the feel they are valued, and they feel as though their education is relevant.

  A simple and straightforward measure of the strength of our program is our very existence. We are a novel program, intentionally not backed by I.B. or Expeditionary Learning or other national program, and we have steadily grown since our inception. Having and maintaining 90 students in a small valley that already has excellent educational choices is not something lost on us.

- What areas of growth and/or recommendations does the school have in the overall program?
  One of our largest areas of growth in the coming years is to seek and develop some external, third party measures of our success. We have looked at standardized tests such as the College
and Work Readiness Assessment and the Developmental Assets Profile, which more accurately measure some of our goals and program. We have also looked at developing some partnerships to help us in this regard.

The development of our staff is an area that will need some attention in years to come. While we have been successful at certain types of professional development, we have also had a fair number of staff turnovers. When relationships are so much at the core of what we do, this has provided some challenge. Identifying ‘mission appropriate’ staff turns out to be a challenge, as the task of teaching at Sage is unique. Most schools are simply hiring for a quality Science teacher (or the like) for a very specific task- 3 classes of Biology and 2 of Chemistry. From being in the field to social-emotional development to non-graded assessments, our staff is asked to rethink how they were educated and seek new paths. It is not always easy to determine a potential match to these ideals in a brief interview. We have learned it takes at least the first year for a new staff member to understand all the workings of Sage. Searching for a way to help us clarify and construct those understandings for new staff is a task for us to continue to work on.

Optimizing our program, and all of the aspects of the vision, continues to be an area of needed growth. We hope to have a full kitchen and a design workshop in order to fully live our vision. In the meantime, we need to continue to develop partnerships in the community to have students participate in these sorts of programs.

Technology is an area of needed growth. We have mentioned inconsistencies in our Internet service, but more than that, we have not had a dedicated person to keep and maintain our computers and technical services. As such, updates do not happen as frequently as they ought, and we have no consistent oversight and plan. It has been an ‘administrative duty’ that a faculty member has taken on over the years, but no one individual has really had the skills or the desire to analyze and develop an overarching technology plan.

Developing more consistent relationships with certain outside organizations is also an area of needed growth. When our students have an IEP, they have typically had to work with the private Lee Pesky Learning Center at an additional cost. However, certain families have struggled with that financial burden, and the students weren’t served as well as they otherwise might. Developing a closer relationship with Lee Pesky and the Blaine County School District will better serve those students. Developing a closer relationship with Wood River High School will also better assist students if they choose to transfer between the schools.

Documents be provided (Available in the Google Drive Files):
• School Calendar
• School Daily Schedule
• Curriculum map (on site)

EDUCATIONAL PROGRAM COMPONENTS

Question 25: Each of the school’s educational program components is effectively designed and implemented: HUMAN ECOLOGY

a. What are the goals for your program area?

Human Ecology is an interdisciplinary study of humans and their natural, social, and built environments. This program area is the central organizing principle of our curriculum for the
following reasons, each of which helps demonstrate our goals. We also highlight the importance of self-awareness, and studying and understanding “the self.” This is a critical component of adolescence, and an essential part of our curriculum in all aspects.

1- A daily time to look at the integration of disciplines. In *Earth in Mind*, David Orr points out that studying the “discipline-centric education that enabled us to industrialize the earth will not necessarily help us heal it.” Time each day looking for commonalities, for crossing disciplines, for doing the work of integration is of vital importance. Human Ecology establishes independent credits for History and Social Science, Science, and Technology, Art, and Design into one extended period.

2- Project Based learning with authentic assessments. Topics in Human Ecology are rich academic experiences with hands-on and real world components. Human Ecology is where we can engage students in projects that range from two weeks to twelve weeks, and which help students build and develop the essential academic, cognitive, social, and emotional skills they need to be fully engaged, participatory members of their community.

3- The ability to use this curriculum to map the adolescent journey. The curriculum is rooted in the adolescent experience (see The 7 Tasks of Adolescence document). We trace the journey from young explorers, through the social age of early adolescence, to the local and immediate responsibilities of a maturing individual, through the reaches of a global citizen. The vital questions of adolescence expressed during each of these phases become the foundation upon which our projects are built.

4- Meeting of our mission. This design allows us to best meet three anchors of our mission: developing self-awareness, fostering community responsibility, and creating a sense of place, and helps our students with identity construction, the ultimate task of adolescence.

5- Citizenship. To teach the key skills and content of historical and scientific studies so that students may enter college and citizenship prepared and engaged.

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

We have an internal benchmarking that is based on the developmental stages of adolescence that we recognize. Adolescence, rather than a monolithic entity, is a gradation of development. We break our students into four distinct groups: 6/7 - the Explorers, 8/9 - the Social Animals, 10/11 - the Local Apprentices, and 12 - the Global Citizens. Furthermore, we have identified seven understandings that our students work on through grades 6-12: Understanding the Self, Understanding the Ancients, Understanding Natural Systems, Understanding Social Systems, Understanding Modern Systems, Understanding the American System, and Understanding Global Systems. We use our band structure and these understandings to create and define our work.
Our curriculum binders contain all of the rubrics we develop for each major project. Those are designed by the teachers of each band, create a set of benchmarks for each student to achieve, and are developed for each major Human Ecology project each year.

While we do not specifically structure our curriculum to fit such things as the Common Core or to National Science Education Standards, we have looked at them and we consider them in our curriculum development. In our planning phases, we refer to standards and consider how to integrate key content, skills, and experiences within the developmentally appropriate timeframes, while also still serving the overarching content of Human Ecology most effectively.

We are adding other benchmarks to the curriculum as we develop it. In the 8/9, we have added a National History Day Component and are working on having all students Master Naturalist certified. These external, standardized assessments are helping us to provide an external frame of reference for the work we are doing.

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

i. What research and information is utilized?

We use the phrase “adolescent anthropologists” to describe our relationship with our students and with adolescence generally. We define this as a process of gathering information on our students and adolescence from direct observation, from conversations within our teaching teams, from discussions within the faculty, through contact with the parents, from reading books and articles and watching TED talks. We gather information from as many sources as possible.

We also rely on the expertise of the Lead Teachers for this determination. We meet as a faculty on a regular basis to review the curriculum. We spend two weeks before students return in the fall and several days after graduation debriefing the curriculum. It is here that changes are made to the curriculum charts. The Lead Teachers set the tone for those discussions and all teachers offer observations and suggestions. During those meetings, we consider the effectiveness of the previous delivery of the curriculum, we consider any holes that may not be covered by our entire curriculum, and we consider what are the best topics for the specific developmental levels.

We have a document we call ‘An Anatomy of a Project’ which lists a 5 step process to develop a new curriculum or to alter a previous one. The first step starts with the developmental level of the student; we consider what the right questions and topics for that specific age of development are. Next, we consider the Vital Questions or problems that can drive the topic. We are interested, rather than starting with a textbook and ending with a test, in starting with the vital questions of the ages: Who am I? What is justice? What does it mean to be an American? etc. Then, the faculty integrates key content and skills from the Social Sciences/History and Science, while also paying attention to skills such as ‘Habits of Mind’ and Social Emotional Learning. The faculty then designs an authentic assessment that demonstrates the key skills and content in an engaging and meaningful fashion. In these phases, we must pay attention to what the other bands are covering in terms
of content, Vital Questions, and authentic assessments so as not to be repetitive or to leave gaps in the overall curriculum. Ultimately, each project must end with a period of reflection for the students as the final way to process the material.

We also use our overall faculty development to aid us in developing this curriculum. We have brought the entire faculty to the Learning and the Brain conference in order to get us all organized around the same central ideas and to see the centrality of developing social emotional learning, to understand the importance of development, and to make sure what we are doing is in line with best practices. The resulting research has been utilized in discussions regarding our curriculum.

**ii. Who is responsible for assessing your area of the program?**

Band Level Teams and Human Ecology teachers assess Human Ecology. Band Level Teams create and deliver the Human Ecology curriculum, ensure the curriculum matches the developmental stages we have identified, ensure the major understandings are met, and ensure there is no undue overlap or omission of essential topics. Chris and Harry ultimately work with the entire staff to assess, develop, and improve our ability to deliver Human Ecology.

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

One of the first changes we made was to start calling Human Ecology Human Ecology. Originally, this period of time was called Project time. We realized that was a description of how they were working, not what they were working on. We then began calling it Human Ecology Block, which the students shortened to pronounce as one word, ‘heb’. So, we removed the word block, and now simply call it Human Ecology. This may sound semantic and silly, but we recognized that the students were not understanding the centrality of the ideas within our mission. Now, we have students consistently and daily referring to Human Ecology, which feels more appropriate.

We have fully embraced our four bands, initiating our Senior Institute over the last two years, which has the seniors in an autonomous group. We did this so that we can fully live our observation that the seniors are in a different developmental place and at a different stage in their education. The seniors have a different Human Ecology course and also craft an Independent Trimester (the final trimester of their senior year) that culminates their work in Human Ecology.

We continue to move to having autonomous teaching teams assigned to each band. In other words, each band will have four teachers who cover all of the disciplines. We have been able to have this structure for two years, in different bands, but not consistently in all of the bands, or consistent in each band over multiple years. This has been due to budget reasons, which has been tied to our student numbers (we are still growing toward our model of ~105 students).
We started calling Human Ecology Human Ecology. This may sound semantic and silly, but we recognized that we had not committed to this in some of our language. We now refer to this time in our schedule, both in writing and also in speaking, as Human Ecology (as opposed to Project Time, or HEB [Human Ecology Block]).

**iv. What are the future initiatives for your program?**
The Sage School is currently the only program in the country that is fully dedicated to adolescents and human ecology across all of its grades. Our intention is to further refine and define what this means and why it is important.

We are exploring ways to measure the impact of this education across seven years of school and during a time of critical identity construction. We want to know what impact our programs have on our students’ outlooks, relationships, and involvements in their communities.

d. **What are the strengths and recommended areas of growth for your area of the program?**
The major strength of Human Ecology is that it is a central pedagogical framework that enables us to fully deliver on our mission. It enables an authentic curriculum, and is a natural means of engaging students in a sense of place, community responsibility, and in developing self-awareness.

Human Ecology enables students to see important topics of the world as integrated systems of overlapping disciplines. Students get to dive deeply into different areas over the course of each trimester and over the course of seven years. Human Ecology is not simply a class, but our central organizing principle. We hear this frequently from our graduates, as they write essays for college that refer to how the school has changed their thinking and way of life, we hear it when potential faculty are interviewed by our students, who speak eloquently of the impact of the school and its way of teaching on their development, we hear it in our closing circles of our Winter Field Studies excursion when the whole student body discusses the value of the school, and visitors hear it from our current students consistently. Sage students think in a more holistic, integrated, systems-design style than other students. We look forward to the day when we are hearing that, as our numbers grow, from colleges, and from other outside forces.

Our biggest opportunity for growth is in demonstrating the efficacy of this program and educating our students, families, and community about the importance of Human Ecology: What is it? Why do we do it? Why is it critical?

We have spent the previous 7 years simply developing our structure. The next step, in the next 7 years, is to articulate more clearly the skills, content, and standards for each project. The challenge will be, as it is right now, to articulate enough of a framework to provide guidance to new teachers, traditions of learning to students, and clarity of standards to all without boxing teachers in so much that all creative novelty is lost.
Another area of growth in the coming years is to clarify the process to change the curriculum. What can be changed? What must remain? Why? Currently, we have some guidelines, but they are up to some level of interpretation, and need clarity. We have discussed creating, as the book *Originals* suggests, a committee of people who are doing the creative work to evaluate any creative changes. It would be a committee of lead teachers, experienced Sage teachers, and the Head of Curriculum. The idea is to present to a broader gathering of Sage teachers, so it does not rely on simply one or two teachers interpretations of the curriculum.

We are also working to define which of our Human Ecology credits can be counted, for college purposes, as a Lab Course. Currently, our students gain many hands-on experiences in the Greenhouse and in Field Studies, but we do not have what might traditionally be called a Lab. Clarifying this distinction requires further thought.
Question 25: Each of the school’s educational program components is effectively designed and implemented: WRITING & LITERACY

a. What are the goals for your program area?

Finding one’s voice through writing in a variety of formats to a variety of audiences is a primary goal of our Writing & Literacy curriculum. Whether through storytelling, sharing with peers, explaining opinions in op-ed pieces, or engaging in variously structured class discussions, Writing & Literacy class is an avenue for students to refine their own voice and acknowledge the validity of their peers' voices. This goal aligns with the mission of developing social and emotional skills, self awareness, and community responsibility.

Another goal of the program is to use writing and the analysis of literature as a means for self-reflection, the development of self-awareness, and an understanding of one’s place in the community and larger world. Through small and large group discourse as well as individual assignments, students practice questioning, conversation, and identifying rhetorical strategies.

An additional goal is using the content of Writing and Literature to supplement our study of Human Ecology. This includes tying themes of literature to the overarching themes of Human Ecology at each band level as well as engaging in writing assignments geared towards exploring a deeper understanding of those themes. One of Human Ecology’s goals is to have students learn the interdisciplinary nature of content in the world, and the connections between Human Ecology and Writing supplement that goal. Writing is an expression of a particular group of humans at a particular point in history and in relation to a specific environment and can help us understand those views, those times, and those environments.

Other goals include developing students’ ability to: communicate ideas effectively; extract main ideas from a variety of mediums; engage, find value in, and develop proficiency in the writing process; hone the academic skills of grammar, mechanics, and usage; practice writing from different perspectives; consider audience, tone, and purpose; exercise imagination; explore figurative language; refine voice through creative non-fiction and introductions to expository writing; take a stance through analytical writing by identifying and implementing rhetorical strategies; develop an appreciation for purposeful sentence structure and word choice; analyze literary elements through small and large group discussions; and instill an appreciation for the intricacies of the written word. These goals aid in the development of academic, cognitive, social and emotional skills.

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

To develop our curriculum, we refer to the Common Core, Columbia Teachers College Writing benchmarks, and Educational Records Bureau standards. However, these benchmarks are not what determine our curriculum. Our school’s understanding of distinct stages of adolescence ultimately guides the choices of which skills and subjects to introduce in Writing & Literacy class. As our Explorers in the 6/7 band first become aware of their own internal voices, they work to delve into their interiority and imagination through writing and literature. Our Social Animals in the 8/9 band explore ecological and social relationships. The Local Apprentices in the 10/11 band learn...
analytical tools and strategies that allow them to access and respond to the world around
them. In their senior year, our Global Citizens study books and write on topics that
address the validity and complexity of the perspectives of differing philosophies,
ethnicities, and nationalities. The benchmarks of adolescence are what determine our
curriculum in Writing & Literacy.

c. What is the process for making changes within your area of the program?
   i. What research and information is utilized?
      Our writing curriculum responds to the needs of each group of students, as well as
to the individual development of each student’s skills. Our careful observation of a
group of students’ overall ability to write and communicate helps us determine
what skills the group should work to develop. Frequent writing and feedback to
individuals provides structure for each individual student’s skill development.
Through assessing regular feedback we give on papers as well as evaluating the
formal written feedback we provide to students and parents five times each year,
we work to determine which changes we need to make within the Writing &
Literacy program.

While our personal evaluation is valuable in determining the changes we want to
make within our own curriculum, discussion with the other writing teachers and
the curriculum coordinator also provides us with information about if and how we
should change our program. We also consult literature on the changing nature of
language, literacy, writing, and education (e.g. Purdue’s Online Writing Lab,
Steven Pinker’s The Sense of Style, David Orr’s Earth in Mind, Sherry
Turkle’s Reclaiming Conversation: The Power of Talk in a Digital Age,
Anne Lamott’s Bird by Bird, and Stephen King’s On Writing)

ii. Who is responsible for assessing your area of the program?
   There are three main tiers of assessment within the school for Writing & Literacy.
   First, all Writing & Literacy teachers are in conversation about the efficacy of the
program overall, as well as the goals, strengths, and weaknesses of individual
projects. Because of the band structure of our school and the integrated nature of
Writing & Literacy and Human Ecology, band teachers also assess the program
within their age group continually. The curriculum coordinator also oversees and
helps assess the program. Outside of the school, our students take PSAT 8/9,
PSAT, SAT, and ACT, which all assess certain aspects of student capacity in
Writing & Literacy.

iii. What programmatic changes have taken place in the past five years?
   Why?
   In the past five years, we have balanced the amount of fiction and nonfiction
literature that students read so that they build comfort in understanding a greater
variety of written genres and use them as mentor texts for improving their writing
skills. We have also continued to build creative writing skills, and exposed students
to writing structure and expository writing at a younger age so that they are better
prepared to interpret and create effective analytical writing. We continually adapt
the Writing & Literacy program so that students can make clear and meaningful connections to the Human Ecology program.

iv. What are the future initiatives for your program?
Ensuring a cohesive 6th-12th grade Writing & Literacy program so that students leave our school with solid written and verbal communication skills is our main goal for the future. We are working to increase the number of authentic assessments (e.g. installing student writing in a gallery, writing for National History Day) we use within our program so that students’ work can be more widely read and so that students can continually see the importance of crafting quality work. We also want students to have more access and contact with those who write professionally so that they can see the relevancy of developing these skills. The school provides, and we will be taking advantage of, professional development opportunities for staff develop our skills as Writing & Literacy teachers.

d. What are the strengths and recommended areas of growth for your area of the program?
The strengths of our program lie in our ability to respond to our students’ developmental needs. Beginning with our youngest students and continuing through the senior class, teachers emphasize the importance of the writing process, which includes: drafting, editing, revising, and publishing for authentic audiences (i.e. not simply their peers and teachers). Our students are strong creative writers who use the genre to both respond critically to literature and express their inner emotional world. Lastly, students frequently share their writing with one another in order to revise and reflect, and publish work for authentic audiences.

Our standardized test scores and feedback from students going on to college has all been very positive in regards to our Writing & Literacy program. In 2015, for instance, the ‘college readiness’ benchmark for the PSATs for 10th graders was 360, and for 11th graders was 390. Our average was 490 and 573, respectively, and not one student scored below the benchmark. Our SAT average of seniors that year was 572 in Reading (73rd percentile) and 539 in Writing (68th percentile). We had one student score a perfect score on their writing ACT.

Moving forward, we recognize the importance of solidifying our students’ grammar and mechanical skills, developing their use of citations and understanding of plagiarism, organizing expository writing with a strong analytical structure, increasing vocabulary and reading comprehension of dense texts, and exposing students to diverse mediums (books, articles, podcasts, movies, etc). Continued conversation across bands to ensure consistent and proper development of skills is also needed.
Question 25: Each of the school’s educational program components is effectively designed and implemented: SPANISH

a. What are the goals for your program area?
The Spanish department goal is to comprehensively implement the Organic World Language (OWL) method so that our students truly acquire the language. We expect an acceptable progression through the American Council on the Teaching of Foreign Languages (ACTFL) proficiency levels, starting with Novice Low and progressing (for an average student) to Intermediate Mid. While it is possible that some students progress as far as Advanced Low, we consider Intermediate Low as a minimum achievement level for a student here from 6th through 12th grade. Our goal is to prepare our students for real-life situations where they take advantage of opportunities to use their proficiency. We define proficiency, as ACTFL does, as the ability to communicate meaningful information in a spontaneous interaction in an appropriate and acceptable way to native speakers of Spanish. An additional goal is to foster student’s self-motivation and desire to learn through creating a student-centered curriculum that inspires learning through socially driven activities.

b. What, if any, curriculum and/or developmental benchmarks does your program use?
Spanish students are evaluated and placed at a level on the ACTFL language scale two to three times per school year. Upon entry into the school, students take an initial evaluation that demonstrates their baseline knowledge in Spanish. Students gauge growth in Spanish by comparing their current ACTFL level (indicated on trimester reports mailed home), to previous evaluations. While teachers encourage students to move at their own pace (provided they participate and push themselves to grow), they are generally expected to move up one level per school year (i.e. Novice Low to Novice Mid). However, as students progress to higher language levels, it is reasonable to move up at a slower pace.

Additionally, the Spanish Department utilizes outside authentic assessments such as Assessment of Performance towards Proficiency in Languages (AAPPL) and Oral Proficiency Interview (OPI/OPIc) to assess students’ language levels at the culmination of their 9th grade and 11th grade years. Students can use these objective, third-party assessments to report their ACTFL levels on college applications and as placement when they enter college-level classes.

Spanish teachers incorporate ideas, topics, and concepts from Human Ecology as much as is practical, such as discussing the features of adolescence and gender differences in the 8/9 band, discussing food during an agriculture unit in 10/11, and discussion of superheroes in 6/7 as they study the Hero’s Journey. These are ways that the Spanish curriculum is linked to other courses and pegged to students' developmental stages.

c. What is the process for making changes within your area of the program?
   i. What research and information is utilized?
The Spanish department relies upon research on second-language acquisition both at the formal and informal levels. Formally, our extensive and ongoing training in the OWL program with its founder, Darcy Rogers, has given us access to much recent research such as Merrill Swain's output hypothesis and Krashen's
Comprehension Hypothesis. Informally, as educators we constantly examine our classroom strategies and activities and determine their effectiveness by students’ response and by students' growth in skills and confidence. Anecdotally, we have noticed a huge improvement in both language skills and student engagement since switching to the OWL method.

**ii. Who is responsible for assessing your area of the program?**

The principal responsibility for assessing the Spanish department falls upon the Spanish faculty. As high-level speakers of the language they are in a unique position to assess the effectiveness of their classrooms. However, our professional development activities, including cross-department classroom visits, mean that other faculty members (from math teachers to the Head of School) routinely visit our classrooms and offer feedback and assessment. We have weekly Spanish Department meetings to facilitate consistent communication regarding our program and make changes as needed. We hope to partner with another school doing OWL methodology.

In October of 2015, the Spanish department attended a two-day training on the Oral Proficiency Interview (OPI), one of the main assessment diagnostics available through ACTFL. This assists us in more accurately determining our students' levels and how best to help them progress to the next level. We have more professional development funds to use in 2016-17 that will increase our skills in administering these diagnostics.

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

In the spring of 2013, the Spanish department attended a two-day workshop and training in OWL, and decided immediately to adopt it as our methodology for all Spanish classes at The Sage School. This represented a huge shift in our approach and techniques, such as eliminating all English usage from the classroom, providing each student a notebook in which almost all work would be done and stored, and making the classroom setting much more conducive to interaction and kinesthetic learning by removing or moving furniture.

Previous to committing to OWL, The Sage School’s Spanish program was not strong at all. In fact, if you review our early alumni’s surveys, they rate Spanish quite low. Due to the staffing constraints of the first two years, we relied largely on Rosetta Stone as our primary method of teaching Spanish. It was passive, required little of the students, and we did not have sufficiently skilled teachers to commit to much else. We then shifted to one teacher, Nathan Kolar, instructing all levels of students in Spanish, but he had little support or resources. As we learned about OWL, The Sage School committed to it fully. It matched our underlying beliefs about how students learn, it was experiential and hands on, and seemed to be a perfect ‘fit’ to our program. After a few years of implementing the program, we still conclude that the ‘fit’ remains perfect.
We made this shift because OWL promised to be a much more effective teaching method. It has proven to be so. We thought our students would be more engaged in class, progress faster in their skills, and that it would become a more active and fun atmosphere. In each of these areas we have seen the improvement that we anticipated. We have also added a Spanish teacher to every band level to ensure the strength of the program.

In the fall of 2015, we hosted Darcy Rogers, founder and of the OWL Program, for a one-day workshop in which we check back in with her and our goals from our last workshop, and delve deeper into areas of need like authentic literacy and assessment. This has helped us strengthen and develop the program more effectively.

**iv. What are the future initiatives for your program?**

We will continue taking our seniors to Ecuador as an authentic assessment of their language skills. We will also continue to administer a nationally standardized language assessment (OPIc) to 9th and 11th graders in order to communicate our students’ achievements most effectively to colleges. This data will allow us to track student progress more effectively over time, a goal we are working to achieve.

We will continue to collect and analyze the data we create from our assessments of our students. Our past data are somewhat compromised by the fact that our evaluation abilities have improved vastly since we began assigning levels and the fact that we will not have had any student in an OWL classroom from 6th through 12th grade until 2020.

We also plan to separate our level assessments for writing and speaking, both because those skills can progress at different paces as well as to acknowledge a student who might be stronger in one area or another. We are planning to host a modified two-day OPI training to help us achieve this goal.

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

Our students gain a level of comfort and confidence in speaking Spanish that does not typically come from traditional grammar classes. Students frequently comment that they will speak more Spanish in their first few weeks of Sage than they have in years of traditional classroom instructions. Students of various levels can collaborate and support each other within one classroom. For a new program, our students are truly immersed in the language and it has been an effective implementation of the OWL methodology. An overall strength has to be simply our commitment, transition, and implementation of the OWL program. Student engagement, parent satisfaction, and our abilities to challenge students at multiple levels have all increased. All Spanish faculty are equally committed and experienced with OWL methodology, providing consistency to students moving through different band levels. We consider these to be our strengths.
We hope to continue training faculty on OWL methodology and assessment. We believe we have the potential of being an ‘Exemplar Site’ for the OWL program. We would like to improve and increase connections to community and opportunities for authentic practice with native speakers in the area. We further hope, now that we have students who are staying from 6th through 12th grade, to have more students scoring higher on the ACTFL scale, thereby producing more students capable of entering college at a higher level and/or being more ready for more active Spanish speaking in their lives- in their neighborhoods or while traveling.
Question 25: Each of the school’s educational program components is effectively designed and implemented: MATH

a. What are the goals for your program area?
Our math program is designed to create well-rounded, effective math students who proactively engage with math in everyday life. We encourage students to become independent, motivated learners in the subject. Our foundational goals stand on the goal that each student achieves at least an age-appropriate level of numeracy and problem solving skills, while also developing their skills as note-takers, their ability to read and comprehend math problems, and their ability to converse with students and adults about mathematical problems and challenges.

We hold preparing students for standardized college entrance tests as a significant goal of our program. We integrate certain math skills into the Human Ecology curriculum (6/7 understanding scale as they construct ancient buildings, for instance), however, we have found that schools that attempt to integrate all math skills struggle to prepare students adequately at the higher levels. Our ultimate goal, then, is to help students be able to use and see the applications of math to our daily life while also keeping student’s options open for rigorous college admissions and future mathematical pursuits for those that it interests.

It seems appropriate here to discuss how ALEKS helps us meet these goals, as well as why the school as adopted the ALEKS program overall. As a small school, meeting the demands of multiple levels of math in any one age span can be a challenge, and it was no different for us. By adopting ALEKS, we quickly had a structure where students could get challenged at a level appropriate to them, where other students could work together and help each other (thus expanding the numbers of ‘teachers’ in the room and challenging their communication skills), and both the students and the school could be ‘freed’ from mandating all students progress at the same pace and all students be scheduled at the same time. As we watched and evaluated the program, we found frequent mathematical conversations between students, we found that the higher levels of students could proceed quickly through redundant materials, and we found that lower end students could get remediation without the social stigma that often accompanies it. In short, the ability of students to develop at their own pace seemed to ‘fit’ clearly within our mission and allowed for a broad cross section of students to succeed.

b. What, if any, curriculum and/or developmental benchmarks does your program use?
Our benchmarks are aligned with and go beyond those connected to the ALEKS math learning program. We use the course delineation on the ALEKS program to determine when students advance, but we have also altered some of the curricula within the program to better fit our ideas of what students need to practice. For example, we have removed some of the redundancies that existed between courses within the program.

The ALEKS program breaks each subject down into a number of topics, and requires mastery of each topic before the student can progress. ALEKS defines mastery as the point when a student completes a topic lesson and then also demonstrates understanding of that information by correctly answering a problem in a test. We also use standardized test scores (PSAT 8/9, PSAT, and SAT) as an external evaluation of our students’ math
abilities in comparison to national averages. We have found that our averages have been, over the past few years, comparable to or better than state and national averages.

c. What is the process for making changes within your area of the program?
   i. What research and information is utilized?
   We get a lot of face time with our students, so we get to know their personalities very well. We have a high teacher to student ratio in math class (typically two teachers in a 13 student class), so we work with students one-on-one on a regular basis. These in-class interactions allow teachers to analyze students’ learning styles, study habits and productivity. We use quantitative data from ALEKS to help analyze and evaluate the efficacy of our math program. This quantitative data includes how much time a student spends in the program, what topics they have attempted and if they answered the questions correctly. This information allows us to identify students who need extra help. We also assess our program via standardized test scores and our students’ ability to apply math in hands-on projects. We have set up a real world math class period every Friday called Math Superblock, where students are grouped by abilities and are faced with a trimester-long project to complete. The geometry students design a house while the algebra students put together a business plan for a restaurant they run for a day.

   ii. Who is responsible for assessing your area of the program?
   Each teacher is responsible for maintaining their students’ individual portfolios; they analyze available data like learning rates, assessment results, and working time to understand student work habits, written math work and notes, confidence in tackling math problems, enthusiasm in class and overall growth. As a math faculty, we use the data from ALEKS, classroom productivity, parent feedback, standardized test scores, administrator feedback and group discussions to analyze the math program and make targeted changes. A Lead Math Teacher, Maggie Blatz, tends to the overall program, and works in conjunction with the Head of Curriculum, Head of School, and College Counselor to talk about how we are developing students for the future.

   iii. What programmatic changes have taken place in the past five years? Why?
   We have gone through a couple of major programmatic changes in the past five years, although the basic structure has remained similar. We have re-assessed our math courses and shifted some of the required topics for certain courses. We have optimized each course and created what we think is a more appropriate curriculum for each course. We have sought to get more teachers in each math class, moving from 1 to 2 per class of 15 students, in order to increase individual attention. We have also added the previously mentioned “Math Superblock” where students meet with other students who are in their same math course in order to partake in a teacher-designed, trimester long project. We implemented this component to expose students to math applications outside the ALEKS program and introduce variety to the math program.
iv. What are the future initiatives for your program?

Our program hopes to expand further our “Math Superblock,” which encourages students to connect math to applicable situations. On the ground, this means further designing these trimester-long projects and then revisiting them from year to year. We would also like to incorporate benchmarks into the math projects to ensure students are improving in their ability to apply math to real world problems and becoming more confident mathematicians.

Our future program will open up to elective courses once students have completed Algebra 2. We plan to further solidify and expand the choices that are available to those students, so that they have more options in continuing their math education.

As teachers, we want to continue to create and manage dynamic math classrooms where students are efficiently and effectively learning and practicing math. We also want to continue to foster a math culture where students are creating strong note taking skills and investing time in peer-to-peer teaching and learning. We would like to spend more time having students identify their personal learning styles, so they can find strategies that are effective for them when they are challenged. We want to expand our student resources through creating video lessons that students can access from home and the classroom.

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

Our blended math approach consists of one-on-one instruction, online ALEKS curricula, peer teaching, and project-based mathematical application. This multi-faceted approach has many strengths. Firstly, our classroom is student-centered, meaning that the students choose the material and actively figure out for themselves how to work through content. This discovery-based learning approach enhances retention and gives students a sense of ownership over their work. Students are assessed about once every two weeks and only progress to more difficult material once they demonstrate understanding of the prerequisite concepts. This approach helps build a solid mathematical foundation and assures student understanding is solid, and long-term. Students move through material at their own paces and aren’t left behind if their peers pick up concepts more quickly, nor are they bored if their peers need more time. Also, we emphasize effective and efficient note-taking skills in the math classroom. Students learn to extract critical information from a math explanation and copy it into their notebook (their personal “math textbook”) in a way that makes sense to them.

Data from ALEKS and classroom interactions with our low student teacher ratio allows teachers to track students’ individual portfolios, identify students who need extra help and prevent students from falling through the cracks. Also, the majority of teachers’ time in the classroom is spent instructing one-on-one, which gives teachers an unfiltered perspective on each student’s learning style and immediate feedback on comprehension and retention.
We have identified several areas for growth within the math program. Firstly, with our current system, students choose what to work on from a wide spectrum of math content. For example, a student might work on simplifying an inequality for ten minutes and then jump to calculating the volume of a cylinder. Their movement through the material can obscure the connections between the concepts. We hope to address this issue by using mini-lessons in small groups to present a larger perspective.

We allow students to use their notebooks during assessments because we want to encourage understanding and problem solving, rather than rote memorization of formulas and math facts. While this testing approach works well within our program, we would like to amend this system to one that balances more familiarity with traditional standardized testing styles. We would like to give students more practice with the standardized testing format and give them practice test taking without notes and with time pressure.

We would also like to expand our note-taking curriculum. This includes further development and emphasis on note taking in math and continued instruction on how best to identify and extract key information from explanations.

As we have more graduates in more college programs, we would like better information about how ALEKS has prepared them for the rigors of college.
**Question 25:** Each of the school’s educational program components is effectively designed and implemented: **FIELD STUDIES**

*a. What are the goals for your program area?*

The goals of the Field Studies Program are to help bond our community, to help develop leadership opportunities (self management and group dynamics), to extend our academic program into the field, and to develop educational opportunities that pay attention to place by using our extended classroom of 300 miles. Ultimately, Field Studies strengthens our ability to meet our mission in a way that few other programs could. Our Field Studies program focuses less on outdoor skills, and more on generating wonder and curiosity in the natural world, growing our community, and developing a sense of place in our corner of the Intermountain West. The Field Studies Program accounts for five weeks of our school year: the first two weeks of the year, a week in the middle of the winter, and two weeks at the end of the school year.

Community bonding and development is vital to the structure of our school. From the ropes course work at the 6/7 band level to the senior capstone in Ecuador, the program aims to draw our community together through a series of experiences, challenges, and opportunities that build trust, and attend to the social, emotional, and cognitive dynamics of each group.

Leadership develops organically throughout the lower bands, and then more intentionally as students move through 10, 11, and 12. In 6/7, for example, students do ropes courses, and small climbs, and are asked to belay and support their classmates. They are involved in menu planning and basic trip logistics. By senior year, students construct their fall Field Study- from general destination and goals, to route planning, to menu and field logistics. The theme of this fall Field Study is leadership- not just of the trip, but also of their coming school year.

We extend our academic program onto the road by creating curriculum for the field study that connects directly to the developmentally appropriate curriculum of each band each year. Inherent in this is building educational experiences and content. For example, our Explorers in the 6/7 go on trips that expose students to historical examples of explorers of the past from The Oregon Trail to Lewis and Clark. The 8/9 are our Social Animals, so their trips expose students to different social justice and environmental justice topics from the rock and roll movement in San Francisco to the impacts of dams on the salmon populations of the west. The 10/11 are our Local Apprentices, so their curriculum centers on the systems that define our area. Their field studies range from comparing local industrial and small scale farming operations to backpacking through The Sawtooth Wilderness. All Field Studies build unique experiences that enhance the curricular objectives of the year.

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

We develop all curriculum for the field study with the same adolescent development principles that guide our Human Ecology curriculum. The Field Studies curriculum develops in concert with and as an extension of our Human Ecology curriculum. The curricula for these programs contain content and contextual understanding that the
students will see throughout the year in Human Ecology. For example, the 10/11 fall Field Study during the year on American Systems is a backpacking trip that integrates a physical experience in the wilderness, outdoor education skills, and exposure to a uniquely American landscape. The Field Studies experience is firmly rooted in what is developmentally and curricularly appropriate.

c. What is the process for making changes within your area of the program?
All changes to the Field Studies program are done through a review process with the team teachers in Human Ecology for a given band level and The Curriculum Coordinator. The goal with this level of review is to ensure that the principles explained above (that the program is curricularly and developmentally appropriate) are upheld.

i. What research and information is utilized?
One of the major goals of the Field Studies program is to expose students to concepts, places, and issues that are important to our region. In order to ensure that our Field Studies accomplish this, it is important that the faculty groups who design each trip are current on the issues and the available resources of the area. The process of designing these trips is generally a mix of research through web searches and phone calls, and personal connections and knowledge. Many of the faculty members spend personal time in the areas that our trips visit, understand the natural and political systems of the West, and are up to date on the topics of debate relating to this region.

ii. Who is responsible for assessing your area of the program?
There are two general levels of assessment: an administrative level and a band level. The administrative level is comprised of faculty members in each band, and offers the meta-level analysis and assessment of the program. This group focuses on the overall program, its strengths, its weaknesses, its goals, and its implementation.

The second level of assessment happens with band level teams. These teams (the 6/7, the 8/9, the 10/11, and the 12) are in charge of constructing, implementing, and analyzing their Field Studies. Each band level chooses its specific Field Studies, develops all of the logistics surrounding them, then assesses the effectiveness of the Field Study. This assessment happens during and directly after the program, as well as over the course of the year (in the case of Fall Field Study).

iii. What programmatic changes have taken place in the past five years? Why?
In one sense, there have been no major programmatic changes. The goals of the Field Studies program have remained the same; however, the expression of those goals through the creation of trip itineraries have adapted to center on the most regionally, politically, and environmentally relevant and current topics.

We have changed what we do in the field to meet these goals. For example, the 8/9 band, when studying Social Systems, traveled to San Francisco to study rock and roll and the social cauldron that was San Francisco in the 1960s. After that
trip, we realized the power of the experience and are now seeking to implement a similar trip every two years. We amend and adapt our field experiences based on local and regional issues and opportunities, and also to implement the goals and vision of the school. In the last five years, we have fully implemented our Senior Institute, which resulted in a whole new leadership training Field Study for this group.

We will continue to adapt, refine, and change what we do to meet the overall program goals.

**iv. What are the future initiatives for your program?**

Our hope is to adapt our itineraries as needed in order to meet our goals and vision: to explore and deeply understand our place and this region of the West. An example of a future initiative came out of the 2015 Fall Field Study for the 8/9. This group, in the year of Understanding Natural Systems, explores Western Forest Ecology. Two key elements of Western Forest Ecology in our area are fires and anadromous fish (salmon and lamprey). We did an extended study of the four Lower Snake River Dams the past two times we ran this curriculum. Next time we run it, we will recreate the migration of the fish from the mouth of the Columbia back to the Salmon River’s headwaters. We plan to do this over 8-10 days, visiting all eight major dams, and ending our journey in our backyard. We will implement other changes as appropriate.

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

The strengths of our Field Studies program stem from the time that we invest in them as a school, and the value we place in them. Students who experience the entirety of our program will spend nearly a full school year in the field before they graduate.

In the fall component of our Field Studies program, the faculty and students spend two entire weeks cooking, eating, living, and learning together in an environment that challenges everybody in their own ways. This facilitates the development of foundational relationships between students and faculty, students and students, and faculty and faculty. This time spent in the field equates to about 100 hours of contact time between faculty and students before any time is spent in the classroom. This means that new faculty and students are approaching their academic year at the end of the trips with less trepidation about how they will form relationships with their teachers and peers.

Going into the field at the beginning of a new school year also allows teachers to introduce the year’s material in a unique way that promotes strong connections through memories linked to place. Having these lasting connections helps students maintain an understanding of the overarching goals of the year’s curriculum and allows them to refer back to that throughout the year. Without these foundational connections, students have a harder time understanding the relevance of the curriculum.

The winter component of our program offers an opportunity for the school to be removed from our campus and to revisit the community goals established at the
beginning of the year. Given the student involvement in winter sports that are not associated with our school, this trip comes at a time when students’ focus can begin to drift, and relationships within the school community can be neglected. Beyond the curricular benefits, this trip breathes energy back into our community, and helps students to bring motivation back into their work.

Our spring Field Studies program is an important punctuation on the year both curricularly and from a community standpoint. This is the final time the band is together and serves as a place to reflect on the challenges and growths that each student has experienced throughout the year. This time provides opportunities to make closing connections within the academic material, and for students to begin to molt into the next stage of their academic journeys.

Our Field Studies Audit for the self-study highlighted several areas of growth for our program that we are considering if and how to implement. The full document can be viewed, as it is included with your review materials. Below are some of the major recommendations and our responses. The text is literally cut and paste from the review, so the dates it refers to are from the perspective of spring 2016, however, we have added updates in parentheses after our initial response, to clarify for the self study.

➢ Overall Program Recommendations
   ○ “The school should look into recording when students miss more than half a day of programming”
     The Sage School records student absences on a daily basis. Our student data management system is a FileMaker-based program that was custom-created for the school. We enter daily attendance each morning and differentiate among reasons for tardies and absences. Half-day absences are also recorded and determined based on a sign-in/sign-out sheet at the front office. When students are not in class and their parents have not notified the school, the Office Manager calls the family to confirm student whereabouts. Any student leaving school early must have a parent sign them out or notify the school by phone or email to excuse the early departure. Trends of continual absences trigger intervention, which will typically occur in the form of a family meeting to address the issue.

   ○ “When a student returns to school from social-emotional/mental health event or a therapeutic program, the school should consider developing a Safety plan for those students”
     We have done this with students who have returned from therapeutic programs or health events. Our process has been to meet with the student’s teachers, the Assistant Head or the Head of the School, and the parents in order to develop a plan. We have typically identified a staff member that the student feels close to provide check-ins and monitoring. We have worked students’ therapists and doctors as necessary. The recommendation you provided calls for a written sign-off. We have not consistently committed these plans to writing with all parties’ signatures depending on the severity of the event, but it is a change we could implement.

   ○ “We suggest this policy (of teacher’s children on field studies) is continually reviewed.”
The questions you suggest we consider to help determine whether a child is a distraction on a trip make sense, and are questions that have guided us in the past. We will transpose these questions into our Faculty Handbook as clear guidelines.

○ “A thoughtful review of wellness activities could help prevent student injuries”
While separate from our Field Studies program, daily Wellness activities occur as part of our curriculum. These activities are by design physically engaging and include a variety of games. Teachers consider the safety of the play area and designate boundaries. Wellness activities may be moved indoors, either on-campus or at a local community gymnasium, when adverse conditions exist.

Injuries that occur to students during wellness are recorded on our Incident Report form. Significant injuries, such as those resulting in concussions, sprains, abrasions, or breaks are reviewed during subsequent faculty meetings to identify what measures, if any, could have been implemented to avoid the injury. We make the necessary changes to mitigate future risk.

Despite mitigations, most of the minor, playground-type injuries that occur have been the result of rigorous and exuberant play and may not have solutions that can be controlled by staff, short of not allowing students to play at all. Some students are simply more competitive and/or physically engaged than others and are typically the ones that suffer injuries as a result.

➢ Field Studies Program Recommendations
○ “Great gains could be made by thoughtfully aligning institutional risk tolerance and a common risk management philosophy across bands.”
The first page of our Risk Management Manual lists our overall philosophy: A fundamental principle of The Sage School is that our students are safe when they are in our care. While we cannot remove all risks, we can manage risk as responsibly as possible, and we can create an environment both inside of school, and wherever we take our students, that attends to their safety, health, and security. The foundation of our school is to have an educational environment that allows students to experience their education. To allow this culture to be vibrant and constructive for all students and staff, we try to create a culture that mitigates risk where and when possible. The aim of this manual is to provide guidelines for school operations that will help foster the culture of The Sage School in a manner that will protect our students, the school, and the faculty. Our statement came from researching other groups that manage risk. NOLS’ introduction and philosophy includes a similar statement:
Risk Management Goals
1. To prevent fatalities, disabling or disfiguring injuries and serious illness.
2. To reduce all injuries and illnesses.
3. To anticipate emergency response and crisis management needs and design suitable protocols and plans
4. To identify the accepted NOLS field practices for managing life threatening risks and hazards and the expectations for their consistent use.
5. To be a leader and resource of wilderness risk management practices and outdoor education curricula.

While goal five is outside of our range and desire, the flavor of our philosophy statement is similar. We are left with some questions: 1. Did you observe differences between bands? We definitely believe there is a difference of what we manage between a 6th grader and a senior, but this is rooted in a developmentally appropriate difference. However, we believe we are approaching risk in a unified fashion. 2. Is our statement of philosophy too general? Is there something specific you see that could be helpful to add?

- “We recommend that you define medical screening protocols based on the level of medical training of your staff and the categories of trips that you facilitate.”

We have reviewed many other institutions screening protocols and have stuck with a more general approach due to the fact that the vast majority of our field operations are front-country and within reasonable driving distance to hospitals. The exceptions are our 10/11 and 12 backpacking trips, Ecuador, and driving periods where we are farther from definitive care. In these instances, we have deferred to individual level training as the guiding force. Most protocols we reviewed seem to include the large disclaimer of “these protocols cannot replace good judgment.” Our default was to begin on that platform.

The Sage School seeks to keep these protocols short enough to be useful, long enough to be effective. Our staff goes through WFA training together every two years (we are beginning that cycle fall 2016). This will recertify our WFRs and keep everyone at current WFA levels. We are also interested in keeping up with the latest levels of training as a staff. At this point, we believe our best approach will be to use the NOLS WMI field guides as our official medical screening protocols. We include them in each medical kit we have. It is our intent to adopt the expert’s manual as our guidelines and base our scenarios and trainings on those guidelines. The school will take responsibility for keeping the latest version of the handbook.

- “Scenario-based staff training should target protocols.”

We run scenario-based trainings in our fall in-service before school begins. This coming fall, we will begin the year with a full-staff WFA training session. We have used various staff meetings during the year to run hypothetical scenarios- covering driving, wellness and field-study specific situations. We also consistently debrief significant events so that all staff can learn and grow from real world experience and be ready for future incidents.

- “One way (to explore cultural competency) would be to connect with the local Latino community.”

This is discussed in more detail later.

- “The Field Studies skills program should be as intentionally addressed as the core curriculum of the program….We recommend you formalize the curriculum and student competency progression for Field Studies skills
that are essential to successful engagement in and out of the classroom learning experiences.”

Although we believe we understand the basis of this recommendation, we do not concur that field skills development should form a separate area of study distinct from other programs. During our trips, camping and backcountry skills are integrated into the experience through faculty planning and guidance. Faculty members advise and assist students with gear and equipment as needed and provide guidance and boundaries surrounding behavior and safety related to the location and the activity. However, field studies introduce the curriculum of the academic year and selected locations and activities centered on that curriculum are the primary focus and purpose of the trip, not necessarily outdoor skills. We believe that field skills develop in tandem with the primary curriculum.

Throughout the course of a student’s Sage experience, they will spend close to 100 days in the field. We believe their field study skills will develop accordingly.

- **“We recommend...A Sage School faculty member to facilitate the Field Studies Program.”**
  
  This is a sound recommendation that we have been discussing. We are planning to implement it in the 2016-2017 school year. Up to this point, we have consciously made the decision to designate a coordinator from each band for the Field Studies program. In these formative years of the school, it made sense for us to coordinate within the bands. Having consistent oversight seems like the right logical step.

(UPDATE: We have identified Matt Leidecker, due to his experience and background, as a prime candidate for this type of leadership. We have put him on various committees as they relate to Field Studies and Risk Management. However, in that this is his first year teaching at Sage, his energies at this point need to be focused on learning classroom protocols. As such, we do not have one faculty member leading Field Studies, and it still remains divided between the bands.)

- **Ecuador as Senior Capstone Recommendations**
  
  - **“We recommend that The Sage School engage more formally in vetting home stays.” “Accepting this level of liability and exposure in the Ecuador program seems out of alignment with the other instances when the school utilizes third party experts.”**

  This point makes sense and helps us see our program from an outsider’s perspective. It seems that this program not entirely congruent with our practice of utilizing third party experts. Harry and Chris vetted the trip in its entirety before we sent students; they made connections and worked with all of the key on-site staff. The hotel owner that made this trip possible had implemented similar trips for colleges. We modeled our trip on similar experiences that she had created. She has worked with us and vetted the home stays. However, we understand that she is not a professional risk-manager.

  We may need some time to respond to this and consider what our best course of action should be. We have discussed the following:
1. Sending one of our teachers early for the trip, or keep him/her in Ecuador after the trip in order to do more work vetting home stays and building relationships.
2. Hiring a more experienced third party group, such as Rustic Pathways, to create a different trip that serves the same function.
3. Canceling the home stay portion of the trip (although this seems least appealing of these options).

We will take the coming year to review these options and come up with a more comprehensive plan.

(UPDATE: Sara Berman is planning to head to Ecuador several days before the students to meet with families for the home stay.)

- “**Students must have an avenue for emergency communication that does not rely solely on the host family.**”
  We implemented this for the 2016 spring trip to Ecuador. We bought simple, prepaid phones for students to use in emergencies. We have, in previous years, had some kids bring their own personal cell phone to home stays for their own comfort, but we have discouraged this because we want students to truly engage the cultural experience and not get distracted by their devices.

- “**We recommend that The Sage School create opportunities to immerse students in the language before the Ecuador trip.**”
  We have discussed this in the past and consciously decided against it. Developmentally, our seniors are our ‘Global Citizens’ and are mere weeks away from leaving their homes for college. This combination makes them ripe for this type of immersion, whereas a younger student has not developed the maturity (we feel) to handle this type of experience. Our immersion-based Spanish curriculum has had students in the older grades working with local Latinos. However, we have reserved full immersion for our Global Citizens.

- Transportation Recommendations
  - “**We recommend that a careful cost benefit analysis drive fleet expansion.**”
    We agree and have begun that analysis.

- Emergency Procedures Recommendations
  - “**We recommend that this query for updated medical information (on permission slips) become more overt, particularly for backcountry or international trips.**”
    Currently, after parents sign permission to participate on the trips, we ask this:
    Have there been any changes to your insurance plans since the Winter Field Study?
    o Yes
    o No
    If yes, please provide the new information:
This seems to be an explicit request, however, it doesn’t explicitly discuss the international nature of the Ecuador trip. The backcountry trips only occur in the first weeks of school, so the insurance information is at its freshest.

- “The school may want to consider acquiring inhalers.”
  This is an excellent suggestion and we will work with local physicians to acquire inhalers and provide faculty training.

- “We recommend that Nancy and Nate attend the Wilderness Risk Management Conference or other relevant trainings.”
  We agree and will look into it for next year.

  (UPDATE: Nancy did attend the conference in the fall of 2016. Nate is no longer working at the school. She brought back many suggestions and we are working to implement them.)

- “We recommend developing a template for distance planning to ensure that Nancy has all logistical details for all the trips.”
  This, too, is an excellent suggestion. We have trips that are run on rotating basis; in these cases we have well-established routes and accommodations and have the information on the location of acute care facilities. However, formalizing a database as we grow our range of locations is an excellent idea and having a template to ensure that each itinerary includes all relevant crisis management plans and emergency response protocols unique to that trip would augment the efficiency of response from the home base.

  (UPDATE: We have begun, although not completed this process.)

- “We recommend that the school develops a redundancy plan for Nancy so that someone else can be a point of contact for Field Studies programs. Additionally, we recommend that all emergency response team members receive training and practice with the on call system.”
  We agree and will work toward this during the summer.

  (UPDATE: We have begun this process, and Nancy is looking to expand its effectiveness in upcoming Field Studies.)

- “Developing an online incident form may make it easier for teachers to fill out and for the Health and Safety Coordinator to track trends.”
  This is another sound suggestion we will consider.

- **Food And Equipment Recommendations**
  - “We recommend that The Sage School work towards outfitting Field Studies Programs with group gear, beginning with those items necessary for the backcountry such as water filters, tents, stoves, and cookware.”
We have already outfitted our group gear (cooking stoves and cookware) for front country trips. We have also written grants to outfit them with other relevant gear—such as binoculars and spotting scopes. We agree that outfitting our 10/11 and 12th grade with backcountry stoves, cookware, and filters makes complete sense, and will make a plan to purchase them for the coming 2016-2017 school year, budget depending.

Tents present a different challenge. We send all of our students out at one time. This means we effectively need to purchase and manage tents for 100 people. The structure of most other outdoor programs tend to stagger trips so as to limit gear use. We have discussed this for our own school; however, in order to create the ‘flow’ of the school year, create some 6-12 community experiences together on the trips (fall field study), and to best access the most likely times of better weather, we send all of our trips out at the same time. Purchasing tents for the entire school will be a significant cost, which may require a grant to fund. It also would require a significant amount of time to manage, cutting into program time. The trade offs for this are significant. We are aware of some of the implications of not having the school purchase tents (inconsistent quality, damage to family-owned tents with no financial recourse) but have decided against purchasing tents presently.

(UPDATE: We did purchase ‘kitchen gear’ for our 10/11 and 12th grade trips—stoves, pots, fuel bottles, and water filters. Curiously, it turns out that renting tents for our backpacking trips is just as, if not more, expensive as purchasing them. We have begun to purchase some tents in limited number for these experiences. At this point, we don’t have plans to purchase enough tents to cover every student on every trip, but are considering those ‘specialty’ trips such as backpacking.)

○ “We recommend incorporating curriculum targeting gear use, management, and maintenance as part of the Field Studies skills progression.”

This was more explicitly addressed above.

○ “We recommend that The Sage School provide a suggested gear list for families to purchase for students per year/band so that families may slowly equip their children for different Field Studies programs and not feel burdened by feeling like they must purchase items all at once.”

This is a reasonable suggestion, and one we actually hadn’t considered. In the early admission packets for the school, and at new parent orientation evening, we can convey this information more explicitly. For the bulk of our trips at 6/7 and 8/9, the list would include sleeping bag and pad, rain gear, and layers of non-cotton clothes. Perhaps we are simply fortunate to live in an area (and have a certain average income of families) where these are standard things for most of our families. The backpacking trip requires distinct gear, but not a lot of it. This suggestion should allow families to purchase gear in a manner that’s less financially burdensome.

**Question 25:** Each of the school’s educational program components is effectively designed and implemented: **COMMUNITY ACTION**
a. What are the goals for your program area?
Goals for Community Action fall under three categories: community relationships, self-awareness, and skill building. Through Community Action, the school plays an active role in the philanthropic community, and students develop a sense of community responsibility. Students engage in meaningful experiences that support the development of sense of place, curricular content, and specific skills. This allows students to interact with other individuals, groups, professionals, and professional organizations with similar missions, goals, and philosophies as The Sage School, and helps students better understand themselves and their value by working with and for others.

b. What, if any, curriculum and/or developmental benchmarks does your program use?
The Sage School uses our collective understanding of identity development in adolescence as a benchmark for establishing the program’s goals. This includes an understanding of the importance of small and large group collaborations, mentorships, exposure to a variety of environmental and social experiences and problem-solving opportunities, as well as developing a sense of community belonging, identity, and value.

Engagement in Community Action projects supports our students’ development of a sense of self, sense of place, and community responsibility and is therefore built into the weekly curriculum as a two-hour block. As students mature and progress through The Sage School curriculum, projects are adjusted to meet developmental needs and goals. For example, in the 6/7 band, larger groups are assigned to pre-defined projects, which helps build a sense of community and purpose while allowing teachers to be in consistent contact with both the class and the non-profit leaders. As students mature, smaller group formats and choice are added in to help develop autonomy. Students in the 10/11 band work to make connections with non-profits, create their own projects, independently seek funding, and execute projects more autonomously. Twelfth grade students design and run their own service projects that last their entire senior year. On the capstone trip to Ecuador, seniors engage in community action projects with local and indigenous groups, enhancing their understanding of global responsibility.

In terms of other benchmarks, we look for progress and development as students move through our program. Students develop the skills to communicate and network effectively with professional adults.

c. What is the process for making changes within your area of the program?
The school assigns a Community Action Coordinator who works directly with local and regional non-profits, communicating to continually assess the impact of student projects and to outline goals and improvements for meeting community needs. The CAD coordinates with a point person from each band at The Sage School, creating the Community Action Team. The CAD communicates with the team electronically on a weekly basis to outline project assignments and to debrief and discuss outcomes. The Community Action Team meets at the beginning and end of the year to evaluate the year’s projects and to set goals and programmatic changes for the future. They also get feedback from the faculty as a whole.
i. What research and information is utilized?
The Sage School utilizes local news outlets, newsletters from valley non-profits and professionals, and parent contacts to stay informed about current needs and projects within our community. We also collaborate with the WOW-Students organization to expand our network. We collect data on the work we do to both quantitatively assess our impact (pounds of food collected, number of hours contributed) and qualitatively assess our impact (feedback from non-profit leaders).

ii. Who is responsible for assessing your area of the program?
Primarily, the Community Action Coordinator and committee members assess the Sage School’s Community Action program. The Coordinator and committee members consider formal feedback in the form of school surveys as well as informal feedback from students, parents, other teachers and non-profits when assessing the program. The success of the program is gauged by a combination of the benefit of the non-profit organization and the quality of student experience. Since the Community Action Coordinator is also a full-time teacher, he/she, along with other teachers evaluate the quality of the experiences of the students. The Community Action Coordinator also communicates regularly with employees of the non-profit organizations to assess the effectiveness and impact of our collaborations.

iii. What programmatic changes have taken place in the past five years? Why?
In the past three years, we have implemented a more structured management system in order to plan, communicate, and implement Community Action projects more smoothly. A shared electronic calendar schedules and tracks weekly projects, which Community Action committee members refer to when coordinating student groups.

The Community Action program has also developed a more cyclical flow over the past years, which allows us to collaborate with different non-profit organizations during specific times of the year. For example, we spend a large part of the fall trimester working with The Hunger Coalition. Working with them throughout the fall is particularly productive and appropriate because we can coordinate events around the harvest, Hunger Awareness Month (October), and Thanksgiving. Establishing seasonal patterns with non-profits has allowed us to streamline planning and to create traditions in our program.

Additionally, our seniors participate in an Independent Community Action program. At the start of the year, seniors choose one non-profit organization to intern with through the entirety of the year. After six years of working with diverse nonprofits throughout the valley, the seniors get to select an organization that is particularly interesting and meaningful to them and collaborate with that organization for two hours each week.

iv. What are the future initiatives for your program?
We would like to implement programmatic changes to enhance students’ awareness of the impact that their work has on their community. An informal study of the nonprofit organizations and continual assessment and restructuring of projects we do with them would aid this process. We have found that meeting with representatives from our partner organizations before the project begins enhances our students’ understanding of the value of their work. We are working to have this pre-meeting be a consistent component of Community Action. In addition, implementing a consistent reflection time each week after Community Action would help give students a broader perspective on the value of their work and time.

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

The strength of our Community Action program lies in the exposure students have to community organizations each week and the sense of responsibility and skills they develop as a result. The relationships we have built and continue to build in our community and beyond are also a testimony to the strength of our program.

Another strength is the sheer ability for us to meet aspects of our mission during the school day. Our mission includes ‘community responsibility’, and we believe that means we need to dedicate time to create that aspect. We watch many schools claim the value of service to the community, but expect students to do it after school, on their own time. By including it on a weekly basis, we see our program as simply making it part of what the kids do, and increasing their ability to see it as habit.

We hope to implement a more established system of reflection, both in small groups and school wide, to help communicate the importance of the work we are doing within our school community. One way to do this would be to display all-school goals and successes publicly within the school. We can also use, and have begun to do so, Community Meeting time on a regular basis to reflect on the actions and impact of our service. This would help make connections for the students, and would foster a sense of accomplishment and provide a source of motivation and pride in the work they are doing.
Question 25: Each of the school’s educational program components is effectively designed and implemented: CREATIVITY WORKSHOP & INDEPENDENT STUDY

a. What are the goals for your program area?

Creativity Workshop and Independent Study are a weekly two-hour period during which students explore various modes of self expression through expanded curricular offerings. Each trimester, students commit to either working in a teacher-designed and led Creativity Workshop or designing their own Independent Study. Building from Google’s concept of “20% Time,” the primary goal of this program is to provide students and teachers with a time during the week to explore topics that interest them, thereby igniting creativity and innovation.

Creativity Workshops are both project and product based. The course offerings have a large range of subject matter inspired by the interests of people within our school and our larger community. It is a time when teachers can design a class on a topic they feel passionate about and for students to pursue new areas of interest with guidance and support. Creativity Workshop allows teachers and students from different bands to cultivate new relationships, thereby strengthening community bonds within the school. We often reach out to professionals in our greater community to provide mentorship and add depth and skills to areas of study. Students’ final products at the end of the term are presented in either a gallery style or formal presentation style to the entire school community and guests from our greater community. These presentations typically consist of a range of musical performances, videos capturing the students’ process over the term, culinary creations, and the various student-made products.

Independent Study allows students to propose a project based on their own interests and passions. This opportunity may find students partnering with professionals or faculty mentors who can help guide their inquiry. Through this option, students explore areas of study that might not be offered within the formal school curriculum and follow their interest in greater depth. Independent Study topics often focus on artistic expression, life skills, and occasionally academic advancement. We have had students who dedicate several trimesters to pursue their passion in art or film or women’s studies, for instance. Students have then leveraged their cumulative experiences in applying to art, film, or liberal arts colleges.

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

We approach the Creativity Workshop and Independent Study program differently with respect to curriculum and developmental benchmarks because the idea was about creating more free space for students to pursue passions and projects. As a result, there are intentionally fewer formalities in this program than others.

For Creativity Workshop, curriculum is typically developed based on individual teacher’s specific skills or interests combined with the understanding of what types of projects would be appealing to adolescents. Glee Club, Digital Video Production, and Yearbook Creation have become annual offerings. Most years, we produce a new curriculum catalogue in the fall faculty meeting days that outlines the courses for the year. Developmental benchmarks for Creativity Workshops are particularly challenging in that...
most classes are open to 6th-11th graders, leaving a wide variety of developmental skills and abilities in each grouping. It is fundamentally up to the teacher to set guidelines appropriate to the group. We require all groups to present their work in front of the entire community on Presentation Day, which helps us encourage and assess quality production; however, the outcome of the product itself is not the only or even the primary basis of passing a Creativity Workshop or Independent Study. Instead, successful passing is determined by the effort, process, and attaining of learning goals.

To initiate an Independent Study, a student receives a packet containing a proposal checklist, a project contract and indemnity waiver, an information letter and sign-off for mentors, a final mentor evaluation form, a final paperwork checklist, and an overall rubric. The packet is the same for 6th graders and 11th graders; however, the expectations for each product adjust accordingly. Independent Study students are also asked to present their products to the entire community on Presentation Day.

Our challenge in this curriculum, like many project-based systems, is to create clear expectations of effort and quality without constraining the freedoms that foster the vitality of the program. Students who have not met the standards for the class will be asked to redo their work until they meet quality and effort thresholds. The teachers set baseline benchmarks for specific workshops, and the presentation requirement motivates project completion.

c. What is the process for making changes within your area of the program?
   i. What research and information is utilized?
   We have made adjustments to the Creativity Workshop/Independent Study program since its inception based on our own observations of what was working well and what needed changing. For example, in the first years of the program, we did not have a Presentation Day, and we were concerned about the overall quality of the products. We specifically implemented the Presentation Day in order to inspire and hold students to a higher standard. We deemed our first years of Independent Study as too independent. We responded to this observation by developing the packet described above to not only provide a basis of evaluation but to convey to students that, although they have considerable freedom, earning credit requires effort, production, self-assessment, and favorable mentor evaluations. We also implemented controls for students leaving campus either on their own, with a mentor, or with other students after evaluating the program from a risk management perspective.

   At the end of each school year, we review what worked and what didn’t in the Creativity Workshop/Independent Study program during faculty meetings and implement changes as warranted to clarify and solidify the intent, implementation, and safety of the program.

   ii. Who is responsible for assessing your area of the program?
   Creativity Workshop teachers are responsible for setting and determining the assessment standards for their workshop offerings. The faculty, as a group, has discussed which Creativity Workshops set high marks, and which seemed to have
set too low a bar. The faculty have also consistently discussed what workshops
seemed to ‘fit’ and which ones seemed not to. Those annual discussions have
provided a growing definition of the boundaries of success.

Independent Study projects are held to standards outlined in the rubric provided to
students in the Independent Study packet. A designated Faculty Advisor guides
students by requiring weekly check ins, and guides the student’s proposal and
presentation development.

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

Earlier programmatic changes are described in the preceding paragraphs
describing the evolution of this program. Most recently, we recognized that a
single trimester yields only 12-14 hours of school time for a student to conduct their
study. We now encourage students to use multiple trimesters or a whole year to
engage in Independent Study in order to truly immerse themselves into a topic.
Intervening trimesters now serve as opportunities to assess progress rather than
final deadlines.

**iv. What are the future initiatives for your program?**

One of the areas of growth is having our CW/IS coordinator compile a centralized
list or database of local community resources that have a history of successfully
mentoring students or providing opportunities for students to engage in their
specific interest area. We need to be tracking individuals who have worked with
students (either well or poorly). When a student wants to do woodworking, it would
be nice to have a list of professionals who have been willing to and successful at
working with our students.

Our Presentation Day has helped solidify the program, but there is room for
improvement. It has been a pretty casual style of presentation thus far in the
school’s development. This makes sense in that we don’t formally teach
‘presentation styles’ as part of the curriculum for Creativity Workshop; we use it
more as a measure of a public assessment of the work completed. However, by
continuing to improve the quality of these presentations, they can help students
prepare for the senior Independent Trimester. We are working to make these
presentations a defining mark of our school.

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

The Creativity Workshop and Independent Study programs offer students an opportunity
to pursue creative interests within a structured format created by teachers or within a self-
directed format on areas of interest not necessarily covered by the rest of our curriculum.
Both Creativity Workshop and Independent Study place value on the creative process,
self-expression, and self-directed learning. They give us further possibility to help us meet
our mission aspects of self-awareness and some of the workshops can help develop a sense
of place. Students come to know, through these programs, many different aspects of
themselves and their strengths and creative abilities.
Through both Creativity Workshop and Independent Study, students may work with local experts in fields such as chemistry, sword making, glass blowing, photography, music, and design among others. These relationships strengthen students’ connection to the community outside of the school and offer opportunities to see how other adults have developed their interests into viable livelihoods.

The steps to developing a solid Independent Study proposal provide an opportunity for our students to develop their grammar and mechanical writing and organizational skills, use of citations, and understanding of plagiarism.

The Creativity Workshop and Independent Study programs have undergone continual refinement since the school’s inception and each year we identify areas that can be improved. For instance, as our student body has grown and thus the diversity of independent study projects (and therefore outside mentors) has increased, we’ve identified the need to provide greater definition of what constitutes a successful project to both the student and their mentor. To further facilitate student success, we recognize the opportunity to develop a database of mentors who we’ve used before for various types of projects and identify those that have been able to fully engage the students and cull out those that have been less accessible.

One area of continual difficulty has been how to include students who participate in local sports teams into the program. During the winter trimester, there are a large number of students who are on the Sun Valley Ski Education Foundation Ski Team or various hockey teams and many of their practice times and competitions occur during the school week – particularly on Friday afternoon. These sports programs also tend to extend into the spring trimester, making the possibility of seamlessly integrating a related Independent Study into their sports experiences very difficult. This is an area of on-going discussion.
Question 25: Each of the school’s educational program components is effectively designed and implemented: WELLNESS

a. What are the goals for your program area?
The goals for the Wellness program are threefold. The first is energy management; physical activity is key to preparing bodies and minds for attentive and alert learning. The second goal is community bonding and togetherness. The communities of Wellness are organized in various ways; in the 2016-2017 school year, Mondays, Tuesdays, and Thursdays were intraband Wellness, Wednesday was choice Wellness (mixed groups of 6th-12th grade students participating in activities like tennis, biking, volleyball, or skating), and Fridays were all-school, mixed-age teams of students and teachers participating in Ultimate Frisbee and soccer. Third, our goal is to get outside, move, and have fun in order to promote general health and well-being in addition to an appreciation of the outdoors.

b. What, if any, curriculum and/or developmental benchmarks does your program use?
We recognize that for adolescents in general, maintaining an active and healthy physical body is key to success and achievement in school. Students' sense of community is also key to their well-being. The different structures and combinations of student groupings in Wellness brings attention to these adolescent needs. However, the school does not use any specific benchmarks to determine the success of Wellness other than participation.

As students grow older, their abilities and desire to mentor younger students grow as well, just as younger students in the 6/7 band feel a desire to connect and play with older students. To facilitate this process, we instituted Wellness buddies during the first trimester of the year, whereby 11th and 12th grade students are paired with 6th and 7th grade students for our all-school activities.

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

i. What research and information is utilized?
Our Head of School has a background in the biological study of play behavior and we utilize his knowledge in the design and implementation of Wellness. The school believes that observing kids play gives faculty an understanding of student behavior that informs other aspects of our school curriculum. Stuart Brown’s book, Play: How it Shapes the Brain, Opens the Imagination, and Invigorates the Soul, has been a major influence on our thinking. The Wellness committee solicits opinion from faculty and students and regularly adjusts the Wellness options and choices based on feedback. One example is replacing one day of all-school Wellness with an additional day of band Wellness after students expressed a lack of the latter.

ii. Who is responsible for assessing your area of the program?
The Wellness committee members, comprised of faculty representatives from each band, are responsible for assessing Wellness.

iii. What programmatic changes have taken place in the past five years? Why?
As the school has grown and our band system has become more structured, our Wellness program has changed to accommodate the growing student body. We have also diversified the Wellness program to give students more options of what games to play and to satisfy the diverse needs of the various segments of the student population. We introduced Choice Wellness – a model where students are given a list of Wellness activities ranging from tennis to dodgeball to 80s aerobics. They choose one of the available options and continue participating in the activity one day per week for one trimester. Last year, we also instituted a weekly Gender Wellness Day (or Gender Identity Wellness). This gives students a chance to play with their appropriate gender identity and gain skills, and makes a space to reduce nervousness that can exist between genders when playing together. However, after a year, the students decided that they would rather keep the genders together, and we abandoned gender wellness day. We’ve made an effort to play together as an entire school more often, and this has helped to foster greater cohesion between the bands and bolstered relationships between students of different ages. Wellness Buddies, another developing initiative, aims to give structure to these inter-band relationships. In the fall, we match older students with 6th and 7th graders to give each younger student a buddy who explains new games, watches out for their well-being, and provides a familiar face in the upperclassmen. Lastly, we’ve formally included Mindfulness as a Wellness activity. Each band meets with a representative from the Flourish Foundation on Mondays to develop self-awareness and to cultivate healthy habits of mind.

**iv. What are the future initiatives for your program?**

As our school and Wellness program grow, we are always looking for more games that can build community and playfulness, both within bands and across bands. The Wood River Valley has many opportunities for physical activities and we plan to continue to explore the ways in which we can expand our Wellness program to better utilize those opportunities (e.g. Hailey Ice, Spirit ‘n Motion Athletic School, Flight Archery Studio). While some students are content to play variations on different ball sports, we’d like to diversify the Wellness experience so that it responds to the preferences of a greater variety of students. Though a relatively young school, we aim to continue building and maintaining meaningful traditions around Wellness and special Wellness days (e.g. ski day, winter carnival, and the moving up ceremony). Our future initiatives for Wellness should always respond to our students’ needs for activity, playfulness, and community building.

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

For most of our students, Wellness embeds joy and playfulness into their school day. It maintains playfulness in our older students and brings levity and energy release for all of our students and faculty. Wellness fosters our unique and close student-teacher relationships because it breaks down traditional barriers between students and faculty. How many students can peg their writing teacher with a dodge ball and have that teacher respond with laughter? Wellness also creates an opportunity to rearrange group dynamics and allows students to express different aspects of their identity. A quiet, studious student in math might become a silly and devastatingly good bandito goalie. Our Wellness
program is unique to Sage and it helps establish and reinforce our school identity. Wellness also serves to assist us in meeting our mission of tending to many aspects of each child. While it allows students the capacities to express different sides of their identity, it further allows each of us as teachers to see those wide-ranging behaviors. From writing their narrative reports each trimester to writing a college letter of recommendation, our ability to see the ‘whole child’ through activities like Wellness, Community Action, and Field Studies, enriches our capacity to see each student deeply and authentically.

Wellness, unfortunately, involves some collateral damage. Students and faculty get injured in Wellness more often than we’d like, and some of that is tied to our facilities. The parking lot is a regular, yet sub-optimal, Wellness arena. We seek to strike a balance between maximizing fun and minimizing injury.

Also, not all students are consistent, enthusiastic participants in Wellness and we would like to grow the culture around meaningful Wellness involvement. We would like to be able to provide more adapted Wellness options for students who cannot participate fully in physical activity due to injury or illness or choose to participate less because of insecurities, inabilities, or simply a negative attitude towards the program. While Wellness is not P.E., for all-school sports, taking a day to develop skills like basic passing in frisbee and passing in soccer is a recommended area of growth because it will give students greater confidence to participate fully.
Residential Program: The residential program operates in a way that assures a balanced, thoughtfully planned and mission consistent experience for students.

Who was responsible for this section of the report?

Question 26. The residential program has a written residential curriculum with defined goals and objectives that supports the school mission and adequately meets the needs of the residential students.

a. How does the residential program align with the school’s mission?

b. Describe the residential curriculum. What are its goals?

c. In what ways does the residential environment, including dining and housing design, support the philosophy of the residential curriculum?

d. Describe the system for formal and informal communications with parents concerning the experience of students in the residential program?

e. What are the purposes and objectives of evening, weekend, and vacation activities?

f. Describe how the school evaluates the residential program.

Question 27. The residential program is integrated into the total life of the School.

g. How does the school integrate the residential program with the non-residential program with regards to:

i. faculty and staff?

ii. students?

iii. policies and expectations?

Question 28. The School accommodates students with different profiles and needs.

h. Describe the range of student profiles in your residential program (international, family structure, etc.)

i. What measures are in place to address their needs?

Question 29. Residential staff members are qualified by preparation and/or experience to meet the needs of students under their supervision.

j. Describe the process for selecting and assigning residential staff.

k. What orientation and training is provided for residential staff?

l. How are residential staff supervised and evaluated?

m. Describe how dormitory staff access and communicate with advisors, counseling resources, and health services concerning residential students.

- What are the school’s overall strengths in regard to the residential program?
- What areas of growth and/or recommendations does the school make in the area of the residential program?
Institutional Leadership: NWAIS schools are self-governing and self-supporting with an institutional leadership structure consisting of a governing board and a Head of School operating in a constructive partnership which provides for the effective oversight, planning, resource development, and day-to-day management adequate to sustain the school’s mission and vision.

Who was responsible for this section of the report?  Harry Weekes
Other Authors: Board of Trustees
Parent Editor: Stephen Thompson
Round 2 Review: Harry Weekes, Chris McAvoy Board Members: Brenda Lyons, Colette Evans, Ginna Anderson

OVERALL STRUCTURE

Question 30. The school’s articles of incorporation and bylaws define and direct the school’s institutional leadership structures, policies, and procedures.

a. Who has legal authority over the school?
The Board of Trustees. Please refer to bylaws under Article III for the Board of Trustees and Article VI for the Head of School responsibilities and authority.

b. Have the school’s articles of incorporation been changed since the last visit (for accredited schools) or in the last eight years (for school going through their first visit)? If so, what changes were made and why?
No changes have been made.

c. Describe any boards, groups, individuals, or other entities that have a substantial influence over the school. Discuss the working relationship between these entities and the school, any influences exercised by these entities over the management of resources, the nature of any rights or powers that these entities hold, and the circumstances under which those rights and powers may be exercised.
The landlord has influence over the school due to the fact that we rent the land and building, except for the two modular buildings we own. The City of Hailey has influence over the facilities and growth of the school via its building codes and land use ordinances. The City would require a conditional use permit if the school wanted to expand or remodel the buildings. In each of these cases, we do what we can to mitigate this control. With our landlord, we have a five-year lease, with three five-year extensions. With the City of Hailey and building codes, we ensure we are code compliant and are exploring a future campus site that is in the County.

d. When were the bylaws last reviewed and by whom? What substantive changes were made and why? Is the governing body currently operating in a manner which is consistent with its bylaws? If not, describe why not.
The Bylaws were reviewed 4th quarter 2015. The school’s statement of nondiscrimination policy was updated to include gender expression and gender identity. The Board increased the number of trustees authorized from 9 to 15. Currently, there are 9 Trustees. To help us meet the goals and strategies set in our Strategic Plan and our new capital
campaign, it was important to have the potential to increase the number of Board members. The tenure was changed from three 3-year terms to two 3-year terms, with the possibility of extending for another term in unique situations. This was done in an effort to increase diversity and refresh the board on a regular basis. The Governance Committee’s succession plan identified the importance of rotating new board members on a regular basis. The Board is operating within the Bylaws.

PARTNERSHIP

**Question 31:** The Head of School and the School’s governing body have developed an effective partnership.

a. **What are the basic roles and responsibilities of the school’s governing body?**

As set by our bylaws the Board of Trustees Power and Responsibility:

All powers shall be exercised by or under the authority of the Board of Trustees. The Board’s primary responsibilities are to determine and guide the character, mission, and culture of the School; to establish overall policies for the School, to direct the business affairs and assure the financial stability of the School; and cause the policies that the Board adopts to be effectively implemented. Without limiting the foregoing of such other responsibilities and obligations as may be found under the laws of the State of Idaho, the Board shall undertake the following responsibilities:

a. Select, nurture, evaluate, retain, and terminate, if necessary, the Head of the School; delegate administrative functions to the Head; and monitor the Head’s effectiveness and performance.

b. Monitor the School’s financial management; approve capital expenditures in accordance with the financial policies adopted by the Board; adopt annual capital and operating budgets for the School; institute, promote and direct major fundraising for the School and otherwise undertake such steps as may be necessary to protect the financial stability of the School.

c. Establish the mission and philosophy of education of the School; develop, implement and update the School’s strategic plan, review the School’s programs to ensure that the School is well-managed in accordance with the School’s mission and purposes.

d. Oversee the general policies for the School for the effective operation of the School.

e. Ensure that the School has adequate physical and financial resources for the performance of its educational mission.

f. Assess the Head’s performance and the Board’s performance on a regular basis.

g. Appropriately communicate with the faculty, staff, students and parents to keep the Board’s constituency informed about the Board’s role in providing for the well-being of the institution.

b. **What are the basic roles and responsibilities of the Head of School?**

The Head is the school’s chief administrative officer. Please refer to Article VI in the Bylaws for more specific details concerning the roles and responsibilities of the Head of School.
The Head’s responsibilities and authority include, without limitation by the specification thereof, the following:

1. Executing and administering the policies of the School, as set by the Board of Trustees.
2. Hiring, evaluation, and termination, as necessary, of all employees of the School.
3. Ensuring by recruitment, selection, evaluation, and training that the faculty is well-qualified.
4. Overseeing the external operations of the School, such as admissions and recruitment, marketing, fund-raising, and relations with constituents.
5. Overseeing the financial operations of the School and the maintenance of its facilities and grounds.
6. Overseeing of the educational program of the School, academic and extra-curricular.
7. Overseeing student discipline, including serving as final court of appeal for disciplinary action related to any student or employee.
8. Assessing the effectiveness of the various operations and programs of the School, and reporting thereof to the Board of Trustees.
9. Upholding and embodying the School’s mission, vision, and philosophy.

c. Describe the partnership between the Head of School and leader of the school’s governing body. How often do they meet? What kinds of issues are discussed?

The Head of School, Board Chair, and one of the co-Vice Chairs meet on a weekly basis during the school year (excluding school breaks). When school is in session they have a standing Wednesday morning meeting to discuss any issues that have arisen, and any areas that need additional attention, such as Trustee or committee expansion, committee-related tasks, or Strategic Plan action items. The primary purposes of the meetings are to ensure the Head of School feels supported by the Board of Trustees, to maintain a consistent dialogue between the Board of Trustees and the Head of School, and to ensure that the Board of Trustee committees are addressing the key points that may be identified during the meeting. Additional meetings, e-mails, or phone conversations are held on an as needed basis.

d. Describe how the Head of School guides and supports the work of the school’s governing body.

The Head of School oversees the operation of the school in accordance with the Mission and Strategic Plan set by the Board of Trustees. The Head of School works collaboratively with the Board Chair to oversee standing and ad hoc committees of the Board of Trustees. The Chair sets the Board of Trustees meeting agendas in collaboration with The Head of School. Our Head of School is the founder of The Sage School, so he also serves as a voting member on our Board of Trustees.
**e. If the organization is part of a larger corporate structure, what is the nature of the Head of School’s involvement in its decision-making process?**

The Sage School is not a part of a larger corporate structure.

**Question 32.** The governing body has conferred the appropriate authority necessary for the Head of School to effectively lead the day-to-day operations of the school.

**a. Describe the balance of authority between the governing body and the Head of School and provide a recent illustration of how this balance works in practice.**

The Head of School serves as a liaison to the daily business of the school life and the administrative duties at the Board level.

At the beginning of the 2015-2016 school year, an enrolled student did not attend school. When the Head of School inquired, he found the student would not be attending The Sage School for the year. A contract had been signed and a deposit made in the spring of 2015. The Head of School took the lead in terms of legal action, contacting the school attorney and immediately brought the issue to the Board. The Head and Board Chair have a weekly standing meeting and usually one of the Vice Chairs attends. The matter and options were discussed at the weekly meetings as well as the monthly board meetings. The Head consulted with the Board regarding decisions to be made in the matter and worked with the board and attorney to resolve the issue.

Some specific examples are as follows:

- The Head does not sit as chair on all of the Board Committees, but rather sits as an ad hoc or non-voting member on The Development Committee, the Finance Committee, and the Governance Committee.
- The Head partners with the Board Chair to create the Board meeting agendas and collaborates on how best to accomplish administrative tasks regularly.
- The Head has handed over the delegation of the self-study material to the Secretary and has partnered with the Assistant Head of School to delegate self-study tasks to faculty and staff where appropriate and needed.
- In terms of legal action, The Head of School is the primary point of contact.

**b. Describe how the Head of School guides and supports the administrative work of the school.**

In addition to managing the faculty and staff, the Head takes responsibility for coordinating the administrative duties of the faculty at large. He delegates tasks and duties to the faculty, and assigns tasks (or, rather, asks if certain individuals would be interested in overseeing certain administrative tasks). Tasks and duties include but are not limited to Admissions, Development, College Counselor, Communications and Marketing, Finance, Risk Management, Facilities, Curriculum, Independent Study Coordinators, Field Studies, Parents, and Wellness. While the Head plays a role in the success of these committees, he also allows for a significant amount of independence in the faculty’s decision making, and will step in to help where needed.
Furthermore, the Head drafts and negotiates all faculty and staff contracts annually, holds weekly faculty meetings, is directly in charge of the finances of the school, aids in the coordination of admissions, coordinates the hiring committee, and creates a Head’s Report for each Board meeting.

c. Describe how the Head of School guides and supports the educational work of the school.
The Head is not only the Head of School; he is also an active classroom teacher. Because he works so intimately with teachers, students and the curriculum on a daily basis, he has meaningful conversations with the faculty about the direction and purpose of Sage’s unique curriculum. He serves as a compass for the vision of the School. He opens discussions in weekly faculty meetings, Parent Association meetings, as well as at the Board level when they are pertinent to the meeting. The Head publishes The Trident, a monthly e-newsletter that highlights different elements and aspects of the school. The physical layout of the school, specifically the Head’s “office” (which is a desk in a common faculty area), makes the Head physically accessible and available to anyone – students, faculty, and families. Furthermore, the Head pursues professional development where and when possible. He is a role model for those who teach with him.

d. What are the Head of School’s goals for the current year? How were they developed? How were they influenced by the school’s strategic plan?
The Head of School has several goals for the current year. The goals range from completing the self-study process, to building out the board, to promoting the ongoing success of our programs and model. The Board and the Head are currently establishing improved procedures for setting and articulating annual goals. Included in this section is a copy of the Head of School’s Performance Goals and Objectives for this year. These were developed in association with the Head of School, Board Chair, and one co-Vice Chair.

EFFECTIVE FUNCTIONING
Question 33. The school’s institutional leadership engages in long-range and strategic thinking as illustrated by having a strategic plan that covers at least a three-year period and that drives the annual work of the school’s Institutional Leadership.

a. Describe the process by which the school’s governing body created and approved the current strategic plan? How is progress in achieving the strategic plan assessed?
The strategic planning process began in the fall of 2014, and included input from all School constituencies – faculty, staff, board members, families, and students. The board actively discusses the Strategic Plan, which is meant to be a living document. We have created strategic priorities and initiatives and are working toward further expanding our action items. We plan to be responsive to our community and environment throughout the planning process. The Strategic Plan includes elements that are primarily overseen by the Board, as well as elements that are primarily staff-driven. Two to three trustees oversee different sections of the Strategic Plan, while the Head of School oversees and coordinates the elements that are staff-driven. These trustees collaborate to set priorities and bring discussion points to the Board as a whole and monitor progress. Self-Assessment related to the Strategic Plan is included in the overall Board Self-Assessment document, designed specifically for non-profit board use by McKinsey. The document asks trustees to assess both the content of the
Strategic Plan and the process of strategic planning, as well as the Board's participation in such planning.

b. How does the strategic plan illustrate that the governing body thinks strategically about the immediate and future needs of the school?
One portion of the plan is “Ensuring Access and Financial Sustainability.” This section illustrates how the Board considers both the short-term and long-term success of The Sage School. “Ensuring Access” is an immediate and long-term goal to provide financial aid, so no student is unable to attend due to financial reasons and to increase diversity. “Financial Sustainability” is necessary for running the day-to-day operations of the school but also means development of cash management policies, endowment, and partnerships for the long-term stability of the school.

c. Describe any emerging issues not addressed in the strategic plan that may affect the future of the school and the plans to address these issues.
The school needs to develop a retirement plan for staff, which could affect faculty retention. The idea is to research types of plans and the cost of them and discuss with the finance and development committees on how to fit this into the budget. We will continue to hone our approach to achieving the goals therein, and adapt the plan as necessary.

d. Describe the governing body’s goals for the current year and how the current strategic plan influenced the development of these goals.
Two major goals this year are to complete the self-study and find a permanent location for the school. Completion of the self-study and eventual accreditation will help with financial stability and partnerships. Not being accredited has hampered the School’s ability to recruit students and develop partnerships. Accreditation will solidify our place in the valley and lead to more support. The campus design group is working on a comprehensive plan for a campus and is pursuing a building site while simultaneously creating a contingency plan. In February 2016, a submittal was made by one of our partners to the county for our first choice of building sites. The campus plan is both a priority within the Strategic Plan and one that supports other priorities within the plan, such as enhancing the learning environment, developing sustainable partnerships, and deepening the staff’s ability to deliver an integrated curriculum based on Human Ecology. The self-study supports the Strategic Plan as a whole by facilitating active reflection.

Question 34. The School’s governing body is of appropriate size, composition, and structure to achieve essential governance duties and support organization priorities.

a. Describe the policies and procedures in place for establishing the governing body’s membership target size and composition and give the rationale for each. What qualities or skills does it seek in its members? If the current makeup of the school’s governing body is not adequate to meet the governing body’s goals, what are its plans to reach the target size and composition?
The small size of our board fits the small size of our school. Moreover, finding trustees is difficult and many people in our community serve on one or more nonprofit boards. We currently have a very motivated and dedicated Board of Trustees consisting of nine individuals and the Head of School. The Sage School’s Board of Trustees can have a maximum of 15 trustees, a recent shift from a previous maximum of 9. Ideally, the board
would consist of 11 trustees. As the school has grown, we feel it is important to be able to add new Trustees to meet our strategic goals. This gives the board flexibility in seeking new board members for critical periods in the school’s future, such as a large capital campaign. In addition, it ensures that at times of turnover of board members, there is still a critical mass of experienced trustees to help shepherd in and develop new generations of the board.

New board members are sought out based on skills we deem necessary to our board such as, financial acumen, capital campaign experience, leadership experience, school governance, and educational or pedagogical experience. Foremost, and most importantly, we seek trustees that have a strong commitment to the school’s vision and mission. In our recommendations for our Board Succession Plan, we plan to use tools such as the Board Profile Grid (available in our Board Manual on site) as a guide to make sure we have or are seeking new trustees that meet the school’s needs and/or to help us meet our Strategic Plan. In addition, the board reflects upon and assesses its own strengths and weaknesses to determine areas for growth in seeking new trustees.

The areas in which we currently need more assistance are in more long-term School Board experience, policy, and legal review. This has been challenging to find in our small community and may require us to look outside the boundaries of the Wood River Valley. We currently use the mentorship of our past Board Chair and Vice-Chair as well as advice from NWAIS. Our Board Chair works with the parent body to find new potential trustees or referrals to other individuals that may have the expertise we need. For example, we sent a recent request to parents asking for assistance on the various board committees. Part of our Board succession recommendations is to have individuals first serve on committees to see if he or she would be a good match on the Board of Trustees. This helps have possible new trustees working closely with existing Trustees.

Our bylaws are structured in such a way to allow for enough trustees to meet the strategic goals determined by the Board of Trustees (please see bylaws in Google Drive). The bylaws set term limits, but include exceptions to those term limits during times of capital campaigns or other strategic goals, and limits to the number of trustees being replaced at the same time. To support the bylaws, we have a Board Procedural and Succession Recommendations document as well as the Role of the Board Policy (available in the Board Manual on site). The document provides recommendations to help assure we have a healthy functioning board. These documents address our Board of Trustee’s procedures regarding recruitment, new trustee orientation, assessment and evaluation, and succession plan. The following forms and documents are used to help us with our Board Procedure and Succession.

b. Describe the policies and procedures that are in place to provide continuity of leadership of the governing body. How is the leadership identified, selected, and oriented? What are the current terms for the governing body leadership?

The Officers of The Board of Trustees include: Chair, Vice Chair and/or Co-Vice Chairs, Secretary, and Treasurer. Officers are reviewed and elected annually by the Board of Trustees at the regular annual trustee meeting. The term is a one-year renewable term. New officers can be added and voted upon at any meeting of the Board
of Trustees. Each officer shall hold office until his or her successor has been duly elected. If a position becomes vacated due to an emergency situation, the Board of Trustees can fill the position for the unexpired portion of the term.

For new trustee members and officers, we have a mentorship process. It is ideal if new officers have been involved with the school at some level or have other expertise necessary to fulfill the officer's duties. Part of our mentorship process is ensuring that the new officer is linked to NWAIS or other resources to assist them in their officer duties. Mentorship is also crucial to help the new or upcoming officers understand the structure and function of the position. We have clear officer job descriptions for each officer position. Mentorships exist between current officers to up-coming officers and/or outgoing officers to new officers. We’ve moved to a Co-Vice Chair structure. This allows more flexibility and support for the Chair while also helping to make sure one of those individuals or another officer can be mentored for a potential Chair position.

c. **Describe the current committee and/or task force structure of the governing body and briefly describe the responsibilities of each committee.**

We currently have four committees including Executive, Finance, Development, and Governance. We also have two ad hoc committees, which are the Campus Design Committee, and the newly formed Capital Campaign Committee. We also have committees based on the Strategic Priorities of the Strategic Plan.

The responsibilities of each committee are as follows:

**Executive Committee:** The Executive Committee shall consist of the Chair, Vice-Chair (or co-Vice Chairs), Treasurer, and Secretary. The Executive Committee shall be authorized to expedite the transaction of business and management of the Corporation between regular meetings of the board. Between meetings of the board, the Executive Committee is authorized to act for the board in matters that require immediate action. The Executive Committee shall also carry out decisions of the board when instructed to do so by the board and shall act on behalf of the board in such other duties as may be delegated by the board. The Executive Committee is also responsible for negotiating the Head of School’s Employment Contract and evaluation of the Head of School’s performance. All formal resolutions by the Executive Committee are subject to ratification by the Board of Trustees and minutes from Executive Committee are provided to the Board of Trustees.

**Finance:** The Finance Committee shall, in cooperation with the Head of School and Business Manager, be responsible for the reporting on the overall management and the financial affairs the school. The Treasurer and any Assistant Treasurers shall be members of this committee. The committee is also responsible for overseeing and reporting on the operation and maintenance of the buildings, grounds and other assets used in the day-to-day operations of the school.

**Governance:** The Governance Committee shall be responsible for creating, maintaining, and updating school policies and Board Procedures. It shall also be responsible for recommending trustee nominations, officer nominations, recommendations for filling trustee vacancies, and the orientation of new trustees. The committee shall schedule and
plan a board of Trustees retreat to be held annually, which will also serve as the board’s annual meeting.

**Development:** The Development Committee shall be responsible for all areas of fundraising for the School, including oversight of any and all activities planned by any group, committee, or association that supports the school. The Development Committee will make a written report of its annual plans to the Board of Trustees each fall.

**Ad hoc Campus Design:** The Campus Design Committee was established to help find a permanent location for the school, determine appropriate campus design and needs based on our Strategic Plan, and develop the physical design of the new campus.

**Capital Campaign Committee:** The Capital Campaign was formed to raise funds for our new facility and to create an endowment fund.

**d. How frequently do the school’s governing body and its various committees and/or task forces meet?**

The Board of Trustees meets monthly during the academic year. Some exceptions occur, such as a conflicting school holiday or other school event. The Board of Trustees meets less frequently during the summer months. The Governance Committee schedules an annual board retreat during the summer or fall, which is considered our annual meeting.

The committees meet at least two times annually, but quite often meet once a month and/or weekly. The number of times the committees meet depends on the current business at hand and the timeline of the action items needed to fulfill the responsibilities of the committees. Minutes for each meeting are taken and submitted to the Board of Trustees at the next Board meeting.

**Question 35.** The school’s governing body has policies and procedures in place for orienting and educating its members.

**a. How are members of the school’s governing body oriented to the school and educated about their responsibilities and the ethics of trusteeship?**

Prior to their first board meeting, each new trustee meets with an existing trustee who serves as a mentor. The mentors have a checklist that sets forth recommendations for effective mentorship.

New trustees review and sign The Trustee Commitment Letter and Conflict of Interest forms. The new trustee’s mentor discusses both documents with the new trustee for any further clarification that may be needed. The mentor provides the new trustee with the board manual called The Sage School Board Notebook and a Trustee Handbook. The mentor summarizes and points out the importance of thoroughly reviewing and understanding the Board Succession Plan, bylaws, board evaluation, and the responsibilities and ethics of trusteeship.

The mentor, in collaboration with the Governance Committee, works with the new trustee to determine what type of training will be beneficial. Training could include the
NWAIS New Trustee training and/or other training which meets the needs of the School and new trustee.

The mentor relationship occurs primarily in the first six months of new trusteeship, but may be extended if needed. Two meetings are recommended.

New trustees are invited and encouraged to spend a half-day in the classroom to familiarize themselves with the school.

**b. What provisions are made for keeping members of the School’s governing body abreast of how the program is fulfilling the philosophy and mission of the school, issues of management of the school, critical issues facing the school, and concerns in the broad field of education?**

The consistent connection between the Head of School and the leadership of the Board is one of the key ways the board is kept abreast of goings-on in the school. The Head educates the Board on any management issues and critical administrative issues via email communications and as part of the agenda, as well as during weekly meetings.

There is a consistent connection between the board and the Sage Parents’ Association. One Board Member also presents at each SPA meeting, and is present during the rest of the SPA meeting. During those meetings, the Board member hears from the various Parent Committees (consistently we have a FUNraising and a “Pulse of the Parents” Committee that presents, sometimes other committees) and also hears from the parent education speaker that the parents have chosen (ranging from bullying to teenage drinking and more) based on their own prioritization of concerns and issues in the school or in the field of education more generally. They also hear reports on the goings on of each classroom during that session. Certainly any issues that arise in these meetings could be brought back to the Board.

The Board uses a few tools to stay aware of how the school is fulfilling its philosophy and mission. The governing body is encouraged to spend a half-day in the classroom each year, which gives them a direct ‘taste’ of the mission and philosophy. Board Members get and read the monthly The Sage School Newsletter (The Trident), which gives a consistent update on the goings-on within the school walls.

In terms of the Board staying aware of larger issues within the field of education, attendance at NWAIS conferences has thus far been one of our key methods.

**Question 36.** The school’s governing body keeps records of its meetings, committees and policies and communicates its decisions appropriately, while keeping its deliberations confidential.

**a. Provide an overview of the ways in which the school’s governing body maintains adequate records of its meetings and the meetings of its committees.**

The Sage School has an elected secretary who takes minutes at each board meeting. These minutes are sent to the Board Chair/Head of School for review. The minutes are then included in the consent agenda for the next meeting.
Other documents that may be included in the consent agenda:
   a) Current meeting agenda
   b) Minutes from subcommittees
   c) Minutes from ad hoc committees
   d) Appropriate financial reports
   e) Head of School report
   f) Special reports

These documents are then packaged after the meeting. They are printed, stamped with the School seal, and filed. The procedure for this was decided at the November 6, 2015 board meeting, and all deliberations can be found in the meeting’s minutes.

Approved minutes of each committee are sent to the Head of School, the Chair of the Board, the school administrative assistant, and the secretary for filing/distribution.

Approved minutes of each ad hoc committee meeting are sent to the Head of School, and the Chair of the Board, the school administrative assistant and the secretary for filing/distribution.

b. What expectations does the school’s governing body have about the confidentiality of its deliberations?
The governing body currently has the expectation that all our meetings are open to the public, faculty, and student body. The meeting times are posted on our school calendar/website. Submittal of additional agenda items can be made no later than one week prior to a board meeting for consideration, as stated in our bylaws.

According to our bylaws:
All meetings of the board shall be open to parents, faculty, and students, except that at the discretion of the board, the board may meet in executive session, at which time only voting trustees and specifically invited guests shall be present. If parents, faculty, and/or students would like to be on the agenda, they shall submit agenda items to the Chair of the Board no less than one week before the published meeting date.

c. In what way does the school’s governing body communicate its role, responsibilities, and actions to the school community?
The governing body communicates its role, responsibilities and actions to the school community in a number of ways. In fall of 2015, the Head of School sent an email which provided an overview of our board members and current board priorities. Also, a member of the board is asked to be present and provide an update at each of the monthly Parent Association meetings. All minutes are filed at the school for parents to view. The website posts board member roles and bios as well.

Question 37: The governing body has a conflict of interest policy.
a. What is the governing body’s conflict of interest policy? If possible, provide a recent example of how it was utilized.
The Board of Trustees’ policy on conflicts of interest is as follows:
ARTICLE XV

Conflict of Interest

A conflict of interest arises in every situation in which a Trustee knows, or reasonably should know, at the time an action comes before the Board or a Committee of the Board, that the Trustee or an Affiliate is a party to the action or has a beneficial interest in or is so closely linked to the action that the Trustee could reasonably be expected to be influenced or to appear to be influenced by the dual interests, regardless of the existence or nonexistence of actual influence, actual benefit, or the apparent fairness of the proposed action.

For the purposes of this policy:
- An Affiliate shall mean (a) a Related Person; or (b) a sole proprietorship, general partnership, limited partnership, limited liability company, limited liability partnership or corporation in or for which the Trustee, or any Related Person, directly or indirectly owns or controls any interest, or which employs the Trustee or a Related Person. Ownership or control of the stock of a publicly traded corporation or limited partnership shall not be material if it represents less than one percent (1%) of the voting power for such class of owners.
- A Related Person shall mean (a) the spouse, parent or sibling of the Trustee, or a child, grandchild, sibling, parent, or spouse of any of the foregoing; (b) an individual having the same home as the Trustee; (c) a trust or estate of which an individual specified above is a substantial beneficiary; or (d) a trust, estate, incompetent, conservatee, or minor for which the Trustee is a fiduciary.

In the event of a conflict of interest, the Trustee has a duty (i) to disclose the conflict to the other members of the Board or Committee; (ii) to refrain from engaging in the discussion or the action under consideration; and (iii) to recuse him or herself from any vote on the action before the Board or Committee.

The minutes of a meeting in which the transaction is approved shall reflect the disclosure made and the fact that the Trustee having the conflict of interest abstained from voting. The mere fact of having a child in attendance at the School is not a conflict of interest within the meaning of this section.

A recent example of the use of this policy arose when two members of the Board of Trustees were engaged in a development project. Quigley Farms LLC is a development group interested in developing Quigley Canyon as a full neighborhood in a way that makes minimal negative impact on the land and in the community at large. It is comprised of three partners, Dave Hennessy from the Hennessy Company, Harry Weckes, Head of School at The Sage School, and Duncan Morton from Summit Creek Capital, and also a Trustee of The Sage School. The Campus Design Group always considered the Quigley land as a possible building site and were actively engaged in pursuing the site as a possible location. When Quigley Farms LLC approached The Sage School Board of Trustees about using the school’s name as an interested party in the development of Quigley Canyon, the board was made aware of the conflict of interest it posed for both Harry and Duncan. As such, Harry and Duncan did not participate in the discussion about the benefits and consequences of having the school’s name associated with Quigley Farms LLC, nor were they allowed voting rights on this particular issue.
The Board of Trustees also approved The Sage School Conflict of Interest Disclosure and Agreement that all board members have signed.

**b. Describe any potential conflicts of interest among members of the school’s governing body (familial, financial, professional, and employment-related relationships) and describe how potential conflicts of interest are managed.**

Currently there are three former Sage School faculty members on the board who have all worked closely with the Head of School. The trustees were not elected to the board while employed, and precautions were taken during the election process to mitigate the perpetuation of any conflict between current board members. Specifically, each former employee expressed interest in furthering their involvement with the school and in one particular case, the board delayed voting on a new trustee until the former employee was no longer receiving any payment from the school.

Our Head of School and Treasurer are partners in the Quigley Farm, LLC, a land development group whose focus is on creating a development project. This is also a place where The Sage School is interested in locating our future campus. Harry and Duncan share interest in both developing Quigley Farms for the community, and finding a place where we can build a new campus. Electing to use Quigley Farms as the School’s future campus site has been inclusive of our entire School community. Public meetings, attended by many different interested groups and the Campus Design Group, investigated all other possibilities for a new campus since the formation of the school.

The board appointed a trustee as well as an additional member of the Campus Design Group to represent the School’s communication with Quigley Farms LLC.

**c. If there are voting members of the governing body not chosen by the school’s governing body, describe how potential conflicts of interest are managed.**

Harry Weekes, the founder and initial member of The Sage School and its current Head was not voted on as a member of the governing body. Conflicts of interest are managed by adherence to our conflict of interest policy and by the fact that the Board of Trustees created the contract under which the Head of School serves.

**Question 38:** The school’s governing body has processes to assess and improve its own effectiveness.

_**a. Describe the process and frequency by which the school’s governing body evaluates itself.**_

The Board is working toward employing several methods of evaluation for its trustees; board self-evaluation is an on-going process. There are two key aspects to board evaluation: self-assessment by individual trustees and overall board assessment via the annual board evaluation.

The Governance Committee has elected to employ a matrix to evaluate each individual’s strengths and weaknesses. This will help the board to understand how individuals work best, and will provide the opportunity for continual growth both individually and as a
team. In addition, it will help the board identify skills and strengths that may be missing in its individual members, and can be used as a recruiting tool.

The annual board evaluation assesses the overall function of the board, determines board needs and areas for improvement, plans for expiring terms, discusses potential changes to the Executive Committee, and sets a plan of action for necessary changes. The annual board evaluation occurs prior to the annual board retreat. Individual and group assessment are important aspects for the board in developing its members and ensuring that we are united as we help the school fulfill its mission.

b. How are the results of the evaluation used to improve its own effectiveness?
This process is still being defined and needs more development. Ideally, the results of the board self-assessment will help us make changes to any area that needs work, whether at the committee level, in communication, reaching goals, or effectiveness of meetings. The Governance Committee is aware that board evaluation is a topic that needs more refinement. We will have a better understanding of our process after we go through an evaluation at our next annual retreat.

Question 39: The School's Institutional leadership has processes to assess and improve the effectiveness of the Head of School.

a. Describe how the school’s governing body communicates its expectations of the Head of School regarding school operations and program.
The Executive Committee of The Sage School Board of Trustees is responsible for negotiating the Head of School’s contract. The contract includes key responsibilities of The Head of School, which are also described in the Bylaws. The Head of School is a member of the Board of Trustees and receives communication (either written or by attending meetings) from the Governance, Finance and Development committees. When school is in session, the Chair and Vice Chair(s) meet on a weekly basis to discuss matters pertaining to the board and school operations and/or programs if needed.

b. Describe the process and frequency by which the school’s governing body evaluates the Head.
The evaluation of the Head of School occurs annually by the Executive Committee. The Executive Committee is working on defining and formalizing the performance evaluation process with the intent of utilizing our plan this spring.

The evaluation is measured against the responsibilities outlined in the bylaws, the Head of School contract, and the annually-set performance goals. Due to the frequency of communications, with weekly meetings between the Chair, Vice Chair(s), and Head of School, and the monthly Head’s Report, there is an ongoing and consistent reflective process and open communication between the Head of School and the board.

c. How is the effectiveness of this process evaluated?
As part of the annual board retreat, we conduct an evaluation of board functioning. We are currently working to revise our board evaluation structure with the intent of having a comprehensive evaluation of how the board is functioning, including the key roles and
responsibilities, such as the Head of School evaluation. We’ve outlined a process and outcome evaluation, which we are currently working to formalize.

d. Describe the process for the periodic review of the Head of School’s contract and compensation?
Our plan is to have the Head of School contract reviewed annually by the Executive Committee, even though the term of contract is five years. The Executive Committee and the Finance Committee will discuss the compensation package based on performance evaluation and budgetary constraints.

e. What expectations and provisions are there for the ongoing professional development of the Head of School?
The Head of School is expected to participate in professional development. It is the hope of the Board through the performance evaluation process to determine areas of professional development that need improvement. The Head of School is actively involved with NWAIS and participates in training and list-serve discussions on an ongoing basis.

PLANNING AND RESOURCE DEVELOPMENT
Question 40: The school’s governing body understands and acts upon its role in fundraising.

a. What giving expectations does the school have for members of the governing body?
Members of the governing body are expected to give what they can financially to The Sage School. It is assumed that there will be 100% participation in the annual fund as well as other school events. The relative effort of each individual to contribute is more meaningful than the actual amount. Our governing documents, such as the trustee job description, mention the importance of financial contribution to the school.

b. Aside from personal giving, how does the governing body support the development efforts of the school?
We are a working board and our in-kind efforts are another source of giving that supports the development of the school. This includes being advocates for the school along with marketing its mission and vision.

The Development Committee, which is made up of at least one member of the governing body, is responsible for coming up with ways to raise money for the School. Through grants, fundraisers, and in-kind donations, the Development Committee works alongside a group of parents on the fundraising committee. As part of the annual budget process, the committee works with the Head of School to establish a reasonable goal for the following year. In addition to this, the committee members work to develop creative strategies to seek long term funding such as directed wills, stock donations and other non-cash contributions.

• What are the school’s overall strengths in regard to the area of institutional leadership?
The governing body and the Head of School have a very cohesive working relationship. The goals and strategies are aligned and communicated frequently. The Head of School keeps the
board informed of what is going on at the School. The board seeks to be as transparent as possible and members are encouraged to seek out input from parents and people in the community. When school is in session, the Head of School and Board Chair and/or Vice Chair(s) meet on a weekly basis to assure open dialog about current issues and/or progress towards goals.

Over the past three years, our Board of Trustees has taken great strides. In the early days of the school, we struggled with keeping Board members on the Board. The amount of work done between the meetings was typically not sufficient for a new school. Some Board members were very effective, although we did not have a cohesive culture. We have seen a new motivation, cohesiveness, and work force displayed in the past three years. We now have a consistent and functioning board that is tending to all aspects of the school. This shift has been the major area of growth we have seen.

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

While the Board has grown considerably, we acknowledge that there is still work to be done. The Governance Committee has a number of draft policies as well as list of future policies to create. We are tracking those, and our current policies, through a spreadsheet based tracking system. The draft policies include a grievance policy, document retention policy, a policy requiring bids for contract good & services, and a gift acceptance policy, among others. We are also developing systems to review our policies periodically. Again, as we look back, the development of our policies has been significant, and we are ready to continue the work. A theme that has improved over the past years, but still needs development is communication with the parent body. This needs development in both a communication policy and also a more consistent pattern and system to communicate with parents and staff members. The board member attending the Sage Parent Association meetings is a direct outcome of this need. The new website will also help keep the school community informed. A marketing plan is being developed to facilitate communicating our vision and mission to others. We are focusing effort on expanding the Board of Trustees. We are in the process of expanding the board. We have identified potential candidates and are working through a process to expand that list and then choose the best fits for the skills and attributes needed. We are still refining our process to evaluate the Head of School, but have documents in place and are planning to do an evaluation before the end of 2016-1017. Our Strategic Plan lays out other clearly defined areas of growth. We have committees to work on each aspect of the Strategic Plan, and have action items for each of the strategic priorities.

Documents To Be Provided (Available in the Google Drive Files):
• The school’s Articles of Incorporation and Bylaws
• The school’s strategic plan
• The school’s governing body’s policy manual/handbook (available on site)
• A list of current school governing body members
• 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/notes from the school’s governing body committees.
• Sections of the Head of School’s contract dealing with issues of evaluation, renewal and termination

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

Who was responsible for this section of the report? Nate Twichell and Harry Weekes
Faculty: Maggie Blatz, Emma Drucker, Nathan Kolar
Parents: Susan Michael
Parent Editor: Heather Daves
Round 2 Review: Chris McAvoy and Harry Weekes

**Question 41:** 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.

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

We are a small school, so communication and congregation between individuals in charge of the various administrative functions happens habitually. As expressed explicitly in our faculty handbook, after a year (or maybe more) at our school, each teacher begins to take on an administrator role as well. A staff member may teach Spanish, but also be in charge of various aspects of parent coordination and student events. Administrative and teaching duties are distributed amongst the faculty and staff so that there is daily contact between students and each employee. Distributing administrative and teaching duties also creates awareness of the elements necessary to run the school successfully and an opportunity for staff members to select administrative duties that suit their strengths and desires.

Sage faculty are in charge of the administrative functions of school leadership, development, institutional advancement, enrollment management, school operations, financial management, and academic leadership. The administrative and teaching duties of each individual are articulated in his or her contract, and the time spent on administration vs. teaching varies widely based on experience and expertise. Because of the horizontal structure of our administration (each teacher is an administrator and vice versa), staff members are continuously in contact with the people they need to access.

At our Thursday all-faculty meeting, we discuss a variety of administrative tasks. Preceding the all-faculty meeting, the Lead Teachers of each band meet to discuss other administrative issues. Teams of staff members who facilitate different aspects of the administrative structure meet additionally as needed. Our August and June faculty meetings also provide an important space to communicate between various administrative structures outside the pace and schedule of the academic year. Finally, the co-founders meet each Monday morning as a global check-in on how the school is functioning, the upcoming week, and touch base on topics both personal and professional.
b. How is the effectiveness of the overall administrative structure assessed?

The Head of School assesses administrative duties. The board and faculty members assess the Head of School and other administrators. As many administrative tasks are distributed amongst teams of staff members, direct, ongoing feedback between peers is another way in which Sage assesses administrative structure. Our faculty meetings also provide a platform to assess and discuss the overall performance of administrative structures and the overall performance of the school. Contracts and duties articulated at faculty meetings provide clear delineations of duties and regular check-ins about how staff are managing their workload. We have also conducted surveys sent to the students, parents, board, and faculty members that asked questions about the effectiveness of the administrative structure. The administrative structure proves its effectiveness by an absence of issues (for example that the school day runs smoothly, students’ days run smoothly, students get into college, and the staff feels supported). We continue to look for ways to hone and assess the efficiency of our system so that we can make our administrative processes more effective.

Question 42: The school’s administration has sufficient resources to conduct the school’s program.

a. 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?

We are a small school without a distinct administrative division, however we still value the administrative duties taken on by each faculty member and allocate resources to support these roles. We have one full time administrator, the Office Manager, and two faculty members, Chris McAvoy and Harry Weekes, who spent a significant percentage or majority of their time working on administration.

For the daily functioning of our school, we have adequate personnel to meet the school’s goals. Our administrators are also teachers intentionally; we bring an intimate knowledge of the school as a whole including budgetary needs, student needs and classroom needs to our jobs as administrators. The Faculty Handbook details the reasons behind the deliberate choice to assign both teaching and administrative duties to the faculty. Currently, our administrative roles are filled effectively and efficiently. Our future development plans may require hiring more personnel to allow more staff members to become full time administrators in order to run capital campaigns or other fundraising efforts.

While teachers fill other administrative duties, the role of Office Manager is a full-time position. The Office Manager ensures that the school functions smoothly and that there is someone available to provide consistent oversight of day-to-day administrative tasks.

We have sufficient funding of administrative duties to meet the school’s needs. Money is available to fix or replace equipment, and we also allocate funds for general upkeep. For the staff, compensation is commensurate with both teaching and administrative duties, and funds for professional development are available to each faculty member to grow as
an administrator. We are reviewing our comprehensive plan and school structure within our long-range financial plan, looking to make our compensation package more competitive.

Because we are a small school, the person who identifies an equipment or material need can be the very person who inspires the need to purchase that item. We don’t have the bureaucracy to bog down requests for materials, but the Head of School will approve the request, sometimes after a discussion with the whole staff or a department to establish need. That being said, we don’t have a bureaucracy to take over responsibilities for some tasks. We do have the resources to meet our equipment and material needs. Grants tend to fill any budgetary gaps. We also cultivate community partnerships to supplement our in-house resources. For instance, we share spaces and resources such as kitchens, workspaces and gymnasiums with local organizations.

**Question 43:** 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)

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

The Office Manager and Health and Safety Coordinator keep abreast of legal requirements such as vaccinations, drills, radon mitigation, etc. Then they develop school protocols or help the school adopt protocols. The staff is then trained on the new requirements. The policies and procedures for this major infrastructure reside in the Faculty Handbook and the Risk Management Manual.

The Head of School and the Board work together to determine larger legal oversight. The Head of School, the Office Manager, and members of the Board have attended NWAIS conferences to refine their understandings of their duties and the legal obligations therein. We have recently shifted our lawyer from a local person living in the valley to a person in Seattle working at a large firm to give us more expertise.

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

The school has a multi-pronged approach for coming in line with laws and regulations. We consult local authorities such as the Fire Marshall, city planning and zoning, as well as external advisors like our lawyer. Through utilizing these resources, we find what regulations we need to come in line with and then we develop procedures to accommodate them if there is not a prescribed response to the regulation. The Office Manager and Health and Safety Coordinator disseminate these procedures and regulations. The Board maintains a governance committee to evaluate compliance.

- What are the school’s overall strengths in regards to its administration?

Our teachers are our administrators and so they understand the elements necessary both to teach children effectively and to run the school smoothly. Every teacher knows at their hiring that they will be expected to take on the administrative roles as they settle in at The Sage School. The school also supports ongoing growth of individual teachers as they learn new
skills or pursue new interests via administrative duties. These factors set up nimble system where administrators and teachers are one in the same so there is no major disconnect between the administrative system and the classroom system. We believe this to be a strength in that many schools have a gap between administration and teaching. We have sought to create a structure to divide responsibilities while keeping us all members of ‘one team’. As administrative duties are divvied out, faculty understand both tasks/issues/information they are responsible for and, also importantly, what tasks/issues/information they do not need to address. This administrative framework buffers individuals from becoming overwhelmed with the minutiae of all administrative tasks.

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

We notice areas where we need to refine our system. Time is always at a premium and teachers are overtaxed at times. Teaching is our first priority to ensure the student experience and meet the school’s mission. But administrative duties need to be done well. We continue to hone the effectiveness of the system, distribution of duties, and the delineation and evaluation of administrative roles. We see another need to make sure that we have clarity of evaluation of the completion of duties and the clear check ins when duties transfer. We also currently use summer as the time to tackle larger administrative issues and projects, but we are unsure if this is always the most effective and efficient plan for all topics.

Documents Provided (available in the Google Drive files):
An administrative flow chart that includes the names and titles of administrators and staff along with the reporting structure
Finance: The school practices sound financial management and its financial operations, resources, planning, and oversight are adequate to support the school’s mission and vision and to sustain the school’s long-term viability and stability.

Who was responsible for this section? Harry Weekes
Board Members: Duncan Morton, Lexie Praggastis, Molly Prekeges
Parent Editor: Linda Kish
Round 2 Review: Harry Weekes, Duncan Morton, Lexie Praggastis, Molly Prekeges, Chris McAvoy

Question 44: The school has adequate current financial resources to support its operations.

a. 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 school is in a secure financial position and has conservatively managed its budgets to ensure continued financial health to support its programs and to fulfill its mission to its students. A reserve fund covers any unforeseen expenditures during any fiscal year so the day to day cash obligations are not affected.

The Sage School’s chief challenge is the yearly operational gap that is closed by fundraising activities.

b. Describe the revenue streams for the school and include the percentage each represents of the school’s total revenue.
The Sage School has five separate revenue streams. The percentages are based on YE averages from 2012-2015, unless otherwise stated.
1. Direct Contributions: This includes individual contributions, board contributions, corporate contributions, and legacies & bequests. Direct contributions represent 14.8% of the total income.
2. Non-Government Grants: Historically, grants have represented 4.1% of the total income. Due to the nature of grants, this number fluctuates.
3. Program-Related Sales and Fees: This includes advanced tuition, tuition, and finance charges, and represents 72% of the total income.
4. Other Sources: This consists of income generated from sales from the school’s greenhouse (minus the COGS), and school goods and apparel. This accounts for 1.0% of the total income.
5. Special Events: These began in 2013 and include events such as the farm-to-table feast, which happens every other year. This represents 0.85% of the total income.

c. 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.
The School currently has $300,000 in reserve funds. This is broken down to $50,000 in a capital reserve fund, $240,000 in an operating reserve/emergency fund, and $10,000 in an emergency succession fund. The capital reserve fund will be funded during the annual budgeting process. Currently the target balance is $100,000. The finance committee is working on a list of items that fall into this category with a projected life span to be used in annual budgeting. Depreciation will also help determine this figure. The operating reserve target balance is 25% of the budget or approximately $400,000. This will be funded over a five-year period by including Operating Reserves in our budget and funding it through the revenue streams articulated above. The Finance Committee and the Board of Trustees are working to finalize financial policies that outline the approval process for accessing these funds. These should be in place by the end of 2016.

d. What is the school’s policy for investment of endowment, reserve funds, and surplus cash? How is it implemented and monitored?
Currently the school has a small endowment of $30,000 that is held in a savings account. It is currently being managed as part of our Financial Policy. The Finance Committee is working on an investment and endowment policy to be presented to the Board for approval by March 2017. The School has contracted with DL Evans Bank in Hailey, ID to manage surplus cash in our reserve funds through their ICS (insured cash sweep) Program. Under this program, the school’s surplus cash is held in various money market accounts that maintains FDIC coverage.

e. What internal or external debt does the school carry? Does the school have adequate provisions for servicing and paying off this debt?
As of August 31, 2016, The Sage School carries $275,925 of loan debt. This loan carries a $12,896 interest payment and $15,246 principal payment each year. The debt payment is part of the annual budget. This loan is not a significant financial burden to the school.

Question 45: 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.

a. How did the school’s strategic plan inform the development of its long-range financial plan?
The long-term financial plan was developed under the assumption that the Strategic Plan would be realized. The financial implications of the strategic plan have been researched and several scenarios have been put together by the Finance Committee for the Board of Trustees. By providing an accurate picture of the fair market value costs of future school needs and goals, school leadership can assess the strategic plan for its financial feasibility and the necessary steps to realize the plan.

Several key elements that emerged from the Strategic Planning process that are included within the Strategic Plan are increasing teacher salaries, supporting ongoing professional development, and ensuring that programs such as Field Studies are appropriately funded.
These specific elements were used to structure and help determine our long-range financial plan.

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

In prior years, school budgeting has been developed with the goal of meeting immediate school needs that grow with its student body. Currently, the school is advancing its planning to include long range forecasts to meet the school’s mission. Part of the long-range process has been to tie it to the strategic initiatives to understand the financial implications of the school’s goals as well as to insure financial sustainability of the school in the future.

Long range financial planning will be reviewed annually by the Finance Committee as it relates to the school’s annual budgeting. Thorough reviews of the long-term plan will be done every two years.

**c. 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 financial challenge the school currently faces is the need to compensate teachers competitively and the increased tuition gap that results from this. The school is building partnerships to form an endowment in order to minimize the total cost of increasing salaries. Further, the school is researching additional revenue generating enterprises, as well as, tuition and financial aid models that align with the mission of the school. This does not affect the school’s viability in the next three years.

The long-range financial plan outlines a calendar for implementing financial changes that gradually improve teacher salaries, while also attending to the tuition gap and its fundraising implications.

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

The Head of School and the Finance Committee develop the annual budget with the input from the school’s CPA/bookkeeper and auditor. Prior to the end of an academic year, the Head of School works with the Finance Committee to review the school’s financial statements. The Head of School then consults with school administration and faculty to refine further the expected school needs for the upcoming year. By academic year-end, the budget is submitted to the Board of Trustees for final approval.

**Question 46:** The school follows practices sufficient for the governing body to provide oversight and guidance regarding financial operations.

**a. What governance group (for example: finance committee) oversees the school’s financial management? What is the composition of this group? How often does this group meet?**

The Sage School has a Finance Committee that oversees the financial requirements for the school. The Finance Committee is comprised of the Treasurer, Head of School,
Board Chair and additional members of the board and community members that have particular expertise in the field. The Board President and the Head of School are non-voting members of the Finance Committee.

The Finance Committee meets a minimum of twice a year to discuss annual budgeting and mid-year updates, and more often if necessary. The majority of the work of the committee is done outside of meetings. Dropbox is the tool used to collaborate on budgets, forecasting and draft policies. Minutes are published from each meeting and are shared with the entire Board of Trustees.

b. How is this group informed about the school’s financial condition and management?

The school’s accountant prepares an updated YTD financial statement compared to budget and a balance sheet before each Board meeting and the Treasurer reviews expenditures monthly. Questions regarding these documents are shared with the entire board, but the Finance Committee discusses the School’s financial management in greater detail at its meetings.

c. What steps does the school take to assure that members of the governing body NOT part of the oversight group are sufficiently aware of the school’s financial condition and processes to permit them to fulfill their fiduciary responsibilities?

An updated balance sheet and budget are included in the monthly Board meeting packet as part of the consent agenda. The financial state of the school is discussed at Board meetings and the Treasurer gives a report on his/her review of monthly expenditures and raises questions if needed.

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

The Head of School works with Becker Chambers (The School’s bookkeeper and CPA) in the monthly oversight and preparation of financial statements, and with Arritt Robins Waters, CPA (the School’s auditor) in the annual oversight of the School’s finances. The Treasurer and Board Chair communicate multiple times a month with the Head of School regarding the school’s financial status and the Treasurer reviews expenditures monthly. The Finance Committee receives updates from the Head of School at Board meetings, from the Treasurer and Board Chair when necessary, and meetings of the Finance Committee.

Question 47: The school follows practices sufficient for the governing body to provide oversight and guidance regarding risk management.

a. What insurance coverages (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?

i. Property Insurance: LOC 1 Building 1: Business Income $300,000; EDP Equipment $45,000, Business Personal Property $150,000; LOC 1
Building 2 & LOC 1 Building 3 each Business Personal Property $5,000; Building $133,000.

ii. Commercial Umbrella Limits of Liability $1,000,000 each occurrence, $1,000,000 aggregate, $10,000 retained limit; Underlying Liability Limits: Auto $1,000,000; General Liability $1,000,000 each occurrence; $2,000,000 General Aggregate; $2,000,000 Prod Comp Ops Aggregate; $1,000,000 Personal & Adv Injury; $100,000 Damage to rented premises; $5,000 Medical Expense.

iii. Directors & Officers Insurance: Aggregate $1,000,000; Per Claim $1,000,000; Employment Practices Liability $1,000,000.

iv. Foreign Liability: General Aggregate $2,000,000; Products/Completed Operations Aggregate $2,000,000; Personal & Advertising Injury $1,000,000; Each Occurrence $1,000,000; Damage to Rented Premises (each occurrence) $1,000,000; Medical Expense (any one person) $25,000.

v. General Liability: General Aggregate $2,000,000; Products/Completed Operations Aggregate $2,000,000; Personal & Advertising Injury $1,000,000; Each Occurrence $1,000,000; Damage to Rented Premises (each occurrence) $100,000; Medical Expense (any one person) $5,000.

vi. Business Auto: Liability $1,000,000; Medical Payments $5,000 (each person); Uninsured Motorist $1,000,000; Underinsured Motorist $1,000,000

The Board Chair and Office Manager have an appointment in December 2016 with the school’s insurance agent to review coverage. An annual review of coverage will become part of the Board work plan moving forward. In terms of significant risks, the school does not insure against floods or earthquakes.

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

The primary means in which the school minimizes financial risks is through constructing a very conservative and flexible budget. This provides safeguards throughout the budget and allows for any reallocation of money as the school year progresses.

The school budgets for unforeseen expenses with an operating reserve fund as a means to hedge risk, including but not limited to, fundraising shortfalls, student loss, or other budget items that unexpectedly exceed their allotted budget. In addition, a Capital Reserve Fund has been established to provide funds for repair or acquisition of buildings, leaseholds, furniture, fixtures, and equipment for the effective operation of the school and its programs.

Furthermore, the school keeps risk to a minimum through risk management policies and procedures (handbooks, training, communications). The Board Chair, Vice Chair and Head meet weekly to stay on top of any issues that may arise and to keep an open, running dialogue. The idea is “no surprises”. The Head of School frequently checks in with the school’s attorney when issues arise that need clarification.
**Question 48:** 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.)*

a. **Describe the school’s audit and financial review schedule and the rationale for this schedule.**

The School has completed three independent financial audits in the last three years in order to gain insights into the financial well being of the school. The school scheduled the audits in preparation for the accreditation process and expects to continue to have an annual financial review by a third party.

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

No management letter was received upon the conclusion of the audits. The auditor found the School to be in sound financial standing.

**Question 49:** Auxiliary services are appropriately funded and mission appropriate.

a. **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 does not offer auxiliary services.

b. **Describe the purposes of each auxiliary service and how each service fits into the mission of the school.** N/A

c. **What is the impact on the operating budget of each auxiliary service?** N/A

d. **How does the school evaluate whether or not an auxiliary service is meeting its purpose?** N/A

**Question 50:** The school forthrightly and regularly communicates its financial status to appropriate constituencies.

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

The School is updating its website to include specific sections for parents and board members that are accessible via user name and password. When the website is complete, the school’s financial statements will be available to registered users of the website. The Board gives updates to the parent body at each PA meeting (every 6 weeks during the school year) and gives an extended presentation on the financial condition of the school at the last PA meeting of the school year. Financial status is communicated periodically to the faculty during in faculty meetings. The school is developing an annual “State of the
School,” which will communicate financial status to donors and all members of the school community.

- What are the school’s overall strengths in its financial operations?
The current Head of School and Board of Trustees are financially conservative, which has aided in the targeted growth of the school in its first seven years of operation. The school has met its budget every year and updates its future budgets based on previous years. In addition, a capital reserve fund and operating reserve fund have been developed.

- What areas of growth and/or recommendations does the school make with respect to its financial operations?
The school emphasizes its continued need for financial support from parents and the community at large by highlighting important milestones in student body growth, hiring of faculty and staff and scholastic programming achievements. The Board is looking into various ways to support the school financially without the continued pressure of increased tuition and fundraising; e.g. indexed tuition and endowment. In addition, the School is looking to expand its social enterprises to augment its financial standing. It is also recommended the school continue operating in a fiscally conservative manner and build out the reserve funds.

Documents To Be Provided to the Team Chair, Vice Chair, Finance Evaluator and NWAIS (Available in the Google Drive Files or have been provided):

- 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 letter(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
- Any other documents that would add clarity to the school’s current and projected financial position
Institutional Advancement: The school has an institutional advancement program that sufficiently supports the mission and program of the school.

Who was responsible for this section of the report? Nathan Kolar
Faculty: Erin Bostrom, Emma Drucker, Maria Maguire, Mike Curran, Maggie Blatz, Erin Howland, Sara Berman
Parents: Michelle Barrow, Susie Michael
Parent Editor: Michelle Barrow
Round 2 Review: Nathan Kolar, Maria Maguire, Drew Harrison

Question 51: The school’s institutional advancement program is designed and operated in a way that supports the mission and program of the school.

a. Describe the school’s institutional advancement program.
   Our institutional advancement program aims to ensure a thriving future for our school. Our Development Committee works to secure the financial resources necessary to carry out the school’s mission. The committee oversees several fundraising events (the raffle and the silent auction at the Farm-to-Table Feast), creates an annual fund, researches and writes grants, and seeks additional individual donations. The fundraisers and annual fund also serve as ways to communicate with the public.

   Our communication efforts are ongoing and we inform both members of the school community as well as the community at large about The Sage School’s work and events in a variety of ways. We often present our Human Ecology projects to the public at the end of trimester. We open our Creativity Workshop and Independent Study presentations to the public. During admissions season, we host an Open House and publish advertisements in the press. We also redesigned our website to be more informative, accessible, and true to the story of our school. Through the work we do in Community Action, we are regularly in contact with different nonprofits throughout the community. Our Head of School sends a monthly newsletter (The Trident) to members and friends of the Sage School and our Office Manager sends a weekly email containing logistical information, as well as photographs and curricular updates. While we don’t have a formal alumni program, our small alumni pool of 34 students are in contact with their former teachers and classmates and occasionally show up at the school during breaks.

   As a small school within a small community, we also recognize the importance of the informal aspects of institutional advancement, such as the conversations faculty have with acquaintances at local businesses, the interactions Sage parents have with their own friends, or the way students talk to their friends at other schools about Sage. This important word-of-mouth information can only be controlled by aiming to create the most constructive, communicative, and thriving atmosphere during the school day itself.
b. How does this program support the school’s mission and program? (Consider relationships with parents, alumni, friends, and neighbors with regards to fundraising, marketing, public relations, community relations, and communications in responding to this question.)

The relationships between parents, alumni, and friends of The Sage School are multifaceted and maintained throughout the year. The annual fund goal revolves around total participation from all members of the Sage community. This is an intentional way to show solidarity and commitment to the mission of the school and serves as a strong statement to other donors.

Part of honoring adolescence means fostering meaningful relationships between the teachers and parents of our students. Every six weeks Parent Association meetings are held at school and subcommittee meetings (Pulse of the Parents, Parent Book Club, Fundraising and “Fun-raising”) are held throughout the community at parents’ homes and restaurants. We recently calculated that if a parent came to all of our PA meetings to hear our guest speakers, came to all of our Book Clubs, and all of our conferences, they would gain 70 structured opportunities to talk about the journey of adolescence in their family as their student went from 6th-12th grade. There are more opportunities than this if they participate in other events or join committees or the board, and while few parents to attend all of these events, we do find many avenues for parents to be significant players in their relationship with the school. The involved parents become informed primary public relations spokespeople for the school as a result.

Various marketing and public relations strategies such as local newspaper ads, the Sage website, our silent auction at the Farm to Table event, Open House, and articles written
by faculty for local publications all articulate our mission and provide us with the support necessary to run our program.

The Sage School mission states that our “authentic curriculum...[is] designed to promote community responsibility.” Each week students dedicate two hours of school time to Community Action projects that foster deep relationships with our community partners and provide a platform for raising awareness and marketing our school to the broader community.

We have many aspects of our school, from Community Action to Field Studies, which are central to our mission and which build relationships, and have the potential to be fantastic marketing tools. We haven’t fully tapped into their capacities as marketing devices, although have used them to build relations. Partly, this is due to a desire to do the work of constructing the programs and being true to them. However, Field Studies, notably, is a program that has a very significant price tag in our budget. It is visual enough to be used as a community and public relations marketing device, which could help, offset its price, but we have work to do to make that happen.

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

The long-term planning has taken many forms: more direct communication with the board, specific strategic priorities, long-term budgeting to include increased marketing, long-term staffing to include more staff time allocated to advancing the school and its mission and philosophies, and more work in creating documents that succinctly describe what we do.

The school developed its current Strategic Plan with the input of as many constituents as possible – board, parents, faculty, and students. The school also created the Strategic Plan with the intention that it would be a living document. The Sage School intends for the document to help guide the work of the Board and reflect the School’s priorities, but also to be able to adapt as circumstances change. The Finance Committee developed the school’s long-term financial plan. It is based on historical budgeting, as well as projecting the school’s needs into the future.

The school has both Strategic and Financial plans. During the creation of these documents, the school also began the self-study process, which included surveys of the board, families, staff, and students. For certain constituents, the surveys highlighted the need for more open communication between certain groups (e.g., communication between the board and the parents), and more broad based communication of what the school does and how we do it (i.e. marketing). Because of the concurrent nature of Strategic Planning and the self-study, the school was able to create a strategic priority around articulating what we do in a broader sense: supporting and advancing an understanding of adolescent Human Ecology.

The school, and in particular the board, recognized the need for more open communication and for more marketing of what we do – from creating materials that
describe what the School does, to looking for ways to create more press releases around our programs, to overall methods and techniques of raising awareness about the school and its programs. While these ideas are not formalized in a long-range institutional advancement program, they were used to create a detailed marketing piece that clearly describes and defines The Sage School. This process built upon a past case statement (developed in the spring and summer of 2015) and began in earnest in March of 2016. The intention of this document is to ground future marketing, advertising, and capital campaigns, to act as a resource for recruiting community members to serve on school committees and on the Board, and as a guide for families.

**The School Has Created an Administrative Structure That Effectively Manages Development/Financial Management**

Question 52: The school has sufficient resources to conduct its institutional advancement program.

* a. Describe how school resources (personnel, materials, equipment, and funding) adequately meet the school’s advancement goals?
  
  Our advancement goals are ultimately dependent upon creating a thriving culture and executing our program to the highest extent. We dedicate personnel from across our constituencies to our advancement goals; for example the Development Committee includes teachers, parents, board members, and the Head of School. Our communications staff do not form a discrete department, but are rather distributed amongst the staff. Band teachers send emails to parents regarding end-of-term presentations, our Office Manager is in weekly contact with the school community through emails, and our Head of Curriculum has organized and implemented yearly surveys of school constituencies. Funding for various needs is consistently available, whether that is for glossy, full-color annual fund appeals, renting a space in the
community for students’ presentations, or purchasing ads in the newspaper or the yearly nonprofit feature edition.

**b. What long-range advancement issues face the school?**
The school faces three long-range advancement issues. The first is location. Our current location, while sufficient to meet our immediate needs as a growing school, does not allow us the capacity to enact our program to the fullest extent. Our built-out campus will include a multimedia design lab, a shop for wood and metalworking, and greater agricultural potential. Building a new campus involves myriad challenges ranging from finding land, complying with local and state regulations, and financing the construction of a new physical plant.

Appropriate staffing and allocation of faculty responsibilities is a second issue. The board wants to have more staff hours dedicated to items like a capital campaign that will help to finance our new campus, among other initiatives. Our Head of School has been identified as a person to lead such a campaign, but doing so may require that he no longer teach actively in the classroom, which in turn requires hiring another teacher and expanding the budget accordingly.

Finally, we continue to suffer from the perception – not necessarily among our families but within the community at large – that because we are not an accredited school that our program is somehow lacking, whether in its rigor or its ability to get students into colleges and universities of their choice. We have substantial evidence that our programs are effective in meeting our mission and that our students are successfully applying and
being accepted to colleges; achieving full accreditation would be another step towards solidifying our reputation.

**Question 53:** The school reviews its institutional advancement management program on a regular basis and revises it as needed.

*a. Describe the review process.*

Although we are certainly attending to the various components of an institutional advancement program, and each of those components has a review process, we are not currently in the habit of associating alumni relations, communications, and development together under the heading of "Institutional Advancement" and also do not have a regular review process at this date. Due to the small nature of our school, however, and the limited number of staff that head each of these programs, there is a significant amount of ‘cross-talk’ between the departments in which the goals of an Institutional Advancement program are being met. As an example, our Development Committee meets regularly to review Annual Fund materials. In the fall of 2016, they significantly changed the timing and structure of the Annual Fund. During this process, faculty members, board members, and the Head of School all worked together to devise a more successful pattern to reach our audiences. They decided to take a more ‘Institutional’ approach. They decided to reach out to Sun Valley Company to get a ski pass as a motivation, hence using the community more. They involved weekly campaign update emails that came from different perspectives representing the faculty, students, and board views on the campaign. While that is only one example, it should serve to demonstrate the desire of the school to look at these tasks from the multiple perspectives required to advance the institution as a whole.

That example aside, we see that this is an area where we need to improve and we are using the self-study process precisely to understand how to improve or clarify our processes. An achievable step is to discuss institutional advancement as a faculty in our pre-school year and post-school year meetings. We could identify goals in each IA area in our August meetings and evaluate our progress in our June meetings, with smaller groups of stakeholders meeting at the conclusion of each trimester to debrief progress, obstacles, and solutions.

**Question 54:** The school interacts constructively with its community and avails itself of community resources.

*a. How does the school view its relationship with the broader community?*

The Sage School works hard to build a healthy relationship with the community. Community responsibility and sense of place are two pieces of our mission that we regularly build into our school. The school and its constituents view the relationship with our broader community as important, and one that needs active attention. Teachers intend for students to learn that a healthy, participatory relationship with one’s community is important.
b. Describe the ways the school benefits from and gives back to the community.
The school and its community have a mutually beneficial relationship. We actively work to construct a relationship where we avail ourselves of the resources that the community can provide, and we allot a significant amount of our school time towards giving back to the community. We continually work to create interactions with local professionals to share their experience, knowledge, and feedback with our students.

One of the major techniques we use for finishing a term is by having students present what they have learned. This authentic assessment is a time for students to share their knowledge with community members and professionals in the field and in turn to learn from experts who use similar knowledge and skills daily. We regularly use local theatres and community spaces for presentations, such as the performance of a student written play at the Liberty Theatre and the presentation of our Creativity Workshop creations at the Community Campus.

Our students are a frequent presence within the community through Community Action. Each student spends two hours each week in Community Action. Students organize food drives and glean fruit for the Hunger Coalition and design projects that benefit local nonprofits through WOW-Students.

Our students spend forty-five minutes per day in Wellness when we play games within our school community and get exercise. We regularly use local gyms, fields, parks and businesses within our community to offer a broad range of activities. As a special Wellness activity, we have an annual ski day at our local mountain. This is a chance to spend a day
sharing an activity within our school community that is important to our local community of Sun Valley.

During Field Studies, we consider all of Idaho and beyond to be our classroom. Students and teachers go on trips to learn from the people and places that surround us as they work to build their own class community. Our students frequent the mountains and rivers of Idaho, study the Oregon Trail in Utah, the history of rock and roll in San Francisco, visit colleges throughout the northwest, and much more.

Our greenhouse is a place where students get hands on experience growing food, which we then sell in local markets to raise money for the school. Students benefit from that experience while the community benefits by having access to healthy, locally grown produce.

Our Independent Study program routinely puts students into a collaborative relationship with community mentors ranging from metalworkers to avalanche experts to photographers. The benefit to the students is enormous, while those mentors benefit through increased business exposure and fostering in youth an interest and investment in their profession.

Our relationship with The Center for the Arts in Sun Valley is a good example of our relationship with the community. There are ways that we have benefited immensely: attending lectures, going to concerts, seeing art exhibits, using their theater space, and getting marketing from them for our involvement in their exhibits. These benefits have added to our curriculum, expanded student understanding and engagement, and expanded the awareness of our school and mission. There are ways they have benefitted from us: we curated and installed a full display as part of their gallery, we have paid for concerts and theater space, and they have gained marketing by having our students and families attend events. The relationship has been wonderful for both sides, and they have given us wonderful opportunities as a result.

- What are the school’s overall strengths in regard to its institutional advancement program?
An authentic curriculum requires strong community connections. Whether through field studies, Human Ecology projects, Spanish classes to local Hispanic businesses, or Community Action work, Sage School students are consistently and meaningfully enmeshed in the community of the Wood River Valley. These community connections are essential to fulfilling our mission and comprise our strongest aspect of institutional advancement.

Our success in linking students with community mentors in our Independent Study program is another strength and acts as an excellent example for the ways that our students are engaged in real-world, authentic educational experiences. Our students also regularly garner recognition for their ongoing and substantial service to the community, which serves to enhance our visibility in the community as well as deepen and expand the types of projects with which are students are entrusted.
What areas of growth and/or recommendations does the school have in regards to its institutional advancement program?

Our alumni outreach efforts need improvement in terms of consistency and coordination. At the present time, our college counselor is nominally tasked with alumni outreach, but communication with them (primarily via email) has been inconsistent. Our Assistant Head of School, who is also the Senior Institute Lead Teacher, has also coordinated alumni surveys, which have allowed us insight into how they reflect upon their experiences here. It is common for alumni to return to campus to visit, which allows us to reconnect with them, although we have no formal alumni-specific events as yet. We also see a need to have students return to classrooms to share their post-Sage School experiences. As our alumni pool grows, the need for consistent, formal avenues of communication with alumni and events geared toward them will become more and more urgent. Ideally, alumni will become our largest constituent body and a powerful aspect of our institutional advancement program.

We also need to create a process by which our institutional advancement program is reviewed, assessed, and modified. The need for this coordination is especially acute because of the variety of stakeholders involved in this program, from teachers to parents to board members.

In terms of development, we are seeking to establish unique fundraisers in our valley and to have a system through which the knowledge to implement these events can be easily passed down to future development team members.

Not having classed these activities together as "institutional advancement," it will likely be necessary and beneficial to review the budget and identify the places where the financial means for implementing our institutional advancement program are allocated and to ensure we continue to have adequate resources. Chief among these resources is staff hours; many of the activities that fall under the institutional advancement heading are done by full-time teachers after their teaching and higher priority administrative duties (Wellness, facilities, college counseling, etc) have been attended to, making hours dedicated to institutional advancement items somewhat sparse.

Documents Provided (available in the Google Drive files):
- Any written policy statements related to the school’s institutional advancement program (none)
- Case statement/ “Marketing Piece”
**Enrollment Management:** The school has defined what it means by a mission appropriate student and has an enrollment management program that sufficiently supports the mission and program of the school.

Who was responsible for this section of the report? Chris McAvoy  
Faculty: Maria Maguire, Julie Zimmerman, Sara Berman  
Parents: Jennifer Card, Katie Corkery  
Parent Editor: Katie Corkery  
Round 2 Review: Chris McAvoy, Julie Zimmerman, Eric Levenson

**Question 55:** The school has defined what it means by a mission appropriate student.  

_a. What is the school’s definition of a mission appropriate student?_

We have defined a mission appropriate student in a separate Word document created by our Head of Admissions, Chris McAvoy, after several years of analyzing admission trends. The document is cut and paste below.

Our mission demands nothing in particular of incoming students. Our mission is centered on developing students from wherever they come into our school towards the particular goals that The Sage School deems critical: academic, cognitive, social and emotional skills as well as self-awareness, community responsibility, and sense of place. A mission appropriate student is ultimately an adolescent who is willing and interested in adopting and working towards these goals themselves. Our school draws from every school in the valley and has students with wide ranges of academic abilities and inclinations. We give no pre-tests on any of these measures.

We have observed that the following students tend to show success in our program more quickly than others:

· Students who have had some experience with programs that require independent learning and management, like those offered at Pioneer Montessori School, The Syringa Waldorf School, the public gifted and talented programs, and the local public dual immersion program.
· Students who have been bullied or have been an alpha-type individual at another school, but who have disliked and are uncomfortable with the social dynamic. These students are quick to understand the goal of building community.
· Students who have struggled with boredom or paying attention in a traditional program, sometimes with ADD or ADHD. We have had most success with families who have sought multiple solutions for their child with ADD.
· Students who are looking to express themselves in methods beyond pen and paper tests.
· Students who are interested in connecting their learning to the ‘real world’, are ready to engage in service to the community, and who can understand the value of that style of learning.

Students who exhibit any of the above qualities or experiences must also be situated in a family that values Sage’s educational experience. The parents will need to support the type of work that students will do here and be willing to assist the students along the path of self-discovery.
The other component to this work is being clear with parents and students what we are not doing as a school. To this end, we have a fairly long and protracted admissions process that includes a one-hour discussion about the school, a full day visitation with a second, shorter interview at day’s end, an open house, and a lengthy application. During that process, we also try to make clear that we are not the type of school that is designed to serve all students. The following students do not easily meld into our program:

- A student (or family) who is looking to take numerous AP courses.
- A student (or family) who is looking for a traditional curriculum, with textbooks, traditional science labs, and many standardized tests.
- A student who has failed the traditional program and is looking for a ‘school of last resort’ to save themselves from impending expulsion.

We work with students and families during the interview process to help them understand our school and whether or not a move to Sage is likely to be a successful move. Ultimately, the students on list two tend to become aware that The Sage School is not for them and tend not to apply after they have interviewed or visited. The students who come from list one are successful, mission appropriate students and tell us that our school is ‘like a breath of fresh air.’

b. How is this definition reviewed and revised over time?
As a fairly new school, this is our first attempt to articulate a mission appropriate student. The observations of our Head of Admission, and a compilation of the previous years experience in admission, retention, and attrition guided its creation. The Head of School, the Head of Admissions, the Admissions Committee, and the faculty have all discussed our definition of a mission appropriate student.

While the document has not been revised, external understanding of our school has changed dramatically over the years. The school started very quickly, over the course of a summer. A key early teacher was Barge Levy, who had just finished a long career at the Alternative School as a teacher and administrator. To some extent in that first year, we were seen as a new Alternative School for students who have failed at other school formats. In the first year of the school, we had to expel or counsel out 4 out of 16 students by Thanksgiving. When we added a middle school, we were deemed a school for ‘gifted kids.’ We are currently reconciling these external perceptions. Our most recent applicant pools seem to indicate that our definitions are coming more in line with the realities.

Question 56: The school has an enrollment management program that is designed and operated in a way that supports the school’s mission and program.

a. Describe the school’s enrollment management program.
The phrase “enrollment management program” feels daunting for a young school with 16 staff. NAIS discusses it as ‘encompassing the four key areas’ of admission management, retention, research, and marketing. Taking these one at a time, our small school approaches each of these facets of enrollment management through coordination, planning, and frequent meetings between key players.

NAIS defines admissions management as “the coordinated effort that advances and tracks students from prospect to enrolled student and beyond... The admission function interacts
strategically with the functions involved in managing your school’s financial aid, registration, orientation, curriculum, and student life.” At Sage School, we link this closely with our retention efforts under the broader heading of building and maintaining our school culture. Having one of the co-founders of the school, Chris McAvoy, be in charge of admissions while also being a central teacher in the curriculum is one of the key ways we protect cultural transmissions. Chris also serves as Curriculum Coordinator and works with other band levels to help promote the school mission in curriculum design, project construction, and Field Studies planning so they maintain the overall culture of the school. Frequent conversations and problem solving throughout the year, intensive discussions in the two weeks of faculty meetings prior to the school year and the one week at the year’s end all coordinate these efforts.

Retention is also linked to school culture. Retention is a topic most frequently discussed between Harry Weekes, Head of School, and Chris. Chris often meets with students who are leaving to gather their perspectives on the curriculum, the culture, the perceived needs of the students, and the stated reasons for leaving. We have, due to the nature of the small town structure, also had follow ups with many of these families as to how the kids are performing and how they have reflected on their time at Sage. These conversations have been compiled into trends that we then discuss with the larger faculty. Together, we look for solutions. For instance, we noticed early in the school’s existence that students in each band seemed to be grieving at the end of each year, as they realized they were ‘losing’ half of their band as students moved into a new band for the following school year. So, we designed an end of the year ‘transition ceremony’ to honor these annual shifts.

Our research is predominately qualitative analysis, rather than quantitative analysis simply because of the small size of our student body. We have worked to categorize where our students come from (see question 55) and where they go when they leave (the vast majority go to Wood River High School, with smaller percentages to Community School and boarding school, respectively). We know our students well and we know their stories.

Our school has done little marketing thus far. Our growth in our first few years was fairly quick: from 12 to 24 to 42 students in the first three years. In year three, the board was interested in expanding the school beyond the building-capacity of 49. We had much discussion and intentionally chose a slower growth model in order to protect our ability to deliver on our mission. This growth came almost exclusively from word of mouth. The school has placed a few ads in the local paper every year, mostly around admission season. We do significant amount of internal marketing, however. For example, the 8/9 teachers send parents pictures of students engaged in their work every few weeks. Harry produces a Trident newsletter that goes to current families and friends of the school. Our Parent’s Association, our Book Club, our back to school night, our new parent orientation, and our social functions for students and parents all serve to intentionally build our culture and all serve as our best measure of marketing.

We approach our enrollment management system as part of the culture-building that we engage in as a school.
b. Describe how your admission assessment procedures help determine whether or not a student is mission appropriate.

Our multi-faceted admission assessment procedures give the applicant an in-depth understanding of the school culture and philosophy. At the same time, the process gives the admissions committee a robust perspective on the prospective student’s strengths and challenges in academic and social/emotional realms. The Sage School aims to attract a wide variety of prospective families and students, and our admissions process helps determine whether a student is appropriate to our mission.

The admission process begins with a family interview, so that the prospective family can gain a deeper understanding of The Sage School mission, and so that we can begin to learn about the prospective student. The next step in the application process is a full-day school visit, in which the prospective student spends the day with a student guide and experiences a typical day at The Sage School. The school visit gives faculty an opportunity to interact with the prospective student in a school setting. Faculty members fill out forms, taking note of any impressions, comments, and observations about the prospective student. School visits culminate with an interview between the prospective student and the Head of Admissions, which provides an understanding of the student’s impressions of the day.

Following their visit day, applicants submit a full written application that includes past transcripts, letters of recommendation, samples of work, and multiple written questions answered by both the prospective student and their parent(s). Our application very intentionally depicts our mission and aims to elicit thoughtful answers that encourage applicants to think about themselves, their academic history, and how/why they would fit The Sage School mission. Just like our curriculum, our applications are specific to developmental levels, so an application for an incoming 6th grader looks different than an application for an incoming 10th grader.

Once all applications are received, an Admissions Committee is formed voluntarily by staff members and led by the Head of Admissions. The Admissions Committee meets as a group to discuss each applicant individually. Typically, applicants are grouped into three categories: Yes, Discuss/Need more information, and No. In cases where applicants require extended discussion, the committee considers how the student might fit in with our school’s mission, what that students’ specific challenges and needs would be, and if we can serve the needs of that child. We also consider what the applicant might contribute to our school community, and if the applicant and their family are applying to our school for appropriate reasons. Our aim is to serve adolescents in their developmental journey, and we weigh whether the applicant has potential to benefit and grow within our school system.

c. How does the school use statistics to support and evaluate the effectiveness of its enrollment management program?

The Head of Admissions and the Head of School have frequent discussions about the admission statistics and the meaning of them. During the 2015-2016 school year, for instance, our school had a retention rate of 87%. The 2011-2012 school year hit our highest retention rate of 100%. We attributed this early high rate to having a group of
highly committed early adopters. Our rates have hovered in the upper 80s to just over 90%. Importantly, these percentages exclude students who moved out of town or who we counseled out of the school. Even with the inclusion of those students, the percentages only drop a percentage or two. Our most common attrition is after 8th grade – students heading to Wood River High School, the Community School, or boarding school. We hypothesized that this rate was higher due to the fact that we had not yet implemented our Senior Institute, and that students did not perceive a significant difference between the middle and high school years at Sage. College admissions were another consideration that pushed certain students to other schools. This is now the third year of the Senior Institute, and our hope is that it is stabilizing some trends at the high school, but it is too soon to tell.

This leads to a larger trend in general about our school and the use of statistics. Our school is intentionally small and is still very young. As a result, statistical trends are not entirely helpful. We have observations and we have established some trends, but those ‘trends’ may have lasted only two years, or may only affect 8 kids total. We have only done one alumni survey of our 21 alumni. We tend to speak qualitatively and about individual students or small groups of students. We need more time to establish statistically significant trends.

d. What does the school learn from retention and attrition information? How does the school use this information?
The Head of Admissions conducts informal exit interviews with departing students and families and charts attrition data each year to find patterns. Given the relatively small number of student departures, individual stories are more valuable than trends. The most significant attrition takes place in the 8/9 band, the Social Animals. Students who leave at this age seem to be aiming to join larger social networks, engage in more competitive teams, or seeking more traditional academic programs. The primary reasons for students leaving The Sage School prior to graduation include: the family moves, the family cannot afford tuition, the academic and social programs are not good fits for the student, the family is using The Sage School as a middle school only, and students are attending specialty high schools to hone specific skills. The Sage School currently does not formally follow-up with students following their departure.

The Sage School primarily uses attrition information to make enhancements to the school’s programming with the intentions of heightening student traditions and clarifying the purpose of the mission. For example, students in the Senior Institute weave the school’s mission into their I-Tri presentations to the student body. Additionally, seniors report their progress with college applications and admissions before students and parents at Creativity Workshop Presentations at the end of each trimester. These changes help students see future opportunities available to them uniquely at Sage. As we continue to establish meaningful traditions that support retention, the school has added a Spring Formal as well as the opportunity for students to create inner-band social events like an evening of bowling, a dance, or skating party.

Question 57: The school has a financial assistance program that is designed and operated in a way that supports the school’s enrollment management program.
a. Describe your school’s financial assistance program and the philosophy behind the allocation of financial aid.

The Sage School’s financial assistance program aims to admit students who would benefit from our community and benefit our community, but would otherwise not be able to attend. The Sage School tries to accommodate families’ needs for financial aid through an objective process that includes using an outside agency called School and Student Services (SSS), our own review, the current budget, and evaluating the needs of the entire applicant pool. All of these tools assess the amount that families are able to contribute to tuition.

The Tina Fabiano Scholarship fund is another form of financial assistance offered to Sage families. This fund was established in memory of a beloved Ketchum resident and is awarded to students who qualify for assistance and reflect an appropriate fit with The Sage School mission. Typically, the Head of Financial Aid, Harry Weekes, and the Head of Curriculum, Chris McAvoy, make these decisions together. Other staff members have been included in the discussion, but these two people do the bulk of the work.

Philosophically, we have used our financial assistance program to ‘top off many cups.’ On our FAQ section of our website, we note that it is unusual for any family to get awarded more than 40% aid for any given year. As a result, we have used our financial assistance program to cast a wide, rather than deep, net. This allows us to bring more students into our doors than would otherwise be able to afford our program. It does not, importantly, allow us to give full tuition discounts to families in great need, which limits the socio-economic status levels of families we can reasonably serve.

b. How does your school evaluate the effectiveness of its financial aid program?

We seek to maintain a wide breadth of financial aid recipients. The effectiveness of our financial aid program is reflected in how many people we can accommodate. We try to ensure that awards are substantial enough to retain students year after year. The positive feedback we receive through acceptance letters from families regarding the amount of assistance they have been offered indicates the success of our program. Expectations and possibilities for financial aid are communicated to families up front to avoid misunderstandings and future attrition.

The Head of Financial Aid works independently from the Head of Admissions until students are admitted, at which time they work with a committee to assess each family’s need for financial assistance. Our Head of Financial Aid attended a webinar in an effort to enhance the effectiveness of the financial aid program. The outside SSS evaluation is a tool that we use to assist us in evaluating our implementation of a needs-based program that provides assistance in the most equitable way.

Question 58: The school has determined the desired number of students and achievable enrollment targets for the next three years or longer.

a. Describe the school’s desired enrollment for the next three or more years.

The school’s projected enrollment targets for the next three years are as follows: between 12 and 15 students per grade with a total school wide population of between 84 and 105 students.
b. **What factors or challenges impact the desired level of enrollment?**

There are many factors that challenge the desired level of enrollment at The Sage School. Private school is costly and a long-term commitment. There are many good private and public school options in the Wood River Valley. Unless there is a tradition of attending private school in a family, families may need education/guidance as to the value of paying for a school that best meets their student’s needs. Other than our extensive exposure in the community as a result of our school programming, word of mouth, and an annual Open House ad, The Sage School does not actively pursue new applicants and rarely uses paid or free publicity. We have good relationships with two local elementary schools as feeder schools; however, one has in its long-range strategic plan to include 7th and 8th grade, which makes the school a potential competitor. Additionally, The Sage School competes with the Community School, a private school in Sun Valley with a strong college-prep reputation, and Wood River High School and Wood River Middle School. The Sage School’s reputation as college prep is still building, as we are a young school. Reputation is a huge factor in student recruitment, and The Sage School is still working to clarify our mission in the community. Additionally, as we continue to succeed at meeting our mission, which includes helping students to recognize the importance of choice in their lives as self-aware beings, it is natural for currently enrolled students to question their placement and consider alternative schooling as they matriculate to high school.

**Question 59:** The school has sufficient resources to conduct its enrollment management program.

a. **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.)**

Our retention rates are high, parent satisfaction is high, and we have enrolled more students each year since we started, which suggests that our school resources are adequately meeting our enrollment management goals. However, we do little in terms of marketing to recruit other students. Our Head of Admissions wears many other hats in the school and is a co-founder who can deliver deep answers to parents questioning the value of a Sage education. We intentionally separate the financial aid and admissions processes. A few years ago we were concerned about whether or not we were administering financial aid effectively enough. We sent Harry as the Head of Financial Aid, to a NAIS financial aid training that proved fruitful. Out of that workshop, we have begun to use more of the power of the data encased in the SSS reports. As a small school, our biggest challenge is spreading the workload of enrollment management efficiently and effectively.

- What are the school’s overall strengths in regard to its enrollment management program?

In terms of admissions, a primary strength is our commitment to holding the school’s mission at the core of the process through the open house tours led by student guides, the initial family interview, the school visit, and the essay questions in the application. These pieces give us a clear picture of the applicant and his or her understanding of our mission. We also
consider it a strength that our faculty is extensively involved in the process and that we have had successful relationships with different elementary programs in the valley. It seems that we are successfully constructing a niche in an area with many choices.

Additionally, while we do not actively promote ourselves in traditional media outlets, we promote ourselves internally through community attendance at many of our end-of-trimester project presentations, which helps show the community our academic focus and student work.

As for recruitment, the school’s reputation and contributions to the community continue to grow so that word of mouth and our commitment to living our mission continues to be our largest method of attracting new applicants. In terms of retention, our relatively small staff allows us to be nimble and responsive to emerging trends, recognized both through statistical analysis and individual stories about Sage students’ journeys. Our growing list of school traditions embedded into the curriculum continue to unite the school community and remind students of the benefits of attending The Sage School.

Another strength is that we separate our admissions process from a student’s need for aid so that acceptance decisions are based on a student being mission appropriate and are not influenced by ability to pay.

- What areas of growth and/or recommendations does the school have in regards to its enrollment management program?
An area of growth for The Sage School in admissions is public relations. We rely heavily on word of mouth to spread the news of our unique mission, our programming, and our student successes. A consequence of this is that we open ourselves up to being misunderstood. We aim to more actively define the school to the community and prospective families. Although we invite our own community to attend many end-of-trimester band project presentations, attendance is primarily comprised of current parents and therefore does not serve as a way to educate the broader community. Likewise, we are not actively trying to promote our story in traditional media outlets. However, we submit an ad to the paper promoting our open house during the admissions season and took out a full-page ad describing our mission and programming in the Idaho Mountain Express’s Nonprofit supplement in the fall of 2015 and again in the fall of 2016.

An additional challenging component of our admissions process is that the Head of Admissions, Chris, also has duties as a teacher, Assistant Head of School, and parent liaison. The school recognizes the need to create a more thorough system to track incoming calls and the need to increase communication and data collection with its growing base of alumni.

Retention at the high school level is an area of desired growth. We see The Sage School as a school to serve all of adolescence. When we have students that transfer to Wood River High School because they believe it will serve them better or because they believe it will offer them more choices of college admissions, we feel as if we are missing the mark of what we want to accomplish. We understand that many schools see transitions and turmoil in the ages between middle school and high school, but in such a small community, and in one that
focuses on the developmental needs of adolescence, when we lose students we find ourselves asking many questions of our program. We have wondered, for instance, if students need to see a bigger shift between our middle-school-aged programming and our high-school-aged programming. We believe that getting accredited and eventually building our own campus will help us to establish ourselves and the effectiveness of our high school programming, but this is still an area we would like to see improvement in.

Documents Provided (available in the Google Drive files):
• Packet of admissions and financial aid application materials
• Enrollment statistics (data on inquiries, applications, yield for retention or attrition)
• Any written policy statements related to the school’s enrollment management program (none)
• Financial Aid Chart and financial aid policies
Human Resources: The school has policies and practices in place to ensure that employees are well qualified, adequately compensated, appropriately supported through effective evaluation and strong professional development, and are sufficient in number to support the school’s efforts to achieve its mission.

Who was responsible for this section of the report? Nate Twichell and Harry Weekes
Faculty: Sara Berman, Maggie Blatz
Parents: Heather Daves
Round 2 Review: Harry Weekes, Emma Drucker, Pat Owen

Question 60: The school has effective hiring practices that result in well-qualified employees sufficient in number to support the school’s program.

a. 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.

Currently, there are no places in the teaching life of the school where we have inadequate coverage. However, there are places where we do not have ideal coverage. One of the clear examples has to do with our administrative structure. The design of the school is to develop a more ‘flat’ structure and share more of the administrative duties with experienced staff. As we have had a significant number of new staff over the years, we haven’t yet had enough to move into administrative leadership positions. As such, founders Chris McAvoy and Harry Weekes wear several administrative hats each and Chris still holds a significant teaching responsibility in the Senior Institute. We want our administrators to still teach as part of what they do, but the balance between the teaching and administrative tasks has yet to be optimized.

We have been constructing the Senior Institute over the past three years. Three years ago, all of the senior staff took on extra duties to get the program up and running, but they were based in other bands. In 2015-16, Chris McAvoy became a Lead Teacher solely dedicated to the seniors, while Science, Math, and Spanish teaching duties were still shared with other bands. In 2016-17, the Senior Institute has 2.5 dedicated staff to it. Currently, all other bands have 4 full time teachers dedicated to them, but also have at least double the number of students. This has lead to an adequate number of teaching staff at each level. We are looking at many ways to use the resources of our teaching staff effectively, while still holding onto a band structure that allows for significant band level autonomy. These ideas and plans are still evolving.

One area of need, since the school has begun, has been to have an adequate number of teachers with a background in History to bring to the Human Ecology block. Our emphasis on Human Ecology has been of particular interest to Science teachers, and we have hired a Science teacher at each level, but we do not have the parallel-strength History teacher to partner with them at each level. This also is something that we have looked at in our hiring, and have considered several different staffing models.

b. How does the school assess the qualifications of candidates and whether the candidate is a good fit for the school?
In order to garner candidates to fill open positions, The Sage School first uses local and national forums to advertise positions (e.g., our local newspaper, NWAIS, Coalition of Essential Schools, American Association of Environmental Education, and similar job posting websites). The Sage School also relies on word of mouth within our community. A Hiring Committee, composed of current faculty that reviews materials and references provided by the applicant, assesses each candidate. The Hiring Process includes extended communication via phone, email, Skype, and when possible, in person. This process helps inform a holistic impression of the candidate and whether or not they are a good fit for our school. As candidates proceed through the hiring process, multiple members of the committee, as well as additional current employees interview them.

Candidates who are local or have the ability to visit the school are invited to spend a half or whole day at the school, so that current faculty can get a better impression of the candidate in the school environment. It also gives the candidate a more complete impression of the job for which they are applying. Extensive interviews coupled with the school visit day help to illuminate whether the candidate is a good fit for our community. During a visit day, the candidate will be engaged by many of the members of the Hiring Committee, additional employees, and a student interview committee. Over half of our staff formally interviews or interacts with each candidate, and we are able to compare our experiences and impressions in order to make the most informed hiring decisions possible. Survey data show that 87% of board members and 72% of faculty feel the school has strong hiring practices and strong candidates in positions to meet our students’ needs.

c. What background and reference checks are conducted to assist the school in assessing potential new employees?

In hiring new employees we ask for references. We contact these individuals in the hiring process to round out our perspective on potential candidates in addition to our thorough interview process. After an applicant has been hired, we do a formal background check with fingerprints through the Sheriff’s Office that are processed through the Idaho Department of Education.

d. Describe the orientation and training program(s) for new employees.

New employees are typically hired in the spring and are asked to acquaint themselves with the employee handbook and the website prior to joining the staff. The recent revamping of the school’s website has also helped to communicate the school’s mission, philosophy and overall programming. Over the summer, current employees will reach out to a new hire to introduce the curriculum in more depth and provide any reading or introductory material. In the fall, the new hires meet with the founders (the Head of School and the Assistant Head of School) for a half-day New Employee Orientation. Then they participate fully in the two weeks of faculty meetings held before the start of the school year, where much of each band’s curriculum is collaboratively refined. The new employees check in with both their direct supervisors (band leaders and department heads) and the school’s founders throughout the academic year. We consider an employee’s first year of working at The Sage School an extended interview, and a chance to find out if the school is the right fit for the employee and if the employee is the right fit for the school.
We have identified several practices and techniques that could optimize the orientation and training for new employees. In the 2016-17 school year, we have added a few levels to help new employees. We have created a ‘New Faculty Luncheon’ once per trimester that is an open forum with the founders of the school. At the first one, we did a brief reading from a booklet that dealt with creating a Quality School. We have added a bi-weekly reflection piece to our faculty meetings. We have also asked those new faculty to identify a colleague that could be a mentor or coach. That individual is designated to read the person’s bi-weekly reflections and be available to offer assistance. We also created a day in the calendar in December of 2016 as a ‘Teacher Conference Day’ where the faculty will spend a morning together, first in bands, and next as a full staff, reviewing the craft of teaching together. From our survey, 70% of faculty feel the school is doing well or very well at training new staff to school systems.

**Question 61:** The school has compensation and evaluation systems in place that are well thought through and are clearly communicated to employees.

*a. 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.*

Starting salaries are based on information gathered from NWAIS, NAIS, and our local public school district, all of which publish salary information. This information is based on years of experience, size of school, and level of education. We also consider our annual budget and enrollment in determining what we can pay staff. This last factor is a major player in the decision making. We know that our staff members aren’t paid as well as they ought to be. Our average staff salary is lower than the starting salaries of other schools in the valley and we below the 25th percentile of salaries in the NWAIS. Combine this with a higher than average cost of living in the valley, and we have a challenging scenario.

We have sought to ‘make up’ some of the difference by having a somewhat robust and creative, although still not complete, compensation package for staff. We have committed to having high quality health insurance for all staff members. Staff members with students in the school can get tuition remission (90%). We have created a wellness benefit, which was originally $600 per year for each staff member to spend, and has increased to $1000 per year, as a way to assist the staff in purchasing ‘big ticket’ wellness related items (ski pass, YMCA annual pass, commuter bike, etc) which would be tough on our typical monthly budgets. Professional development funds and little perks (coffee and treats in the morning for meetings, school-provided lunches weekly), a new schedule with a rotating Monday off for academic disciplines, and access to a corporate ski pass round out little benefits.

Compensation is reviewed annually with raises based on duties, performance, enrollment, overall budget, and cost of living increases. The Head of School makes compensation decisions.

Our survey of faculty and board shows that salary and compensation are an area where the school needs to grow the most. 30% of faculty are neutral or say compensation needs improvement. 25% of the board is neutral on whether our compensation packages were adequate.
b. Describe the evaluation system(s) in place at the school.

“Appendix A - Faculty Evaluation and Compensation” in the Faculty Handbook (provided on the Google Drive) contains our full description of the evaluation system. When surveyed on the evaluation process of job performance 72% of faculty and 75% of the board felt that the evaluation process was done “well” or “very well,” and that it helped promote excellence in teaching at our school.

c. How does the school communicate to employees its compensation and evaluation systems and the procedures and policies for implementation?

Each member of the staff is given the Faculty Handbook. It is up to the Head of School and Lead Teachers to meet with and evaluate staff. The Head of School determines compensation. Survey data showed that 75% of the board and 72% of faculty felt that the systems, procedures, and policies for implementing employee compensation packages were clearly communicated and accurate.

Question 62: The school has a strong professional development program.

a. 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.

The school dedicates $1,000.00 per employee per year for professional development. The use of these funds is up to the discretion of each employee and the needs of the school. Professional development takes many forms- from medical training and certification (WFA, WFR, Avalanche Training), to workshops (NWAIS workshops on gender, Heads of School, diversity), to discipline level training (Training in Organic Language Acquisition for our Spanish faculty), to whole school activities (the entire staff attending the Learning and the Brain Conference in 2012).

The criterion for professional development is any program that enhances an employee’s skills and knowledge. Getting funds for professional development is straightforward: a discussion with the Head of School about the intentions, benefits, and hoped outcomes of the program. 71% of the faculty felt that we did “well” or “very well” at creating a strong professional development program; while 62% of the board thought this program is being done “well” or “very well.” We hope to keep growing this component of the school as we grow.

b. What amount of money was spent on professional development during the most recent full academic year?

$17,992.00 was spent on professional development in the 2014-2015 school year. $11,087.00 was spent in 2015-16. With additional funding from a donation, we anticipate the amount for 2016-17 will go up.

c. How is the effectiveness of the school’s professional development program assessed?

Discussions before, during, and after the programs help qualitatively assess their effectiveness. We determine if the faculty member has acquired skills they need to deliver in their subject areas, or guide in Field Studies, or otherwise lead and support program
areas. Upon returning from professional development opportunities, staff members report back to the staff as a whole during weekly Faculty Meetings. This process helps to spread any gained information as well as informally assess the value of the professional development experience. The ongoing dialogue about what teachers have found useful and what programs have been lacking forms the basis for assessing our professional development program.

**Question 63:** The school regularly reviews its compliance with applicable employment-related federal and state laws to manage risk.

* a. How does the school review its compliance?*

The Risk Management Coordinator and Office Manager work closely with state and local authorities to ensure that we are in compliance with all state and federal regulations. We post all compliance documents visibly in the school, so that all employees have access to them and can understand coverage. All employee rights and regulations around termination, etc. are outlined in each employee’s contract. We also make sure that we are in full compliance with the state of Idaho worker’s compensation plan and clearly and promptly respond to any medical incidence that might affect an employee’s ability to work.

* b. Are there any areas of non-compliance? If so, how does the school intend to address these areas?*

There are no areas of worker safety or major regulations with which the school knowingly does not comply, but we are always reviewing regulations to make sure that we stay current.

**Question 64:** The school has an effective process for communicating essential human resources-related information to employees.

* a. How are employees informed of changes to benefit programs?*

Each employee receives an annual contract that details the upcoming year’s pay and benefits. In addition, Appendix A of the Faculty Handbook details faculty compensation tables and benefits. The handbook is updated annually and distributed to the staff at the fall meetings. We discuss any upcoming changes to human resources related decisions as a staff, and relevant information is communicated via email or in-person during our weekly faculty meetings.

* b. How are employees informed of state and/or federally required information?*

Due to our administrative structure, which assigns employees administrative duties as well as teaching duties, teachers are often the ones ensuring state and federal compliance and disseminating relevant information. Information is communicated either by email or in-person during staff meetings. We also display information like emergency protocol, minimum wage and worker’s compensation information in our main office.

* c. How are employees informed of performance assessment, compensation, and contractual expectations?*

The Head of School and Lead Teachers inform employees of their performance assessment through regular meeting and conversations. The Head of School discusses contractual expectations and compensation with employees and then formalizes the items
discussed in the employees contract. These conversations refer to the expectations laid out in the Faculty Handbook.

As we have grown from a staff of 3 to a staff of 16, this task has gotten more complex. Lead Teachers now have more immediate contact with the band-level teachers, and their insights in to staff performance are more helpful to the Head of School then they were in the earlier days of the school. We have been adjusting the system as the school has grown, and anticipate more adjustment in the years to come.

• What are the school’s strengths in the area of human resources?
Due to the size of the school and our overlapping teaching and administrative duties, we are constantly communicating as a staff. Each employee interacts with all other employees. This leads to accessible and comfortable lines of communication to address any issues that arise. The team-teaching of Human Ecology, as well as the structure of our building, allow colleagues to see each other teach, communicate and assess on a near daily basis.

Other strengths include the clarity of employees’ annual contracts, which state duties and expectations. The staff receives high quality medical, dental and vision insurance plans. In addition, the school strives to show employee appreciation in ways that go beyond paychecks including the Wellness benefit, free meals during the week, and public acknowledgement of good work.

Through all of the above, we have created what feels like a true ‘community of teachers’ at Sage. The staff work together well, laugh frequently, and take on the various tasks of building a new program with enthusiasm and teamwork in mind.

• What areas of growth and/or recommendations does the school have in the area of human resources?
Articulating evaluation systems, compensation, and implementing systems that make people feel valued in their work are all things we want to continue improving. Clearly we need to be working on supporting teachers with adequate time to get their tasks done, money, and clear expectations on their performance. We have work to do to make all of these more supported aspects of the school.

We are working to implement a clearer system of ‘direct transmission’ for new teachers at Sage. This school can be not as easy to transfer into. We are working on building a school that relies on a different style of teaching and learning, so it follows that it takes time to adjust. Modeling language we use with students, modeling teaching styles, and helping new staff understand how to construct projects all takes time. If we compare ourselves to, for instance, a Montessori School, those teachers spend two years in training before they are in the classroom. At Sage, teachers are in the classrooms within dozens of hours of our interview. We are implement programs where teachers and administrators work in pairs, with one person acting as the mentor and the other as the mentee. We want develop support systems for new staff to help them understand their roles and expectations.

Documents Provided (available in the Google Drive files):
Employment non-discrimination statement
· Personnel handbooks (Faculty Handbook)
· Copies of any forms used in employee evaluation and supervision
School Plant: The school’s plant supports the mission and program of the school and is maintained over time in a manner that is sustainable

Who was responsible for this section of the report? Nancy Linscott  
Faculty: Erin Bostrom, Kristen Barr  
Parents: Julie Cord, Courtney Loving  
Parent Editor: Kristen Wright  
Round 2 Review: Nancy Linscott, Harry Weekes, Chris McAvoy

Question 65: The school’s physical plant supports the school’s program in a manner consistent with its mission. 

The true alignment of our plant with our mission is something that we are deeply interested in. We believe to truly create that alignment, we need a new facility, something that we have begun to develop the possibility of in our work with Quigley Farm and Quigley Foundation. For us, that means considering questions such as the following list:

• What does a ‘developmentally appropriate’ room look like for the 6/7 Explorers? How is that distinct from a room that honors being a Senior Owl?  
• What ways can a building promote a sense of place or community responsibility?  
• How can we construct a building that honors Human Ecology and allows us to uphold our vision of creating thriving and sustainable human and ecological communities?  

These are large questions that we are only at the beginning of being able to answer, but are very much looking forward to pursuing the construction of just such a facility. However, in the meantime, we believe we have a highly functional, although not ideal, building for our program. The answers to the following questions seek to acknowledge the functional world we are living in, but also point towards the ideal world of where we would like to reside.

a. Discuss the functionality of the physical plant and its appropriateness to the educational program of the school.

The school plant consists of a main building, two modular buildings connected by a shared deck and covered roof, and a greenhouse. A full description of the property and details regarding each building’s classrooms are provided in the Campus Master Plan. The main building and greenhouse were originally constructed in 2004 to serve as a retail garden center and were not designed as a school. Creative modifications to the main building since its construction and the recent addition of the modular buildings in 2013 have resulted in a campus layout that supports student/teacher interaction while maintaining adequate separation of the classes.

Clever scheduling helps create a campus atmosphere by allowing movement to different parts of the plant for different activities and courses. The class schedule may alter year-to-year as band sizes vary or faculty needs change; however, the overall idea is to utilize the available space in a way that optimizes its functionality while minimizing noise conflicts. The three buildings contain flexible classroom space and each building houses a band in a homeroom. We have one classroom specifically designated for Spanish, which is left open with minimal furniture to allow space for free movement and the games played as part of the OWL teaching method. We also have a room hardwired for the Internet, which best supports the online ALEKS program. The seniors have their own room in the
center of the main building. The main building also houses the school’s main office and has common spaces outside of the classrooms where students can work together and divided carrels for individual workspaces. Half-walled shelves house the school’s library. A large basement beneath the main building provides storage.

Several components of our program require or encourage students to be off-campus, namely Community Action and the Creativity Workshop/Independent Study. Students venture off-campus to work with local mentors to pursue areas of interest. For example, students work with professional chefs, builders, welders, artists, and other professionals at their studios or workshops rather than on-campus. Students also leave campus with their band for Community Action. The Sage School also relies on available community resources for school-wide assembly purposes.

We also leave the campus for several Wellness games. When we aren’t off campus for Wellness, the program requires easily accessible outdoor space to play organized games. Under the current agreement with the landowner, the school makes use of the 2.6-acre lot to the south for games. We also use a public easement in the northwest section of the Airport West Subdivision.

We converted our greenhouse into a solar-powered aquaponic garden that we cultivate year-round. In the spring, students plant tomatoes to support The Sage School’s annual Tomato Share Program. Students plant seasonal greens in the winter to sell to local retail grocers and restaurants. Under the direction of our greenhouse-manager Sara Berman, students maintain the greenhouse. Teachers also integrate the greenhouse into the science curriculum.

Overall, our campus can be described as workable, but not optimal, primarily due to lack of space and spaces built specifically for certain activities such as a science kitchen, cafeteria, assembly hall, conference rooms, workshops, and storage.

**Question 66:** 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.

*a. 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.*

The school is actively engaged in long-range planning that would include purchasing land and building a plant intentionally designed to accommodate all aspects of our academic program. Features of the potential campus include a commercial science kitchen, a workshop, auditorium, cafe, gardens, greenhouses, and teacher and student lounges. The Campus Design Group met on a regular basis to evaluate potential sites and determine actions required to continue advancing the project. The board identified a preferred alternative site located east of the Hailey City limits on a privately owned 1,500-acre parcel that is in the preliminary development application phase with Blaine County. If approved by the county, The Sage School intends on initiating a capital campaign to acquire land and build the school. However, the board is keenly aware that the county process may take considerable time and approval is uncertain. The board acknowledges
that the time needed to raise the necessary funds and develop the site may possibly take more than three years. In the interim, The Sage School has a secure lease in a workable facility.

**b. If the school leases its campus or facility, what are the terms of the lease?**
The Sage School signed a five-year lease on September 1, 2014. The lease expires August 31, 2019; however, there are renewal options consisting of three additional five-year terms. The Sage School is secure in its present location until 2034.

**c. If the lease is scheduled to expire before the next accreditation visit, what plans does the school have to address this?**
The lease does not expire before the next accreditation visit.

**Question 67:** 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.

**a. Describe the respective roles of the administrative staff and the governing body in relation to decisions affecting the physical plant.**
Every staff member plays a role in recognizing and bringing to light opportunities for improvement of the physical plant of the school. Beyond this, certain faculty members have assigned roles for managing areas of the school plant. These roles are: Facilities Manager, who oversees and works in tandem with people who assist on technology, vehicle, building, and grounds maintenance; Cleaning Manager, who oversees the janitorial supplies; and Greenhouse Manager, who is responsible for any decisions regarding the school’s greenhouse and its operation. When faculty members notice issues or see opportunities for improvement in functionality, they are encouraged to bring their idea directly to the Head of School or one of the Facility Managers, depending on the scale. Generally anything of significant cost or any decisions regarding change to the physical plant requires review from the Head of School.

**b. What are the long-range facilities issues facing the school?**
Our current space lacks elements that provide for optimal functionality, such as a designated assembly area large enough to comfortably (and legally) accommodate the entire student body and parents, adequate storage and supply closets, classrooms with floor-to-ceiling walls and functional doors to prevent noise bleed, a cafeteria/lunch space, spaces intentionally designed for specific mission-driven programs, and outdoor play spaces.

Our ability to implement long-range goals for the campus in its current location is not possible for several reasons. First, the School leases the property; therefore, building permanent structures or making extensive modifications to the existing buildings cannot be considered. Acquiring the current property for the purpose of building a dream campus is also not feasible because the lot is not big enough to support additional buildings or additions to the existing buildings due to the City of Hailey’s zoning ordinances.
For these reasons, the Campus Design Group is working on developing a plan for ultimately relocating The Sage School to school-owned land with buildings constructed specifically to fully implement the mission and vision. The primary issue will be raising the capital funds required to build a new campus.

**Question 68:** The school demonstrates annual and long-range budgeting practices and adequate asset allocation to support plant occupancy, maintenance, and safety.  
   a. *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?*  
   Yes. The budget for operating the plant is $75,000 annually, which covers materials, fees, depreciation expenses (repairs and maintenance), vehicle leases, snow removal and landscaping, and materials needed for daily operations. At the end of each fiscal year, amounts remaining in the budget roll over into the following year’s budget to create a financial cushion in the event unforeseen issues arise outside of the usual scope of operations. We purchased our modular buildings with that money.

   b. *Describe plans for the ongoing maintenance, replacement, or improvement of the current school facilities. Who is responsible for the oversight of these plans?*  
   Maintenance and improvements to the existing plant occur through routine schedules (e.g. carpet cleaning, furnace filter changing, landscaping), and on an as-needed basis for plant operations that crop up unexpectedly. The Facilities Manager and other staff/managers typically work in tandem on the issues that effect the campus as a whole and do walk-throughs throughout to develop a list of items that need to be scheduled for repair, maintenance, or improvement.

   Within the next three years, anticipated needs include vehicle upgrades and additions, heat tape on the roofs to prevent ice dams, and technological upgrades to our Internet access. The Facility Manager works with the approval of the Head of School to manage the completion of facility improvements and maintenance.

**Question 69:** The school has adequate systems in place to support the technology needs of the program and the administration.  
   a. *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?*  
   The Sage School encourages students and faculty to bring their own computers. To provide an option for those without a computer, the school has a fleet of about 10 desktop computers and about 30 Chromebooks that are available to all students.

   The budget for technology is $12,500, which allocates $10,000 for hardware and $2,500 for software. This budget supports maintenance, replacement, and upgrades of computers and software as necessary.
**b. Describe plans for upgrading, servicing, and replacement of the school’s hardware and software. Who is responsible for the oversight of these plans?**

We upgrade the school’s technology as needed. As certain programs or needs evolve, technology is updated to stay current with those changes. Certain people are assigned to the servicing of the school’s hardware and software, but other faculty members fix and improve the technology as they see needs arise. The school’s Office Manager maintains the computers and Internet service. When they see needs arise, faculty members approach the managers of different aspects of the school’s technology and the Head of School who refer to the budgets and determine different paths to solving the problem.

**c. How is the school strategically assessing and planning for its future technology needs?**

The school is constantly assessing its use of technology, and balancing its desires for new resources within its budget with the academic needs of our students. There are plans to re-visit our system when we move to a new campus. Those plans are largely conceptual at this time, and will find grounding when the move becomes an imminent reality.

- What are the school’s overall strengths in regard to the school plant?

We use our current facility effectively and in a way that supports our school’s mission. On a basic level, we have enough classroom space to accommodate our current number of students and the courses that we offer. The open layout of our floor plan creates an atmosphere of diverse learning, and collaboration, and cross-pollination.

A strength of our school is our ability to partner with and use facilities in the larger community. This allows us to keep costs lower. We don’t need to construct an entire theater production facility for the limited number of times we use it, and can rent one close by. Our location close to town also allows us to engage in the resources of the wider community, and makes our involvement in Community Action and in using other Wellness facilities convenient.

We actively sought, and were incredibly lucky to find, a facility in Hailey that had an attached greenhouse. Our use of this space is a true strength in that it creates unique opportunities for students to involve themselves in natural ecologies, agriculture, community service and small-scale commerce, allowing a more full expansion of our ability to deliver on our mission.

In the purchase of our modular buildings, one of our strengths was insisting on a design that truly incorporates them into the existing facility. It has created a ‘campus feel’ with the multiple buildings and the attached deck.

- What areas of growth and/or recommendations does the school have with regard to the school plant?

As the school continues to grow, additional space would accommodate needs such as parking, assembly areas, and indoor and outdoor spaces for Wellness and Creativity Workshops. Additional Creativity Workshop and Human Ecology areas would include: kitchen, bike shop, and wood/metal shop. We would also benefit from private office areas for faculty. With increased use of the school’s computer network, the school would benefit from a private...
Internet network. As technology continues to evolve, the school would like to remain flexible to those changes through its acquisition of computers and other hardware and software necessary to implement or expand on academic programs and workshops. More consistent oversight of the school’s technology would help maximize the existing resources. An improved library space and a system for organizing the library inventory that is less reliant on volunteers may increase use.

The school’s population is larger than the available seats on school-leased vehicles, which requires the use of rental vehicles for Field Studies and shuttling for school-wide events like certain wellness activities or Creativity Workshop presentations that occur at off-site locations. This is a trade off that seems worth it for the cost efficiency, but is an area that is worth revisiting.

Documents Provided (available in the Google Drive files):
- Campus Master Plan
Health and Safety: The school has established and effectively implemented policies and procedures that promote a safe and healthy school environment consistent with the mission of the school.

Who was responsible for this section of the report? Nathan Twichell and Nancy Linscott
Faculty: Maggie Blatz
Parent Editor: Megan Burks
Round 2 Review: Nancy Linscott, Maggie Blatz, Matt Leidecker, Mike Curran

Question 70: The 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.

a. Articulate the underlying beliefs about the school’s responsibility for the health and safety of students both on and off campus.

We prioritize the care of our students and faculty and value their physical well-being and safety as well as psychological, social-emotional, and community health. We implement a number of policies and programs to support our students’ wellness and reduce hazards. Our Risk Management Handbook is a useful tool available to all staff members to help guide our daily operational and programmatic practices and inform decision-making in the field. After asking staff members to review this document at the beginning of the school year, and reviewing key aspects of it together as a staff, we refer back frequently and employ the policies as necessary. Throughout the school year, we discuss field and campus-based scenarios during staff meetings to review health and safety protocols. We cannot completely eliminate risk from the lives of our students; instead, we make sure that the risk we assume is reasonable and necessary to fulfill our mission.

During our conferences and other communications with parents, we frequently discuss the health of students inside and outside of school. The parts of our mission that include social and emotional skills, as well as self-awareness and community responsibility are not limited to 7 hour per day sessions. Even tending to students academic skills finds us discussing habits at home and how they effect students’ skill development. We promote valley mental and emotional health resources through in-class presentations by various organizations’ outreach programs and guest speakers at our SPA meetings. As the need arises, we provide a list of services offered in the valley, although we make no specific recommendations of services. We also use our local resources to supplement our teaching on specific issues. Experts from Planned Parenthood help teach sexual education, the Drug Coalition educates our students about substance abuse, and we employ Green Dot training to foster a nonviolent community.

b. How does the school evaluate and review its health and safety policies and practices?

We review and evaluate our health and safety policies and practices by analyzing each incident as it arises and scrutinizing our overall safety record over each academic year. After each health or safety incident occurs, a faculty member fills out an Incident Report Form. We discuss the incident during our weekly staff meeting and evaluate and refine our policies as needed. We complete a similar process of evaluation and review at the end of the school year to identify areas for improvement. We respond not only to events at
school but also to incidents in the valley and the nation as a whole. We review documents from other organizations of similar size and scope to develop our policies and procedures.

In April of 2015, an independent review of our Field Studies program was conducted by Jody Donovan from Teton Science Schools and Melanie Mildrew from St. George’s School. Recommendations and commendations they provided have helped us implement protocols and strengthen our existing procedures for mitigating and managing risk. Based on their suggestion, Nancy Linscott attended the NOLS annual Wilderness Risk Management Conference in Salt Lake City in October of 2016. The opportunities of independent review, combined with comparing and contrasting practices of other schools has helped us strengthen our overall health and safety philosophy and view it as a dynamic process of continual improvement.

c. How are parents and students made aware of these policies and procedures?
Relevant policies are included in the family handbook which all parents and students read and sign before the school year begins. We discuss and publish emergency protocol in all of our classrooms and perform school-wide drills. Before venturing into the field with our students, we discuss our off-campus policies and procedures with students in the classroom and communicate the same information to parents via emails, detailed itineraries, field trip consent forms, and/or orientation meetings. We strive to have open and easy communication between parents and teachers. Parent and student surveys show that 77% and 87%, respectively, feel our school is doing “well” or “very well” at informing them of our health and safety procedures.

d. What provision is made for faculty and staff instruction and review of these safety procedures? How is the effectiveness of this training evaluated?
At the beginning of each school year, each staff member is asked to read and review the Risk Management Handbook, and teams discuss their roles and responsibilities before going into the field, and certain points and scenarios are discussed as a whole staff. Throughout the school year, we have extensive conversations in faculty meetings and review significant incidents. We also discuss and prepare for emergency situations. We use the ILoveYouGuys.org standard response protocol for school-wide drills. Group discussions and the Risk Management Handbook guide our decision making when planning trips and Field Studies, and we take care to review and flag all medical issues before going into the field. The school prioritizes and pays for medical training (WFA/WFR/CPR) for faculty. We have a designated Risk Manager who attends conferences on best practices, and does crisis management and communication trainings. She is also forging alliances with the local Emergency Planning Committee to stay informed on local emergency response practices. Real world experience ultimately guides the evaluation process. To evaluate the effectiveness of our training, we discuss policies with parents, teachers and students and analyze survey responses. A recent survey found that 81% of the faculty believes that the school is “doing well” or “very well” at implementing strong and clear policies and procedures surrounding health and safety. The faculty believes that they are adequately trained for these procedures.

e. How does the school promote nutrition of children?
We promote nutrition of children not only as a way to support the health of our students, but also as a logical derivative of our mission. We strive to model balanced diets when the school is directly responsible for providing food. On Field Studies, students plan all meals, buy ingredients and do all of the cooking with teacher oversight. The school also organizes three days per week when students can purchase lunch from local restaurants. One of these lunch providers is the Wood River Sustainability Center, which offers locally sourced, fresh food in school lunches. Teachers and students work together to maintain our greenhouse. The greenhouse helps teach the value of fresh, locally grown food. Additionally, one year of the Human Ecology curriculum in the 10/11 band is dedicated to the study of food. This includes the study of nutrition, food production and transportation, the cultural significance of food, and culminates in a community-wide farm-to-table feast planned and executed by the students. During the ‘Year of Self’ in the 6/7, the students also create a Food Festival that looks into their family history to find important recipes. The students prepare those recipes for the community, and do a nutritional analysis of that food as well.

**Question 71:** The school gives appropriate priority to operating its buildings, equipment, and grounds in a safe manner.

*a. Describe the process to support the ongoing safety of the facilities, equipment and grounds.*

Our school pays attention to the ongoing safety of our facilities by making sure that we have snow removal in the winter, implementing a safe traffic plan for pick ups and drop offs, backing in our school vehicles, and other pertinent procedures. We also have several building-specific protocols such as raking the snow from above the front door of the school and sanding our walkways and decks to prevent slips.

We carry out routine maintenance on all of our vehicles and do bi-annual vehicle inspections of our vehicles using a USDOT protocol for inspecting school vehicles and buses. We also research the quality and safety of each of our vehicles. We have vehicle incident sheets that faculty fill out when issues occur with vehicles so that the Facilities Manager can promptly deal with the problem. This ensures that the vehicles are in good working order and are safe for student transport. We train our faculty in proper/safe driving of our buses and trailers to make sure that they are driving the vehicles safely.

Inside our facility, we attend to general health and safety by doing an all-school daily cleaning. We also do preventive maintenance such as yearly checks of our heating system. We have tested air quality for radon, and installed a radon mitigation system.

Surveys indicate that 82% of faculty, 90% of parents, and 82% of students feel we do “well” or “very well” at giving appropriate priority to operating it buildings, equipment, and grounds in a safe manner.

**Question 72:** The school implements plans to effectively supervise and instruct students with attention to their safety.

*a. How does the school provide for the supervision of students, particularly during non-class times?*
Students are in the presence of faculty and staff at all times of the school day. During class times, the ratio of students to teaching staff may be as low as approximately 6:1, and is rarely ever higher than 15:1. This enables teachers to be easily cognizant of attendance and student safety. We call families if a student is absent and unaccounted for so that we can be sure of their whereabouts. Class time may involve students working outside of the class in other areas of the building or even outdoors; however, teachers are always nearby to supervise and instruct.

Students that leave in the middle of the day for any reason must have parent approval and report to the main office to sign out on a daily attendance log. Students arriving late must also sign in on the log. Attendance, tardies, and early departures are recorded for each student in our school data management system software. Emerging patterns of tardies or absences, particularly if not attributable to sickness or planned family events, will elicit a family conference in accordance with our Attendance Policy as described in the Family Handbook and possible loss of credit once the attendance exceeds 10% of the school year.

Non-class times include Wellness, lunch, clean-up time, and passing periods. All students are required to participate in Wellness unless excused due to illness or injury. If the student is unable to participate, they remain in a building where a faculty or staff member is present. All of our staff have First Aid training at a minimum, and most have had advanced instruction in health and safety. They are qualified to assess injuries, apply first aid, or determine when injuries require professional medical intervention. Students who are hurt during Wellness or field-related activities are assessed to determine the degree and seriousness of injury. The student may remain excused from Wellness or other school related activities to treat minor injuries or await parent pick-up if warranted. Faculty members fill out an Incident Report Form for all injuries occurring when a student is in our care. During faculty meetings, we review the forms to determine whether the accident could have been prevented and whether action is required to mitigate potential risk.

All students have lunch simultaneously. Designated teachers circulate throughout the buildings and exterior areas during lunch to supervise students and ensure that they are eating in preparation for Wellness, adhering to our no-technology lunch policy, and cleaning up after themselves. Students are not permitted to leave campus for lunch unless a parent signs them out.

At the end of the day, all students clean an assigned area to maintain the interior and exterior of the building and vehicles. The assigned cleaning groups rotate every two weeks so absence from the group is obvious to the supervising faculty. Group assignments are posted in the common hallway area so it is easy to locate a specific student if needed.

The main building of the campus has a semi-open floor plan with walls that do not reach all the way to the ceiling. This makes it possible to hear students and respond to activities/behaviors that may jeopardize student safety.

Occasionally, there may be students who arrive to school early or stay late pending parent pick-up. Rarely, a student or two may arrive early during an all-faculty meeting;
thus, the student is unsupervised until 15 minutes prior to the start of school. Parents are aware of this meeting time. In the afternoon, faculty members remain on the premises until the last student has left the school. 100% of the faculty and 96% of parents feel students are safe at school and on Field Studies. Surveys also indicate that 93% of students feel safe at school and on Field Studies.

b. What practices and procedures are in place to address the safety of off campus activities (e.g. outdoor/experiential education, field trips, international trips)?
The school has adopted risk management protocol specifically related to field activities and safety, which can be found on page 17 of the Risk Management Handbook (found in the Google Drive Folder). Further, faculty review important safety practices and policies prior to departure on Field Studies at the start of the year and at various faculty meetings during the year. Faculty practice and discuss various real life or fictitious scenarios to ensure best management.

When field trips include specific skills-based activities such as rock climbing, river rafting, fishing, etc., The Sage School retains professional certified guiding services to ensure that the activities occur safely.

The Sage School sends all of its graduating seniors on a capstone field trip to Ecuador, which was discussed in our Field Study review. Students stay in the homes of families that are known to our extended network in Ecuador. We are in the process of looking into third party options to vet these home stays. The school pays for trip insurance and evacuation insurance.

When polled, 74% of the parent body and 94% of the student body felt that The Sage School has sufficient and clear policies and procedures for the implementation of our field studies program.

Question 73: The school has written procedures to deal with health, accident, injury and illness.

a. What practices and procedures are in place to address health, accidents, and illness at school?
Our aim is to have a faculty that can be nimble and responsive to emergencies through a series of systems. On a basic level, we have procedures for how to respond to incidents such as a medical emergency. We discuss the protocols in the Risk Management Handbook. We also value effective and efficient faculty responses to medical and health emergencies that may not be covered by written procedures, as it is impossible to foresee every possible situation. For this reason, we have our faculty certified at various levels of wilderness medicine. All faculty members have at least a WFA certification and one teacher per band has WFR certification.

Should an incident arise, our Office Manager is our point-person to deal with health issues. Situations are reported to parents when appropriate and a follow up Incident Report Form is filled out. We also have extensive medical history on each student that parents update yearly in the fall and throughout the year if a student's health history has
changed. All significant medical issues are denoted on the medical forms through our data management system. The forms are disseminated to faculty so that they are aware.

Our surveys indicate that 100% of our faculty and 77% of parent feel that our school “does well” or “very well” at presenting our written policies and procedures that help us mitigate health problems, accidents, illness, and injury.

**b. What provisions are made for the health and accident/illness response during school sponsored events off campus?**

We have a whole series of procedures that are specifically directed toward off campus scenarios since we spend five weeks a year on Field Studies and are off campus weekly. At least three teachers are with each band of students during Field Studies. This is key so that we can send a faculty member with students needing evacuation and still have sufficient supervision with the remaining group. We also have specific protocols for evacuation of the whole group in the event of a backcountry emergency.

We take medical history and medication forms for each student and faculty member with us when we leave campus. We also carry first aid kits on all off-campus trips. Again, we have faculty qualified to administer care in the field at the WFA and WFR levels. We also identify the location of emergency medical facilities and services prior to departure on Field Studies trips. Maps of the locations and services are included in the field packet that faculty take with them on the road.

The Lead Teacher of each band functions as the lead administrator on each trip and responds in accordance to the procedures outlined in the Risk Management Handbook. This allows the Lead Teacher to make informed decisions in the event of an emergency. However, more serious situations such as evacuations may be beyond the ability of faculty, or may be less efficient, to respond to without assistance from a centralized ‘incident command person’ (i.e. Nancy Linscott). The Crisis Management Plan is being developed based on templates provided by NOLS, but adapted to our specific programming and operation.

Surveys indicate that 72% of parents, 91% of faculty and 87% of students feel that we do “well” or “very well” at documenting and communicating policies and procedures for the Field Studies program.

**Question 74:** The school has written emergency and crisis procedures and is prepared to implement them.

**a. How does the school plan for potential emergency situations, and how are these emergency management procedures evaluated and reviewed?**

For events on campus, we have aligned with the local school district to adopt a plan formed by an organization called ILoveUGuys.org. They publish Standard Response Protocol (SPR) materials, training procedures, and informational packets. We have adopted and practiced this protocol. This program aligns us with local authorities to form a unified response. Also, the program is clear, effective, and efficient for staff, students, and families to implement. We are working toward a comprehensive plan that will also
inform parents of our procedures. ILoveUGuys.org uses research to evaluate and update its procedures and we respond to their updates.

Our off-campus programs such as Field Studies have protocols outlined in our Risk Management Handbook. The protocols outline procedures for scenarios during backcountry trips that require evacuation, either individually or as a group. These protocols also specify that we hire professionals for activities that require more technical skills such as rock climbing, ropes courses, and rafting. Our audit provided additional guidance and recommendations to identify and manage risk in the field.

Survey results indicate that 69% of our parent body and 87% of our faculty believe we do “well” or “very well” at preparing for and implementing crisis management procedures when surveyed.

b. How are the purchase, storage, and rotation of emergency supply inventories managed?

The Health and Safety Manager takes inventory, purchases, and maintains our emergency supplies. We have recently developed a system where time is set aside in faculty meetings, under the Health and Safety Manager’s guidance, to go through the kits so that faculty stay familiar with the contents and keep them stocked. We have a storage closet in the basement that contains extra materials for resupply. Goods that expire are checked through this system and rotated as needed.

- What are the school’s overall strengths in regard to the area of health and safety?
  We have a strong culture of reviewing of incidents and discussing them during faculty meetings and other appropriate times. This process allows us to understand what happened during an incident, why it happened, and how we might mitigate risk in the future. We have clear and comprehensive training for faculty when it comes to medical training and review of overall risk management protocols. The size, organization and culture of our school make it easier for us to stop in the moment, discuss, and evaluate risk. We also have a strong understanding of the types of risk we are willing to in order to meet the mission of our school.

  Our risk management philosophy describes our tolerance of risk:
  A foundation of the school is that our students are safe when they are in our care. While we cannot remove all risks, we can manage them responsibly, and we can create an environment both inside of school, and wherever we take our students, that attends to their safety, health, and security…The foundation of our school is to have an educational environment that allows students to ‘Experience your education.’ To allow this culture to be vibrant and constructive for all students and staff we must create a culture that mitigates risk where and when possible.
  This statement helps manage risk with the mission in mind.

- What areas of growth and/or recommendations does the school make with regard to the area of health and safety?
  One of our major areas of refinement over the last year has been our response protocols around large campus incidents. As stated above we have adopted the protocol of ILoveUGuys.org. We adopted this program during the 2015-2016 school year and are still defining certain aspects of the protocol due to the open nature of our campus (i.e. finding a
space in the classrooms that is ‘out of sight’ of the windows). We need to drill more and need more communication with parents about why we are using this protocol and how they will interface with the school should their be a major incident such as an intruder on campus. As evidence of this, 12% of our faculty, 30% of our parents, and 6% of our student body feel our implementation of drills and incident response needs improvement.

We continue to refine our programs for training faculty in and around health and safety. For example there will be a school sponsored WFA/WFR-Recertification at the beginning of the 2016-2017 school year, which will continue to happen bi-annually. This will allow us to ensure that our faculty members are properly trained and current in their certification.

We have sent the Health and Safety Manager to the NOLS Wilderness Risk Management Conference and are working toward implementing many of the ideas gleaned during that week and from the independent review. We are also working to strengthen our partnerships with law enforcement agencies and local emergency planning committees to augment our ability to respond to emergencies. These are the areas we have identified as growth and are working towards their development.

Documents Provided (available in the Google Drive files):

- Safety policies and/or procedures
- Health policies and/or procedures
- Emergency response and crisis procedures
- Copy of external safety review of the school’s outdoor/wilderness program