

**Response Report to the Recommendations Provided in the  
PNAIS Visiting Team Report  
October 2007**

**Association Philosophy**

- 1. Redouble its efforts to recruit and retain faculty and staff of color. This is a difficult task given the location of the school, however, such efforts, if successful, will move the school forward even more than the good work it has already done. The voices of adults in the community who represent racial and ethnic diversity will breathe life into conversations about diversity and will create avenues for student growth that are impossible to attain in any other way.**

*Response: The Overlake School endorses this recommendation. This is an on-going effort that takes a combination of opportunity and effort. Historically we hire anywhere from 6 to 14 new employees annually. We continue to cast as wide a net as possible, and everyone involved in hiring and interviewing is committed to including diversity as a critical and important component. Progress in diversifying faculty and staff hiring has been slower than ideal, but it has been steady. We have done much better with the student body and membership on the Board of Trustees. The school is committed to increasing its efforts in this area, as diversity is important to all members of the school community.*

**Major Commendations/Recommendations**

- 1. Extend the extraordinary work it has done in living its mission and articulating it to the internal Overlake School community to the broader strategic communication and marketing of its distinctive identity. The Visiting Team believes this is one of the most important means for the school to address issues of increasing competition and articulate the value of an Overlake School education.**

**The Visiting Team encourages the school to engage in a comprehensive assessment of its current strategic and day-to-day communications and marketing with both external and internal school constituencies. The school has a great story to tell and is losing opportunities to market itself more effectively. Many significant issues facing the school could be better managed through improved marketing and communications:**

- a. **Articulation of the school's identity or brand, particularly the outcomes of an Overlake School education;**
- b. **The recruitment of mission appropriate students to fill the spaces anticipated in future enrollment growth of the school;**
- c. **The hiring of a diverse faculty and staff;**
- d. **The results of the school's thoughtful revision of its disciplinary policies;**
- e. **The design and construction of the planned Middle School Center;**

f. **The roll of annual fund raising in the life of the school;**

*Response: See Administrative Practices and Personnel #1*

2. **Clarify for the school community the philosophical foundation for the Middle School program. This will provide the basis for articulating both the identity and educational program for grades 5 through 8 and subsequently the design of the planned Middle School Center. It was clear to the Team that a lack of consensus exists in the school community about how best to define and develop the Middle School program. Much research on best practices for educating your adolescents is available to inform this process. This issue was identified in the 1992 and 2000 Visiting Team reports and resolution of the issue is essential if the school is to improve its already strong Middle School program and maintain its competitive advantage in the King County independent Middle School market.**

*Response: The philosophy of the middle school continues to be one of function and structure. We are a five through twelve campus and are physically integrated into a single environment. Despite the mix, students in the middle school see themselves as middle school students looking forward to moving into the upper school. In many cases, there is trepidation associated with this move even though the upper school is in the same building which houses the middle school. There is a separate identity between the upper school and middle school.*

*We have consciously created structures which separates the two divisions. The Middle School Associated Student Body operates independently of the upper school. Green and Gold is an activity program which is uniquely middle school. This years "finals week" is separate and different than the upper school week due to the different needs of younger adolescents.*

*The National Middle School Association has listed several recommendations for Middle Schools in a publication titled, "This We Believe." As a faculty we have considered those recommendations and developed our function as a middle school around them. Most importantly our instruction is age appropriate and targeted at middle school social, intellectual and moral growth.*

*We continue to evaluate the program and implement new function and structure which will benefit our students. A new schedule initiated this year is an example to provide students an open structure which provides more learning options.*

3. **Undertake a review of its administrative structure and staffing to assess the appropriateness of job descriptions for existing staff and the sufficiency of staffing to meet administrative needs. In its Self-Study, the school identified a concern about whether or not it has sufficient staffing to meet the growing administrative demands on the school. The Team suggests that staffing requirements be reviewed in light of current needs and needs that may result from implementation of the school's new strategic plan.**

*Response: The Administration strives to continually assess the adequacy of the administrative structure and staffing, to ensure that the school continues to meet its mission.*

*Since the Visiting Team's review we have added the following positions Administrative Support positions: 20% Sustainability Coordinator to assist the school's "Green Team" in project support, a six-month 50% Admissions Assistant to help with database input during the height of the admission season, and a 40% Project Week Coordinator, to assist teachers in Project Week planning. In 2009/10 we will also add Grade Level Advisory Team Leaders, in grades 5-12, to assist in the development of the advisory program.*

- 4. Continue its considerable efforts to meet the facilities needs required to support its program and operations, particularly in light of projected enrollment growth and an assessment of the current state of its facilities. The Team is aware that the school has completed a considerable amount of new construction since its last accreditation – a performing arts center, the art barn, a gymnasium and athletic/physical education support spaces, tennis courts, artificial turf playfield, and the faculty/staff parking lot. The Visiting Team is also aware that the school has developed a campus master plan to guide future improvements in its facilities. In addition to new spaces identified in the plan, the Visiting Team encourages the school to study how best to provide space for students to gather socially during free time, as they do now in the library.**

*Response: In early 2008 the school's Board of Trustees accepted the administration's recommendation to embark on a capital campaign to replace three current buildings and to remodel two existing spaces. These projects will provide state of the art facilities that address concerns about adequate and mission-appropriate spaces. The new facilities and remodeled spaces are:*

- 1) Humanities building for English and History, grades 7-12, started in June 2008 and completed in February 2009*
- 2) Technology/Language Center, grades 5-12, started in June 2009 and scheduled for completion in June 2010*
- 3) 5<sup>th</sup>/6<sup>th</sup> Grade Center, scheduled for construction in June 2010 and completion in June 2011*
- 4) Remodeling of the Library to provide an expanded computer lab, two group study rooms, and a re-designed Middle School area*
- 5) Expansion of the Campus Center to provide additional seating for Upper School lunch*
- 6) Conversion of 5<sup>th</sup> grade math/science classroom to a Middle School science lab*
- 7) Conversion of 5<sup>th</sup> grade English/history classroom to a Business Office/bookstore*

### **School Mission**

- 1. Review and revise as appropriate The Middle School Statement of Belief as part of the preparation for creating the new Middle School Center. This work will provide a basis for assessment of the Middle School program which should, in turn, inform the design for the new Center.**

*Response: The construction of a stand-alone Middle School building has been revised in favor of the new construction plan outlined in the previous question*

*It is still worthwhile to assess the current application of philosophy. It is not a building which creates philosophy or program but the philosophy and program which creates a building. The Statement of Belief continues to represent the whole child philosophy of the middle school. Our curricular and co-curricular program continues to balance and promote academic, social, emotional and physical growth.*

- 2. Find means of promoting the companion documents to the mission statement more broadly as a means of articulation the identity and values of the school.**

*Response: The companion documents to the Mission Statement are the Statement of Philosophy and the Essential Readings. The Statement of Philosophy is included in both divisional handbooks and is available on our website. The Essential Readings is a collection of school documents that includes the Statement of Philosophy. This is also available on our website. We will continue to look for ways to make these documents more prominent including highlighting them on our website and including the Statement of Philosophy in multiple school publications.*

### **Governance and Governing Body**

- 1. Review and revise as appropriate the composition of its Board of Trustees in light of its own definition of diversity. In this way the Board can respond to its commitment to embrace diversity at its highest level of leadership.**

*Response: In the last year, the Board has made a concerted effort to expand the diversity of Board membership. We have recruited several members who reflect the broad composition of the student body and who have diverse skill sets. The Board also developed a system for recruiting Board members by seeking to select Board members from those who have served on board committees or other school committees, such as the strategic planning committee. This ensures that we are recruiting from a pool of candidates who have some experience and knowledge in school affairs prior to joining the Board. This approach has been advertised to the school community to encourage those interested in Board service to join committees to gain experience, and to attract potential candidates who may not have otherwise considered Board service.*

- 2. Implement an annual process of Board self-evaluation that emphasizes both the quality of the Board operations and monitoring of strategic plan implementation. In this way, the Board will model the value of self-assessment for the school community, and it will assure that the strategic plan a living document guiding the school's future and its use of resources.**

*Response: The Board completes the PNAIS Board Evaluation form on an annual basis in the spring of each school year. The results are tabulated and reviewed by the Executive committee. The Chair then presents a summary of the results to the Board, with proposed action items to address any areas that fall below the PNAIS average. The Board has instituted a periodic review of the strategic plan, typically at the beginning of each school year. Much of the Board's role in the last three years has been concentrated on fundraising for the facilities portion of the plan. Last year, a new Humanities building was*

constructed, and a new Technology and Languages building is in progress, with a new 5/6th Center to come.

**3. Review and revise, as appropriate, the means by which the school leadership relates to and communicates with, parents, faculty and staff. By its own admission, the school needs to find a way to improve communications with parents in particular.**

*Response: The school's Board of Trustees is fully integrated into the life of the school. Their meetings are posted in the school calendar and announced in the weekly eBulletin and it is widely understood that parents are welcome to attend. Board meeting minutes are posted on OwlNet, the school's intranet. Each year an article titled, "Meet the Board", provides biographical data on each Board member and describes his or her role on the Board. The article also thanks and acknowledges those who have completed their terms. The school holds two evening community forums each year. The community forums are moderated by the parent association. Questions are collected in advance of the meeting and a panel of Board members and administrators is assembled to answer the questions and to take questions from the floor. This is an opportunity for every Overlake parent to voice his or her concerns and to ask questions of the school's leadership. The minutes of the community forums are posted on the school's intranet.*

*Most Board committees, both standing and ad hoc, are comprised of Board members, administrators, faculty, alumni and parents. Standing committees include Building and Grounds, Development, Diversity, Enrollment Management, Finance and Investment. Examples of ad hoc committees include various capital campaign committees, strategic planning, facilities master plan, education roundtables and event planning committees like the 40<sup>th</sup> anniversary and Founders' Day. The committee system introduces a continuous stream of volunteers, including parents, to the work of the Board and many of these volunteers go on to become Board members.*

*The composition of the Board also provides a flow of information back and forth between the school's leadership and its various constituent groups. The president of the parent association as well as the president of the alumni board serve on the Board of Trustees by virtue of their office. One of their primary roles is to convey information about the work of the Board back to their respective groups.*

*Board discussions and decisions are communicated to the school's administrative team by the Head of School during its weekly meeting. The Head of School also distributes a "Head's Memo" to all faculty and staff that updates them on a variety of topics including appropriate board and administrative actions.*

*Finally, all administrators, including the Head of School, have an open door policy and encourage parents and other constituents to contact them with their questions and concerns.*

## **Middle School Program**

- 1. Solidify the identity of its Middle School by reviewing the philosophical underpinnings of the Middle School followed by examining the program for fit with the philosophy as well as the mission of the school, and then followed by reviewing programmatic elements such as schedule and design of the Middle School Center.**

*Response: A middle school program can fall somewhere on a long continuum from true middle school values to using the term “middle school.” The point on that continuum of where a school falls depends on clientele, teaching staff and time allotment. We move around on that line in the overall program, at individual grade levels and as separate curricular programs. We consider it a good thing to be flexible and not get stuck in a “one size fits all” mode.*

*The middle school faculty continually examines, both formally and informally, how to meet the needs of middle school students through curriculum and co-curricular programs.*

- 2. Establish the appropriate job description for teachers who would be implementing any new program created as a result of the first recommendation.**

*Response: The Middle School Center plan has been revised. Regardless of a building plan we will continue to engage in dialogue and make the necessary changes which benefits students.*

- 3. Accelerate the implementation of any new elements of the Middle School program that are not facilities dependent, such as grade level team meetings to discuss student needs.**

*Response: We have implemented an “Advisory Team Leader” program. The purpose of this program is to coordinate activities per grade level. We have also implemented a new daily schedule which includes time for grade levels to meet.*

## **Upper School Program**

- 1. Investigate offering more interdisciplinary courses in order to enhance the current disciplinary integrity and high quality of its academic program. Several departments are motivated to pursue this type of collaboration.**

*Response: The idea of offering more interdisciplinary courses has been discussed in the Academic Council. Department Chairs are considering a variety of options for sharing information and collaborating on skills and content in their courses. There is limited support, however, for creating new interdisciplinary courses at this time.*

- 2. Document the scope and sequence of each academic department as it relates to the development of skills across the grade levels. While the team acknowledges that each department has already mapped out its curriculum, this effort could be extended to include the skills that students must acquire in order to be prepared for college and life beyond. Providing this kind of documentation will facilitate further collaboration within and between departments.**

*Response: Scope and sequence documents have been created that include both content and skills across grade levels for each course. These need to be updated and transferred into an electronic format for easier access and editing purposes.*

- 3. Update the curriculum map to reflect any recent changes in the school's curriculum. Such revisions will allow the school to better market its academic program to prospective families, potential donors, and interested community members.**

*Response: The Upper School curriculum map has been updated. It is now in an electronic format for easy updating and is available on our website.*

## **Arts**

- 1. Establish a forum for the discussion of philosophical principals, pedagogy and coordination of the department's combined skill areas (i.e. set design, theater use, budget allocations and scheduling conflicts). This needs to be set on a regular basis and attended by all. Collaborating on a consistent curriculum 5<sup>th</sup> – 12<sup>th</sup> grade (music, drama and visual arts sequences) to establish a progressive skill basis would avoid repetition within the scope and sequence of the department, and it would delineate a prerequisite skill/knowledge bases that faculty could anticipate from students. This curricular continuity should include textbooks, reference sources, repertoire, medium experience, technology, and performance background.**

*Response: The Arts department is committed to finding ways to stay connected and collaborative in our efforts to facilitate all disciplines under the umbrella of the arts. In the drama department we have scheduled weekly production meetings to discuss theater use, budget, set design, and room/class scheduling. These meetings are designed to implement our curriculum and meet our production needs. Through our meetings we handle logistics, artistic direction and communication within Overlake and the greater community. The music department schedules similar meetings to discuss concert programming and scheduling, opportunities to share resources, and professional development ideas. In both Visual and Performing Arts, faculty who teach the same core classes collaborate on content and assessment to create consistency for students completing arts requirements. As arts faculty, we have reviewed the curriculum map, discussed objectives and goals for various skill levels and grades 5-12 in order to challenge all students' growth and to meet the sequential demands of the scope and sequence of our curriculum. Although not in the current schedule yet, the possibility of more department meeting opportunities within our new schedule opens the door to more consistent discussion of curricular issues and the scope and sequence of each sub-department (art, music, drama).*

- 2. Define the areas of responsibility between the Building Manager and the Technical Theater Director of the Fulton Theater. Clarification of this space as primarily classroom space as well as a multi-use facility is needed, including, but no limited to: the effects of outside presentations on class time, cleaning/maintenance schedules and expectations for visitors on appropriate treatment of the facility.**

*Response: The position of Building Manager has been eliminated and the position of Technical Director of the Theater has been turned into a 1:1 FTE. This new position oversees all activities in the theater, including classroom use, production use, outreach, and maintenance. Resources such as time and funding allow for more supervision, planning, and coordination with Overlake & community partners who hold events in this facility. The Technical Director serves as liaison to all users of the theater, as well as a point person for building use within the Overlake community. "Audience education" has been key this year as we strive to help the faculty and staff members understand protocol and procedures when using the theater for meetings, speakers, or special events.*

- 3. Support the Arts department's expressed desire to work on inter-disciplinary projects with other departments. The school had a tradition of History Festivals and Oral Tradition Festivals that involve collaboration of the arts with the history and language departments in the past. Coordination of these projects could be aligned with the co-curricular credit program already in place.**

*Response: The Arts department has always been interested in collaboration and idea sharing with other departments. In addition to the aforementioned History Festivals, our department has offered support to a number of other departments in the realm of facility needs, technology support, and faculty support for special projects (i.e. the Latin mythology projects use of our theater, costumes, and teachers, or the English department's use of our facility for the Writer's Symposium and various resources in their study of Shakespeare presentations. Most recently, our department has supported an AP Art History class as part of our program, and this course is taught by an English teacher. Dance Workshop is a course currently being offered that can be taken for Art or PE credit (and therefore meets both Arts and Physical Education goals). Visual art electives such as Graphic Design, Digital Photography, and Video Production utilize technology and work collaboratively with the Technology Department as a resource. The Drama Department conducts outreach during school productions through pre & post-show discussions with Middle School students and faculty. All of these help to bridge the gap between Arts and other departments and keep the arts vital and visible in many areas of our community. There are unlimited avenues with which to integrate different mediums of art or core academic subjects within the study of performing and visual arts. We welcome any and all collaboration opportunities.*

## **Athletics**

- 1. Develop a means to resolve issues of athletic facility upkeep among maintenance/janitorial athletic and physical education staff members.**

*Response: A member of the Maintenance Department is assigned to set the pre-game gym for all volleyball and basketball contests. John Wiley, Athletic Director, hired a Basketball Facilities Manager who is responsible to both assist with set-up and restore the "game gym" to the "classroom gym" following every JV/Varsity contest during the basketball season. The Janitorial Crew then takes care of the regular clean-up of the locker rooms, lobby, restrooms, and weight room and handles all garbage, sweeps, and mops. Any spills in the gym are cleaned/mopped up as well. Every morning before school starts a member of the*

Maintenance Department double checks the gym areas to insure that they are ready for classes. The Physical Education Department has seen a big improvement in the readiness of the new gym for morning classes over the last two years.

## **English**

### **1. Provide more opportunities for student-to-student interaction within the classroom, particularly at the Upper School level.**

*Response:* The English department feels that opportunities for student-to-student interaction are inconsistent. Often, we provide a good amount of student-to-student interaction, particularly when working with dramatic texts. Students in 9<sup>th</sup> grade perform extensively from Macbeth, and students in 10<sup>th</sup> grade perform the entirety of Othello as a class. In addition, lessons in every course include group work and partner work. However, some teachers report a desire to improve in this arena. The Middle School English department is proud of the work they are already doing in this arena. For example, the 6<sup>th</sup> and 8<sup>th</sup> grade English courses explicitly teach how to have a literary seminar discussion as a way to get the students talking to each other rather than to the teacher.

In some cases, changes have already led to improvements in this area. In the revised 12<sup>th</sup> grade Literature and Film elective, students have cumulative group film production projects. We have also revised the 10<sup>th</sup> grade English curriculum and added writing group and writing workshop as a central component of the course.

However, we are open to the idea that the amount of student-to-student interaction may not be enough, and are open to new pedagogies. As a department, we are looking for ways to do this and feel that we may need the support of the school in terms of time, money, or referrals to make this happen. In particular, it would be useful to have time set aside to do visitations and see what other student-to-student activities teachers are using successfully.

### **2. Document the scope and sequence of skills taught in the English curriculum. Although the department has already mapped out its curriculum, this effort could be extended to include the development of skills across grade levels. In particular, the department should consider the scope and sequence of the research projects conducted at grades 9, 10, and 12. At present, these projects focus on writing and research skills and do not include an oral presentation component.**

*Response:* The English department held a day-long series of meetings during the October 10, 2008 professional development day which included a discussion of the scope and sequence of writing skills across grades.

In the Upper School, the department hopes to build on this discussion by continuing the discussion through contiguous sets of grades; in summer of 2008, teachers spent a week retooling 9<sup>th</sup> and 10<sup>th</sup> grade English to minimize overlap with the support of professional development funds from the school. In the summer of 2009, teachers will extend this work through 11<sup>th</sup> and 12<sup>th</sup> grade.

*In the Middle School, teachers agree that it would be useful to articulate a scope and sequence for where students should be at the end of the year. However, because we have so many new students at each grade level – particularly in 6<sup>th</sup> grade – it makes it hard for each teacher to count on the skills mapped out for the grade below. Here, discussion continues about the best venue for determining scope and sequence. Teachers do not feel that lunchtime meetings offer sufficient time for reflection. Teachers are considering a proposal to find time during the summer to work on this.*

- 3. Review staffing requirements at the Upper School level to assess whether there are inequities that negatively impact programming. Particular consideration should be given to the number of teacher preps per faculty member.**

*Response: The English Department strongly believes that an ideal course load for an English teacher is four courses, possibly including an additional duty. Because the English course load includes an unusual amount of nightly grading, we feel that teaching five English courses makes responsible, thorough, timely feedback difficult if not impossible. Having three or more preps makes this even more difficult, since it increases the amount of nightly work in competition with grading.*

*Since that decision is out of our hands, we have worked to reduce the number of preps in the English department to two; as of this year, we have reduced the number of preps to 2.5 (with all teachers working primarily in the English department teaching 2). This will continue to be a consideration when assigning course loads. In some cases, we have achieved this by simplifying course offerings and offering multiple sections of the same prep in the 11<sup>th</sup> and 12<sup>th</sup> grade English program. Next year, the number of preps should be down to a uniform two.*

## **Library**

- 1. Librarians have a role in each division to ensure that both Middle and Upper divisions are served equally. Further, review the impact on library services if each librarian led advisor groups, one from each division.**

*Response: The librarians recognize the desirability of each leading an advisor group from a different division, and recommend that that occurs during the 2011-2012 school year instead of in 2010-11. Deferring the change one year will provide stability to the sixth grade team, as in 2010-2011 there will be two new sixth grade teachers, four students added to a class that already increased in size this year, and a new schedule. Therefore it was decided that one librarian would remain a Middle School advisor next year to minimize further changes to the class. In 2011-2012, one librarian will become an Upper School advisor and the second librarian will become a 6<sup>th</sup> grade advisor.*

- 2. Continue developing the Library Scope and Sequence to ensure that it is an integral part of the school's curriculum and a point of reference for refining the library goals at each grade level. The process will assist in answering the critical question: What are essential skills that should be taught at each grade level to grade information literate students.**

*Response: The librarians recognize the need to continue to develop the Library Scope and Sequence. In order for Library's Scope and Sequences to become an integral part of the school's curriculum, a major shift will need to take place. Faculty will need to give the librarians the time needed to teach an expanded library curriculum. The librarians will also need to become active partners in planning and implementing curriculum and assignments. We provide excellent service, as stated in this report, but often the service is reactive. The librarians are not always active partners in planning.*

## **Mathematics**

- 1. Work to resolve the confusion between grades 5/6 and grades 7-12 with regards to consistency and continuity in the math program. While there is no evidence that the current 5/6 program is a detriment to student learning, a discussion should be undertaken to articulate goals for the middle school program versus the high school math program and determine if seat time needs to be revised.**

*Response: Three major steps have been taken to address the recommendation. First, the 6<sup>th</sup> grade program was revised to allow for a dedicated math period and a substantial increase in dedicated seat time for math. A mixed-use math/science period was sometimes used for science projects taking several consecutive class periods to accomplish. During these times math was generally not practiced. The reverse was true during "math weeks". The new daily math class prevents this erosion of seat time in either direction and allows each teacher to concentrate on one field of study rather than two. Secondly, a 6<sup>th</sup> grade math core textbook was adopted in order to make the transition from 6<sup>th</sup> to 7<sup>th</sup> grade less abrupt and to consolidate students' resources. In the Upper School, students use their textbooks and their teachers as their primary resources. Adoption of a solid and traditional 6<sup>th</sup> grade textbook creates a 6<sup>th</sup> grade experience more similar to the 7<sup>th</sup> grade experience. While 5<sup>th</sup> grade still uses multiple resources, the common schedule and close communication between the 5<sup>th</sup> and 6<sup>th</sup> grade teams helps to make the transition from 5<sup>th</sup> to 6<sup>th</sup> grade a non-issue. Finally, a new math teacher was hired, releasing the previous math/science teacher to concentrate solely in his field of expertise and allowing the math teaching position to be just that. The new teacher has also assumed responsibility for the Middle School math teams, creating continuity with the Upper School's competition program. The Middle School math teachers (5<sup>th</sup> – 8<sup>th</sup>) have been encouraged to continue holding meetings, to continue to examine curriculum, to share best practices, and to work together regarding the timing of each student's placement into algebra.*

## **Modern & Classic Languages**

- 1. Seek means to allow any new student entering grades 8<sup>th</sup>-12<sup>th</sup> or continuing Upper School students to start any of the languages offered by the Modern and Classic Languages Department in any given year. The options of starting a new language are limited and weaken the department's capacity to meet students' interest. The department's graduation requirements call for three years of one language or two years of one and two years of another. The latter is not possible given the current structure of the program.**

*Response: The Modern and Classical Languages Department continues to support the department's requirements calling for three years of one language through level IV with a minimum of two years in the Upper School, or two years of two languages. Under the current system at least two languages end up by being offered at level one in the Upper School. As much as the department would like to offer all five languages at level one in the Upper School, the department also realizes that it would not be economically feasible for the school to offer a class with less than 6 students. In any case this decision remains an administrative decision not a departmental one.*

- 2. Review upper level courses offered in Spanish and French (III, IV Advanced Conversation, IV AP Language, V AP Literature, V French, and V Advanced Spanish Conversation) with an eye to reducing the number of electives and independent study offerings. The main focus of these courses is standardized test preparation, jeopardizing achievement of the goals articulated by the department's self-study report. Opportunities for conversation about ethics, morals, and character development, as well as the promotion of free and open inquiry are reduced.**

*Response: The AP classes and the upper level courses starting with level III, including electives up to level V, offered at the Overlake school are an inherent part of the language program and are building blocks towards the proficiency goal articulated by the department. Following are some of the reasons these classes cannot be reduced nor eliminated:*

*a) There are several students at the Overlake School who wish to take the AP language and literature classes with the goal of pursuing challenging classes and comparing their language proficiency and literal analysis skills in relation to other students all over the nation. Some of these students also opt to take the AP classes in order to meet the college requirements for some language classes, thus saving time and money in college. There is an equally high number of students at the Overlake school who wish to continue at a high level of the language seeking electives without taking the AP test. In order to accommodate the different needs and desires of the students at the Overlake school, the language department will continue to offer these different electives at a higher level.*

*b) Members of the language department are convinced that the AP exams and national exams do not go against the goals of the department, but rather serve as an additional tool to better help assess these goals. The AP exam help assess the level of proficiency of the students in comparison to the rest of the nation in all the different areas of language acquisition: listening and reading comprehension, oral and written communication, and cultural and linguistic fitting. The advanced classes also encourage students to think on a more abstract level and to develop the ability to synthesize information.*

*c) The content and the methodology of the intermediate and advanced level courses, levels III, IV, V, Advanced Conversation and AP classes do not teach to the standardized tests, rather, they are totally focused on the goals articulated by the department. In class students are encouraged to communicate, maximally by communicating in small groups as much as possible, and applying authentic and free communication by using themes related to the students' lives, interests, and values in accordance with the school philosophy, as well as providing a setting which encourages free inquiry. In any case, even though teachers are*

*encouraged to give the national exams to their students, the final decision is left up to the discretion of the teacher. These national exams when chosen to be administered to students serve as an additional tool for assessing the students' proficiency in listening and reading comprehension as well as written proficiency, in comparison with the rest of the nation. This would be in accordance with and not against the stated department goals of assessing proficiency in communication.*

*d) Teachers who chose to use the national exams as an additional tool for assessment, in no way teach to these tests as there are no ways to drill the students to help them be successful on these tests. In Spanish, for example, there is only one sample test online which lasts a couple of minutes.*

*e) With the new change of introducing languages in the 6<sup>th</sup> grade level, the Overlake students will even be more proficient in the language.*

*In summary, members of the Modern and Classical Department, consider that the current language program at the Overlake school is successful in that it meets very well the articulated goals of the department. For all the above mentioned reasons, the language department has no intention at the present time of changing the availability or the nature of the classes offered at the Overlake school and is planning to continue giving the national examinations and the AP tests. Next spring, the Overlake school will invite a much respected authority in the field of language acquisition to audit the department. This will give the department another opportunity to review its goals and their implementations. Any suggestions given by this authority in the field of language acquisition will be carefully reviewed.*

## **Physical Education**

- 1. Develop a means to resolve issues of athletic facility upkeep among maintenance/janitorial athletic and physical education staff members.**

*Response: See response to Recommendation 1. under Athletics.*

- 2. Supply PE staff with a list of medical conditions for students who may have symptoms that may appear due to exercise or the environment. It is important for teachers to know who has allergic reactions, asthma, diabetes, or other conditions that may arise in a physical education setting.**

*Response: The Physical Education Department has a complete set of student emergency release forms in both the field house, the Department Heads office, and the new gym, the athletic office. We also receive a list specific to allergies and medical conditions for students which the Department Head shares with the PE staff. In the fall of 2008 Overlake added a full-time Athletic Trainer who is on campus daily. He is a ready source of help and information regarding student health issues and works daily with coaches and students in evaluating injuries, and provides both acute and on-going treatment for common athletic injuries.*

- 3. Address the impact of non athletic/physical education use of physical education facilities on class time. Special attention should be given to minimizing loss of physical education class time.**

*Response:* The Department Head met with the Head of School to discuss this issue. Since our evaluation several new events/activities were scheduled in the field house and/or the gym. The Head clarified the process for event planning that requires classroom space. All facilities serve the needs of the school. There is a process to be followed and a facility use form must be filled out and sent to all parties concerned. All alternatives are to be examined before the decision is made to move students for the sake of another function. The Head of School was unaware of the number and type of requests that are made for the gymnasium space. He suggested that the PE Department Head ask the Middle School and Upper School Heads to oversee any requests for space so that they are fully aware of the quantity and nature of requests that impact the students and curriculum. The maintenance department has been consistent in checking with the Physical Education Department to clarify the class schedule and find the best “mutually beneficial time” to begin set up for planned events. The new facilities currently under construction should help reduce the number of requests for the “large space in the gymnasiums.” Within the next two years the new Technology Learning Center will have a student center that is designed to accommodate 70+ students at a time and the new Humanities Building will have a double classroom that may be able to accommodate more testing needs. The Campus Center will be expanded to accommodate 350 and should eliminate the need to hold the holiday banquet in the Field House.

- 4. Address potential physical hazards in the field house, especially the need to pad or cover cranks used to raise basketball hoops and the projecting parts of the walls.**

*Response:* These issues were taken care of immediately. The padding for the down braces in the Field House was re-installed and protective boxes were constructed around the cranks to protect students.

### **Service Learning**

- 1. Provide a budget to support the Service Learning Program.**

*Response:* A budget of \$7200 has been established to support the Service Learning program. Funds have been allocated for Service Day transportation expenses, related education program fees, and monthly meal dinner service at Avondale Park Transitional Housing facility served by Overlake students, faculty, staff and administrators. Additionally, funds have been allocated to support the student-led Community Service Club, providing funding for club activities and supplies. The results of increased funding include elimination of use of private vehicles for transporting students to Service Day activities, increased participation in education programs that correspond with the Service Day themes and increased student participation in Community Service Club activities.

## Social Studies

- 1. Enter into sustained, department-wide discussions that explore pedagogy and what, in a post-AP curriculum, excellence in teaching history means for the Social Studies department as a whole.**

*Response: The department agrees that it should review its goals every year and have systematic discussions of pedagogy on an ongoing basis.*

- 2. Develop institutional structures beyond ad-hoc meetings that support and foster collaboration *within* grade levels in the Social Studies program. Without sacrificing teacher creativity, teachers of core courses offered by multiple faculty members might explore areas of intersection and commonality in their courses, working together on projects and assessments in order to provide greater coherence and consistency to students across sections.**

*Response: There are currently 4 core courses in the 7<sup>th</sup> – 11<sup>th</sup> grade social studies sequence that are taught by more than one teacher. Those courses are 8<sup>th</sup> Grade History, World History 9, World History 10, and Honors United States History. Teachers in each of those classes would like to have more time to discuss pedagogy and plan common projects and assessments. The new schedule in 2009/10 will allow for Wednesday morning meetings for teachers to meet by departments. Because of the five-course load faculty members teaching the same classes do not always share free blocks. Consequently, in any given year whether teachers have common planning time to engage in systematic collaboration is largely a matter of the schedule.*

- 3. Set up a clearly articulated plan for a review and rotation of Social Studies program elective offerings, the incorporation of new electives, and decision making about who offers those electives.**

*Response: The department is setting up a regular rotation among teachers who wish to teach Upper School social studies electives. In addition, at the end of each year we will review our electives in order to decide whether any currently existing classes should be dropped and new ones should be added to the curriculum.*

## Administrative Practice & Personnel

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

*Response: In the spring of 2008, Overlake hired a Seattle public relations, design and marketing firm—Belyea—to develop a marketing and public relations strategy to be integrated into all of the school's print and electronic communications. Belyea reviewed all of Overlake's print and electronic materials and those of comparable area schools; tested community opinion about the school; conducted two focus groups of teachers, administrators and parents and surveyed all parents and students. Based on their research, Belyea created a new and exciting look and a position platform and key marketing messages that were*

*incorporated into a new admissions brochure available for the 2008-09 admission season. In 2008-09, the school's print communications were re-designed to reflect the new look and messaging and the school's website was completely rebuilt and launched. The final implementation step will be the redesign of the school's intranet, OwlNet, which will take place in the fall of 2009.*

**2. Develop and implement a system for faculty and staff to provide input regarding their supervisor's performance.**

*Response: In the spring of 2008, faculty and staff had the opportunity to provide feedback about the performance of administrators. A questionnaire was developed with input from each member of the Administrative Team (Head of School, Business Manager, Director of Admissions, Director of Development and Communications, Middle and Upper School Heads, Upper School Dean of Students, Director of Counseling and Advising and Director of Diversity). The anonymous questionnaire, which also had a section for comments, was distributed to all faculty and staff and the responses tabulated.*

*The Head of School then met with each administrator and reviewed the responses relevant to his or her areas of responsibility and developed a plan to address concerns. In turn, administrators shared their department results with their staff and brainstormed strategies to address any concerns or misinformation about the work of their departments.*

*After reviewing the effectiveness of the process, the Administrative Team decided to repeat the evaluation in the spring of 2009 and to add a section of the questionnaire that assessed the performance of the Administrative Team as a whole. The team then reviewed the responses, which were generally positive. One theme that emerged was the perception that the administrators don't spend enough time with students or in classrooms. As a result, each administrator will visit classes twice each month for the 2009-10 school year.*

*Moving forward, the performance evaluation questionnaire will be used every other year.*

## **Development & Community Relations**

- 1. Establish a holistic marketing and communications effort to benefit both internal and targeted external audiences. Overlake has a tremendous opportunity to stake its claim in the marketplace. The school's "product" is top quality, yet the "brand" is muffled. Given the two key facts that Overlake is faced with increased competition for enrollment and a planned, ambitious capital campaign, there appears to be a significant need to establish an integrated marketing approach for Overlake School. When adopted and implemented, this effort would provide significant and much needed comprehensive support for admissions, development and administration. Please see suggestions below.**

*Response: See Administrative Practices and Personnel #1*

- 2. Clarify and delineate the roles of individuals within the development team. While the team understands the need for additional staff articulated in the Self Study, the team recommends that the Director of Development assess priority fundraising needs with current job descriptions. There is a good deal of duplication of responsibilities within the department on lower return activities and a need for increased activities on higher return fundraising. Please see suggestions below.**

*Response: Overlake's development office is small: a full-time director who also serves as director of communications; a full-time assistant director who manages the annual fund, a full-time capital campaign coordinator (a three-year position) and a full-time person who is .5 alumni director and .5 data base manager. The receptionist assists with data input on a limited basis. Current job descriptions reflect this division of labor as does annual performance reviews. As of 2008-09, the school is using new and integrated software for development, admission and registrar, Senior Systems, which has helped to eliminate most duplication of effort.*

*In an environment of competing needs, it is unlikely that the development office will have any additional staffing, so for the time being, current staff will continue to be responsible for a certain level of "lower return activities."*

- 3. Reexamine the nature of The Overlake School's annual fundraising efforts. Based upon significant success in the areas of capital and endowment fundraising over the past decade, the team believes Overlake is ready to raise its fundraising standards and set more aggressive financial targets for annual giving. While dollars have increased steadily over the past fifteen years, the inflation adjusted increase in the annual fund as a percent of total budget has been somewhat flat (from 2.9% to 4.3% of total operation expense between 1992-2007). As per PNAIS benchmarking statistics, the medium to high benchmarks for annual giving in PNAIS schools as a percentage of total operating expense is 5.7% to 13.9%.**

*Response: Since 1995, Overlake has raised almost \$30 million for capital projects, endowment and annual giving. Two capital campaigns for \$8 million each and the school's current campaign for \$15 million have accounted for much of those funds. The efforts of the Board, the Development Committee and the development office have been largely focused on these three campaigns. It is also noteworthy that the school's annual fund continued to increase every year during these campaigns except 2008-09 which reflects both the activity of the capital campaign and the state of the economy. And even in 2008-09, actual annual fund was 120% of the budgeted amount and unrestricted contributions totaled 7.2% of the operating expense.*

*This recommendation was made in the fall of 2007 as the school was embarking on its current campaign and before the recession was fully underway. This building campaign completes the school's ten-year facilities master plan and campaign pledges are being made over three to five years so it is unlikely that another major capital campaign will be mounted for some years. The current campaign will run through the 2010-11 school year. When the*

*campaign is finished, fundraising priorities will shift to increasing annual fund contributions and the addition of a major gifts program.*

### **Students – Advising & Counseling**

- 1. Improve the quality and use of homeroom time by reducing the number of meeting times, increasing the amount of time allotted to each meeting, and using the time for activities and reflections relevant to the personal and social development of students, prepared and facilitated by the Advising and Counseling staff.**

*Response: The School has successfully embarked on a year-long project to alter the schedule to accommodate time slots devoted to extra help, club time, an extended homeroom advisory period, and a new time slot for a variety of personal/social development topics to be addressed in “Community Time.” The intent of the new schedule will be clearly defined for both teachers and students at the beginning of and throughout the 2009-10 school year. Such delineation will facilitate implementation of a plan to promote students’ development by using the extended homeroom time to discuss issues that are identified as important this year. Recent identified issues relate to skills of social responsibility and accountability, being good citizens both on the Overlake campus and in the broader community—by demonstrating concern and empathy for classmates and others, and embracing diversity. As members of the Counseling and Advising staff, our plan is to work more closely with the newly designated Advisory Team Leaders to implement the curriculum that promotes the personal and social development of all students in the Middle and Upper Schools.*

- 2. Establish collaboration between College Counseling and faculty advisors during pre-registration so that all information affecting student placement in classes is considered.**

*Response: Overlake’s Academic Advising program has significantly grown in the last few years. Counselors and the Upper School Head serve as Grade Level Deans to provide Upper School students with additional guidance regarding academic planning and course selection based on each student’s interests, abilities and college aspirations. As such, they meet with all students in a particular grade for pre-registration advising each year. In preparation for student registration meetings, the Deans will meet with members of each academic department for information about new courses and requirements. Likewise, the Deans will share with the faculty updated information about college expectations for college admission. As the Deans’ role in this area has increased, the role of Homeroom Advisor has gradually shifted away from that of academic advisor for pre-registration. Rather, they serve to ensure that their advisees are doing what is needed to complete the registration process in a timely and complete fashion.*

- 3. Develop a formalized plan that strengthens the process of consistent and timely follow up for students with special needs.**

*Response: The Learning Resource Specialist (LRS), in collaboration with the Upper School Head and members of the Counseling & Advising Department, has spent considerable time this year enhancing the 504 Plan Protocol for effectively serving special needs students. This*

*new process begins with pre-admission identification of students with special needs. Along with the offer of admission letter, the LRS provides an explanation of the 504 Plan process, a list of accommodations that Overlake can offer their child based on the documentation recommendations, and a section where the parents indicate their preference as to whether they would like their child to be on a 504 Plan. If the parents indicate they would like a 504 Plan in place for the upcoming school year, the LRS contacts them to start the process of developing a 504 Plan draft. Once the draft is complete, the LRS meets with the student, parents and/or school personnel to finalize the 504 Plan. The appropriate teachers are notified of the plan before classes resume for the new school year. A more detailed list of steps to be taken will be submitted for inclusion in the School Handbooks so that families are aware of the process prior to admission.*

*At the start of the school year, the Division Heads and LRS will meet with teachers to discuss all students on 504 Plans and any special circumstances related to students that they should be aware of. Thereafter, regularly scheduled Grade Level Meetings comprised of teachers, advisors, counselors, LRS and Division Heads will be scheduled to monitor the progress of students at each grade level. The LRS will also meet quarterly with students who have 504 Plans, evaluating and adjusting accommodations, as necessary. The 504 Plan is reviewed and revised annually and distributed to the student's teachers and advisor prior to the start of the school year or when the student changes classes at the end of a quarter/semester.*

### **Students Co-Curriculum**

#### **1. Establish a process to evaluate the quality and viability of clubs for the purposes of granting credit.**

*Response: We are taking several steps to address the above recommendation:*

- We are redefining our application process, so that clubs specify the meeting dates as well as the criterion that is associated with each club. This is intended to create a situation where kids are informed before they sign up and are able to make good decisions about joining a club.*
- We have redesigned our schedule to allow for club time that does not conflict with other activities.*
- We have plans to institute a club advisory guide that will include things like evaluation procedures as well as logistical help for any student or adult that is starting and running a club.*
- We are not allowing kids to join more than two clubs per semester which will limit the amount of commitments that students can make and boost the viability of the clubs that they do choose to join.*
- Only students that meet the criterion of the club that they join will be able to get credit, and only clubs that have an advisor and meet the Overlake criterion will be able to advertise their club at the club fair.*

#### **2. Assess the outdoor activities through a formal evaluation process in order to provide information that could enhance the experience of students.**

*Response: The Director of Outdoor Education is developing a survey that all students will fill out after participating on an outdoor trip. This information will then be used to improve the trips and to insure that the trips meet the goals of the students. Each trip leader also has a Trip Form to fill out after each outdoor trip to provide comments and feedback on the trip, the gear, the students, the activity and the location.*

## **Enrollment Management**

- 1. Review its Financial Aid policy in light of the mission to “Embrace Diversity.” The 7.5% cap and the limit on total aid to 90% of need may be insufficient to successfully achieve this aspect of the school’s mission. An annual review of this strategic goal may be necessary.**

*Response: In the Spring of 2007, The Malone Family Foundation awarded The Overlake School a \$2 million gift used to establish an endowment to support a total of 4-6 Malone Scholars each year. Overlake students who wish to be considered for a Malone Scholarship must be entering grades 7 through 12, academically strong and qualify for between 30% and 100% of tuition in financial aid (FA) funds based on our current guidelines. In 2008 – 2009, we awarded four Malone Scholarships. This freed up budgeted FA funds and allowed us to offer higher awards to more qualified students.*

*During the 2008-2009 school year, the FA budget was able to cover 95% of each student’s calculated financial need. This was an increase over the percentage awarded during all previous years. The FA budget remains benchmarked at 7.5% of tuition revenue but a small contingency fund was established to supplement our FA budget and allow some flexibility when allocating financial aid.*

*The past year has presented challenges to our FA program. Requests for aid increased significantly. Many more of our full tuition-paying families returning for the 2009 – 2010 school year applied and qualified for financial aid. In order to meet their needs and reserve funds for new students applying for aid, we reduced the limit on total aid back down to 85 % of need. We attempted to strike a balance between supporting returning students and new students when both had an increased need for FA funding. Given our funding limitations, and our desire to support our currently enrolled students, our ability to enroll a socio-economically diverse pool of incoming students became more difficult.*

*We continue to review our FA policies and practices with socio-economic diversity and access to enrollment in mind. The economic turmoil of the past year has affected the new reality of managing financial aid and we are determined to adjust and react effectively to future challenges and opportunities.*

- 2. Given the changing admissions landscape in eastern King County and increased competition for students throughout the region, assess the need for a more unified, cohesive and comprehensive marketing plan.**

*Response: In the fall of 2007, The Overlake School requested proposals from several educational consultant firms to assist us with a review of our branding and marketing.*

*By January 2008, Belyea and Associates was selected and began work on the project. During the next six months three discovery sessions were held, online surveys offered to Overlake parents, faculty and students, and a competitor review of 14 area competitor schools was conducted. As a result, brand attributes and brand messages were developed and tailored to address the identified needs of each target audience (parents, students, community). In addition, a positioning statement was created summarizing Overlake's unique position within the world of Eastside prep schools.*

*Belyea also assisted with the creation of a 12 page brochure/view booklet, designed an open house invitation postcard subsequently mailed to 15,000 selected households, and redesigned the main pages of our website. Each of these efforts was very well received by our respective audiences.*

*One area needing continued integration is combining the development/communication department advertising and marketing expenditures with that of the admissions office. Ideally, print and radio advertising as well as representation at local educational fairs and direct mailing costs would be included on one list of advertising and marketing efforts. Developing one comprehensive list enables us to present a more unified and accurate accounting of where and when we advertise, who our targeted audiences are and what the cost is to do so.*

*We are pleased, given our various advertising, marketing, recruitment and retention efforts, to report that admissions exceeded the targeted enrollment number for the 2009-10 academic year. While our attrition increased slightly over the previous year, we are currently at 5% which is below the NAIS (9.5%) and PNAIS (11%) averages for day schools.*

*That said, we do not take our standing for granted and are aware of the concerted on-going effort needed to retain our place within the greater Seattle-eastside metro independent school market.*

## **School Plant**

- 1. Establish a committee to review the scheduling of events and class activities in order to minimize scheduling conflicts. Such a committee should include the individuals to directly responsible for the educational spaces and for the operational support of such spaces.**

*Response: The school will put together a committee to discuss how events are scheduled with the parties responsible for each of the areas where meetings are held on campus. Goals of this committee will be to determine the best way for each space to be schedule along with determining what times each facility is available for use outside of the normal educational uses for the facility. The committee will also focus on determining if a different software package would for more efficiently for scheduling all campus events.*

- 2. Upon completion of the long-term maintenance plan being developed by an outside consultant, implement a system to insure that the plan is systematically updated so that it becomes an ongoing tracking system to support long-term operational planning.**

*Response:* Once completed the long-term maintenance plan will be updated annually and used as part of the budgeting process to determine operational projects for each year identified in the plan. With this document being updated annually all items related to the plan will be verified each year and adjusted accordingly within the document to ensure proper planning in the annual operational budget.

## **Health and Safety**

- 1. Develop a schedule for periodic training of safety classes such as CPR, first aid and Epi-pin use for faculty, coaches, and staff as the administration believes appropriate. Implement a method to centrally track the completion and expiration of this training.**

*Response:* CPR and first aid classes which include Epi-pin training are offered at least three times a year at Overlake at the start of each new sport season. It is required that all coaches have this training, and many of the coaches are also members of the faculty and staff. All other faculty and staff are encouraged to take this class. The Safety Committee is looking into ways to increase the numbers of faculty and staff with this training. A spreadsheet has been created to track each faculty, staff, and coach's completion and expiration of this training.

- 2. Given the current circumstance of hallways and entrance areas littered throughout the day with student backpacks, develop a means of storing backpacks more effectively. In the event of an emergency, a safe and clear means of egress will facilitate the evacuation of building occupants, as well as provide emergency response personnel safe passage to**

*Response:* The buildings on campus in which the space for students to store backpacks is limited. As new buildings have been designed areas for backpacks are identified.

## **Finance**

- 3. Allocate and track the investment earnings generated by endowment gifts designated for specific programs. This will insure the purchasing power of the designated gift in perpetuity.**

*Response:* The school is currently working with our auditors to implement the new UPMIFA legislation. This legislation requires specific handling of endowment funds. Our goal is to address the tracking and allocating of the endowment gifts designated for specific programs along with other UPMIFA requirement.