

Guidelines for Schools

Self-Study

2027



OISESA

Office of Independent
Schools Evaluations
Southern Africa

Table of Contents

1.	Introduction	3
2.	The Value of Quality Assurance	3
3.	The Quality Assurance Process	4
4.	Terms & Conditions	5
5.	Setting Up the Quality Assurance Team	6
6.	Online Training	6
7.	Beginning the Self-Study	7
8.	The Surveys	8
9.	Collecting Evidence	9
10.	Rating Strengths and Identifying Challenges	10
11.	The School Visit	10
12.	The Self-Study Report	11
13.	Conclusion	11
Appendices		
A	Examples of Types of Evidence	12
B	Guidelines for Online Training	19
C	OISESA Notification Letter to Chair of the Board	20
D	Example of Letter to Parents re Surveys	22
E	Checklist for Onsite Visit Timetable	23
F	Protocols for Focus Groups	24
G	Example of Lesson Observation Form	26
H	Survey Information Form	28
I	Sample of a Section of the Self-Study Report	48

Copyright Note

These Standards & Indicators are the copyright of ISASA and OISESA (established 2022). All rights are reserved. Any redistribution or reproduction of part or all the contents in any form is prohibited.

Schools may print and download resources from the website for their own non-commercial use only.

Individuals may not distribute or commercially exploit the content, nor transmit or store it in any other website or other form of electronic retrieval system.

1. Introduction

The Office of Independent Schools Evaluations, Southern Africa (OISESA) began operating in May 2022 to re-establish the process of quality assurance in ISASA schools. ISASA's vision, '*Boldly leading the independent schooling sector in its pursuit to provide quality education,*' holds its member schools to high standards and requires them to undertake a whole school self-study every six years. As the ISASA-appointed, independent quality assurance body, OISESA strives to establish positive partnerships with independent schools across Southern Africa, using a set of globally aligned [Standards & Indicators](#) to facilitate institutional reflection for continuous improvement.

OISESA has conducted over 600 school visits to date. Ongoing revisions of the programme continue, with input from stakeholder schools and mentors.

2. The Value of Quality Assurance

OISESA believes all schools can improve through ongoing reflection and strengthening of their educational programmes. The quality assurance process promotes strategic thinking and adaptability, which are essential in a changing educational landscape.

Effective change comes from within. The self-study process encourages schools to evaluate their mission, values, and practices using *The Standards & Indicators*, fostering critical reflection to recognise strengths and identify areas for growth.

Participation demonstrates a school's commitment to professional accountability and enhances its credibility with stakeholders. Mentors support the process by verifying findings and providing broad recommendations for improvement.

3. The Quality Assurance Process

These are the steps in the six-year quality assurance cycle:

- ISASA notifies member schools at least six months ahead, via email, that a quality assurance visit will take place the following year.
- Schools complete a reply slip to confirm their participation.
- OISESA communicates the exact dates of the visit to the school and shares a link to the OISESA [website](#) where the necessary resources are available, including the *Standards & Indicators*, *Guidelines for Schools*, and the template for the *Self-Study Report*.
- The school confirms these dates with OISESA. **NOTE: These dates are unfortunately not negotiable.**
- The school shares the OISESA notification letter ([Appendix C](#)) with the chair of the board. A pdf copy is available to download [here](#).
- The mentors are introduced, and they set up an initial online meeting with the head to clarify the process, at least three months before the onsite visit.

- The head, together with the senior leadership team, appoints their quality assurance team and the team leader, and they begin the self-study.
- The mentor collaborates with the team leader to arrange online training for the team, at least two months ahead of the school visit.
- The school completes the OISESA surveys. This process is described in detail under Section 8 of this document. The surveys should be completed at least six to eight weeks before the visit; however, some schools prefer to do these much earlier on in the process. The full set of survey questions can be found [at this link](#).
- The school submits their draft self-study report to the mentor at least a week prior to the school visit, together with a link to a digital portfolio of evidence.
- The school prepares and shares the timetable for the mentor visit at least a week prior to the school visit.
- The mentor completes the onsite school visit over three days. If the school is very small, it is possible that two days may suffice. This would be discussed with the mentor.
- The school submits their final self-study report to the mentor two weeks after the onsite visit.
- The mentor may edit the self-study report and return it to the school for verification.
- The mentor completes and shares the mentor's report with the school.
- The mentor submits both reports to OISESA.
- A Quality Assurance Certificate is sent to the school by OISESA. In addition, schools may add the OISESA logo to their website / letterheads.
- This process may take up to four months to complete, from the time of submission of the school's final self-study report. Schools may begin implementing recommendations in the interim but may not publish the reports until they have the final certificate from OISESA.
- OISESA sends the final reports to ISASA.
- Schools complete a feedback survey for OISESA.
- After three years, schools submit a three-year interim report to OISESA.

4. Terms & Conditions

4.1 Notification & Deferment

- It is a condition of membership for ISASA schools to undertake the self-study evaluation every six years. ISASA notifies schools of an upcoming visit in the following year, and commissions OISESA to undertake a quality assurance evaluation with each school.
- Where a new head has been appointed, a deferment of six months may be requested. New member schools may also request a deferment. Schools need to communicate directly with Mr Wayne Stuurman at ISASA to request a deferment.

4.2 Number of Reports & Mentors

- The number of reports is dependent upon the phases registered with ISASA for each school. For example, if the school has an ECD, a primary school and a high school registration, three different reports would be submitted. See more detailed notes under point 12.

- Similarly, the allocation of mentors aligns with the number of phases – OISESA sends one mentor for each phase registered with ISASA. For the above example, three mentors would undertake the joint visit, one for each phase.

4.3 Confidentiality & Ethics

- During the online training, mentors will discuss the need for confidentiality with the quality assurance team. Confidential information is any information, relating or belonging to the school which is not known to the public and could reasonably be regarded as confidential, and includes information for example about employees, customers, finances, research, and survey data. Discussions in focus groups, interviews and meetings are also to be treated as confidential.
- As this is a self-study process, mentors do not need access to personal data or sensitive information in the shared digital evidence folders. Should the school wish to share any sensitive information, it is recommended that this be done in hard copy format, during the onsite school visit, and is retained by the school.
- Mentors undertake always to act in the best interests of the schools they work with and take reasonable steps to ensure that the school's confidential information is not disclosed or distributed. They agree to certain confidentiality provisions as part of their contract with OISESA. Once the process is completed and the final reports have been sent to ISASA, the mentors delete the school's information.

4.4 Cost

- There is no additional charge for the online training day or the onsite quality assurance visit, as this is incorporated into the schools' annual ISASA membership fee over a six-year cycle.
- In addition, OISESA covers any travel and accommodation costs incurred by mentors. However, should a school cancel or change the dates of the onsite visit for any reason, they will be responsible for any additional charges impacting travel and accommodation.

4.5 Ongoing Support

- ISASA contracts OISESA to complete each quality assurance visit, for a finite period. For this reason, mentors are unable to provide ongoing support to schools.
- Should a school need further assistance with implementing some of the recommendations, they are encouraged to reach out to the relevant Regional Director or to the ISASA offices. Contact details are available on the [ISASA website](#).

5. Setting Up the Quality Assurance Team (QAT)

- The process of the self-study should be inclusive and collaborative, using as wide a range of staff members as is feasible. The head, together with the senior leadership team, appoints the members of the quality assurance team.
- The head plays a key role and is included in all aspects of the process – as much as time will allow.

- The head elects a team leader, ideally a senior staff member, who is an effective leader and can get things done. The team leader ensures the smooth running of the process, arranges focus groups, and coordinates the evidence collected by the team members for the self-study report. The team leader collaborates closely with the mentor and is the primary point of contact between the school and OISESA.
- The head and the quality assurance team allocate areas of responsibility for each of the standards. This will vary depending on the school's capacity, and may for example involve the whole staff, or only the senior leadership team, or a mix of HODs, grade heads and classroom teachers.
- The person taking responsibility for a particular standard does need to have some knowledge of that standard, so they can discuss their findings with the mentor during the onsite visit.
- OISESA encourages the school to use this exercise as a rich professional learning opportunity for as many staff as possible.
- The head elects a report writer who will write and refine the final self-study report, using the template provided by OISESA. This is preferable to the head writing the report. The head signs off the final self-study report before sending it to OISESA.

6. Online Training¹

- Mentors reach out to heads to set up a date for the online training at least three months prior to the school visit and obtain details of the team leader who will be the primary contact.
- The mentors run the online training.
- The training establishes contact with the quality assurance team and outlines the self-study process.
- The session takes around two to three hours, depending on the school's requirements. The school may elect to split this into two separate sessions, in discussion with the mentor.
- It is helpful for the quality assurance team to have read and understood the guideline documents thoroughly, as this reduces the amount of time needed. Please refer to [Appendix B: OISESA Guidelines for Online Training](#) before the session.
- Having printed copies of the **Standards & Indicators**, the **Guidelines for Schools**, and the self-study report template to refer to during the online session is also useful.
- A pdf of the PowerPoint will be shared once the online training is completed. The mentor will also make a recording of the meeting and share it with the school if requested.

7. Beginning the Self-Study

- The quality assurance team familiarise themselves with the **Standards & Indicators** and meet to discuss the school's alignment with each standard. They may suggest including other focus areas, depending on the mission and the needs of the school, the results from the surveys, as well as recommendations from previous quality assurance reports.

¹ In the 2024 and 2025 feedback reports, it was mentioned that some schools might prefer in-person training. Given that the schools each year are spread across Southern Africa, including neighbouring states, it is not feasible for OISESA to provide this.

- The **standards** focus on the important aspects of the overall concept, whilst the **indicators** are used to show that a standard has been met. Schools might choose to use different indicators where appropriate or decide that a particular indicator is not relevant. Any variation must be discussed with the mentor and mentioned in the list of evidence provided.
- The standards use general terms like ‘effectively’ and ‘appropriate.’ These terms are applied within the context of the school’s mission and values, as what applies in one school may not mean the same in another context.
- The school may decide to review their existing mission statement as needed.

8. The Surveys

Please note that these surveys are run by OISESA and facilitated by the school. The school may not run these surveys themselves and submit the results to OISESA as this compromises the integrity of the process.

8.1 Purpose & Structure of the Surveys

The purpose of the stakeholder surveys is to provide direction for the school’s self-study – highlighting strengths and identifying areas of vulnerability. Copies of the [survey questions](#) can be found on the website. An example of a notification letter to parents can be found in [Appendix D](#).

We currently offer the following surveys:

General Surveys

- Parent Opinion Survey
- Staff Opinion Survey
- Admin Staff Opinion Survey
- Student Opinion Survey (from Grade 4 upwards)
- Board Opinion Survey

Boarding School Surveys

These surveys are administered in addition to the general surveys, but they only apply to stakeholders involved in boarding.

- Boarding School Parent Opinion Survey
- Boarding School Staff Opinion Survey
- Boarding School Student Opinion Survey

The full set of surveys is also available in Afrikaans. Translations of the parent survey questions are available in isiZulu, isiXhosa, and Sesotho. Any changes to questions in different languages need to be provided by the school.

There are currently no surveys for service and ground staff. The mentor may request to run a focus group discussion with service staff during the onsite visit.

The parent survey makes provision for parents who have more than one child in a particular phase. Parents with students in more than one phase will be required to complete more than one survey. Parents who are board members and complete that survey must also complete the parent survey.

8.2 Implementation

- The school completes the survey information form ([Appendix H](#)), indicating any changes needed to the surveys. These are sent to info@oisesa.org. **Note that OISESA only accommodates minor changes.**
- Complex schools complete one separate form for each section of the school. Clear information is needed as to how phases are divided, e.g., 000 – 0, Grade 1 – 4, College or Preparatory, and so on.
- There is only one board survey per school.
- OISESA sends the live survey links to the Team Leader who runs brief check and requests any further changes if necessary.
- The school sends the OISESA survey links to stakeholders at least six to eight weeks before the visit. Schools may choose to do the surveys much further in advance.
- Clear communication with stakeholders is needed regarding the surveys to ensure a high level of participation. We recommend sending out additional reminders as well during the process.
- The surveys are designed using Microsoft Forms and can easily be answered on either a laptop or a cell phone. The respondent does not need to be a Microsoft user to complete them.
- The staff survey should take around 15 minutes to complete, the admin staff survey 10 minutes, the parent survey 10 minutes, the board survey 10 minutes, and the student survey 5 minutes. The boarding surveys will each take around 5 minutes to complete.
- It is suggested that the surveys are run over a short, intense period (3 – 5 days). It may be useful to set aside slots for staff to complete their survey, e.g., in a staff meeting or during a break, and for students to use an IT lesson or form period to complete their surveys.
- The student survey can be used with students from Grade 4 upwards. Teachers may need to provide guidance for younger students.
- The school notifies OISESA at info@oisesa.org when they are ready to close the surveys. Schools may request a progress report to gauge the number of responses before closing.
- OISESA sends through the results to the head, both as a pie chart version, and an Excel document which allows greater flexibility in working with data.
- The results are shared with the mentors working with the school and are treated as confidential.

8.3 Results

- Individual schools will decide how best to use the data provided by the multiple-choice responses as well as by the comments, noting questions that elicit negative or strongly negative responses, as well as those that are positive or strongly positive.
- When interpreting and reporting on the results, it is important to include information about how many respondents completed each survey out of the total number for each group. The higher the percentage of responses, the more credible the findings, for example, 91 of 100 students completed the survey, and so on. A table is provided in the self-study report for this.

- In calculating the percentage response for parent surveys, this should be based on one survey per family. However, should both parents wish to participate, that is also acceptable.
- In analyzing the comments, schools would look for themes that may be useful to include in the self-study report or to address in focus groups or further surveys.

Note: Please do not share any comments which are of a personal nature.

9. Collecting Evidence

The quality assurance team begin to gather and review evidence to ascertain the school's alignment with each standard.

- Data collected will consist of both **quantitative** and **qualitative** data. Quantitative data include, for example, the analysis of numerical data like test scores, rating scales, checklists, and surveys. Qualitative data include, for example, observations, interviews, and surveys, and are often more narrative in format. Existing documents and records are also relevant, such as attendance records, minutes of meetings, lesson plans, policies, student portfolios, and so on. A list of examples of evidence is provided in [Appendix A](#).
- The quality assurance team is encouraged to use a variety of data collection techniques, to ensure that the evidence provided is authentic and reliable; however, it is not necessary to provide copious amounts of evidence for each standard.
- In addition, evidence collected via an alternative quality assurance process is acceptable, for example, a current NOSA or other Health & Safety Provider Certificate would suffice, or recent Umalusi accreditation documents, where appropriate.
- Schools are encouraged to provide as much of the evidence as possible in digital format at least one week before the onsite visit. There is not sufficient time for mentors to check all the evidence thoroughly during the visit itself. This will also allow the opportunity for informed questions during the visit.
- It is not necessary for schools to share personal or sensitive information with mentors. For example, a letter from the school's auditors confirming a recent audit would suffice, rather than providing access to financial statements, and so on.
- Mentors will not check every individual policy – a signed statement from the head confirming that the relevant policies are in place and up to date will suffice. However, they may request to see a particular policy if it is needed as part of the discussion for a particular standard.
- Evidence needs to show the effective implementation of the school's policies.

10. Rating Strengths & Identifying Challenges

- The quality assurance team meets to identify strengths and challenges and examine ways in which the school might strengthen and improve certain areas of vulnerability. The survey results are helpful here.
- Using the self-study report template, a summary of reflections for each standard should be compiled, together with an overall self-rating for that standard.

- Standards are rated using the following rating scale.

Rating	Description
5	Consistently exceeds expectations
4	Consistently meets expectations
3	Meets most expectations
2	Needs improvement
1	Not achieved yet
N/A	This rating would be discussed with the Mentor and with OISESA before the self-study process

Note: The use of half numbers is acceptable. These are written as 3,5.

11. The School Visit

- The mentor undertakes a three-day in-person visit to the school, on the dates stipulated by OISESA.
- The timetable for the onsite visit will be planned to include meetings with members of the team, interviews, class visits, focus groups, and so on. A checklist is provided in [Appendix E](#) to assist with drafting the onsite visit timetable.
- During the visit, the mentor will confirm the findings of the self-study report and surveys and verify the school's rating alignment with the **Standards & Indicators**.
- The mentor will visit a small selection of classes to better understand the school's educational programme. Brief verbal feedback may be given to the teacher immediately after the observed lesson; however, the focus is not on individual teachers' performance, rather on **Teaching & Learning** across the school.
- Schools are encouraged to undertake their own lesson observations before the visit, to ensure effective feedback in the report.
- Mentors use the **Lesson Observation Template** in [Appendix G](#) as a guide.
- Mentors will not assess the religious curriculum in faith-based schools. However, an understanding of its impact on the school's mission, ethos, culture, and climate, and so on, is helpful.
- Interviews, focus groups and meetings will also be held, in discussion with the quality assurance Team. Protocols for focus groups are provided in [Appendix F](#).

- The mentor writes a report affirming strengths and making recommendations for improvement once the self-study report is finalised, after the school visit.

12. The Self-Study Report

- ISASA requires a separate self-study report for each membership phase of the school. OISESA allocates a mentor to each membership phase. Stand-alone schools will only submit one report.
- Certain sections of the report may be repeated across phases, for example in matters of governance or admissions; however, schools need to ensure that each report respects the nuances of different perspectives in each phase.
- The self-study template provides clear guidelines regarding layout and format. In addition, an example of a section of a self-study report is included in [Appendix I](#).
- The document is submitted as a Word document to the mentor who may make recommendations and changes before the final version is completed.
- The school's final signed self-study report is submitted as a pdf, and no further changes will be made by OISESA.
- The report does not include actual evidence – this is presented in digital folders or in hard copy.

NOTE: Schools are encouraged to keep their reports concise, with a more strategic focus, rather than listing every detail. The report should ideally not exceed 35 pages, or in the case of a school with boarding facilities, 40 pages.

13. Conclusion

- Once the reports have been submitted to OISESA, and approved, a Quality Assurance Certificate will be emailed to the school within a period of four months.
 - Schools may also publish the OISESA logo on their website / letterheads, to signify the completion of the quality assurance process.
 - Schools are requested to share feedback with OISESA after the visit to help continue refining and developing the process to best suit the needs of schools in Southern Africa.
 - After a period of three years, schools submit a brief interim progress report to OISESA. A template and guidelines are provided for this [on the website](#). Schools will be notified by ISASA ahead of time.
-

Appendix A: Examples of Types of Evidence

The following suggestions are merely examples of the type of evidence schools might provide. This list is by no means complete, nor should schools be expected to provide examples of all these types of evidence.

For all standards, the following examples of evidence apply:

- Notes and numerical data from any recent evaluation processes undertaken by the school itself, including focus groups, surveys, and interviews
- OISESA survey results from the board, parents, students, staff, and admin staff.
- OISESA focus group findings.
- Examples of email communication with stakeholders.

NOTE: Where a policy is provided as evidence, there must also be reference to the ways in which the policy is implemented, and how the school ensures it is understood by staff, students, and parents.

1. Mission

Policies

- **Admissions Policy**
- Current mission statement (How often is the mission statement reviewed? Is it child friendly?)
- Statement of values / beliefs
- Schedule of fees
- Current Umalusi certificate (confirming legal compliance)
- EMIS Certificate
- Example of a parent contract, including provision for the non-payment of fees

2. Governance & Leadership

Policies

- **Policies relating to the procedure for the appointment of the head; financial management policies; debt control**
- **The Board Constitution**
- **The MOI**
- **Environmental Policy**

Useful Resources

- **ISASA Guidelines: *Building Positive Relationships between Management and Board Structures in Independent Schools***
- **ISASA Handbook: *A Guide to Effective School Governance***

- Relevant information about the board, including ways in which board members are elected / evidence of self-evaluation / tenure / training provided
- Minutes of recent meetings
- Communication from the board regarding their activities and decisions
- Annual reports
- Current strategic plan
- Risk management matrix
- Management letter from auditors confirming that the school has the controls and systems in place to manage its finances appropriately
- A copy of signed annual financial statements or declaration of a 'going concern' from auditors to confirm the school's financial sustainability
- A letter from the relevant insurance company regarding adequate insurance cover
- A statement from the head confirming that the necessary policies are in place and reviewed regularly, over a 3 – 5-year period
- Evidence of succession planning: the school is preparing for staff departures; the school provides leadership and development opportunities
- Evidence of implementation of environmental policy: curriculum documents; photographs of environmental projects; certificates from organisations like Green Flag, WESSA
- Initiatives for loadshedding and water supplies

3. Culture & Climate

Policies

- **Transformation & Diversity Policy**
- **Anti-Discrimination Policy**
- **Staff Recruitment & Selection Policy**
- **Employment Equity Policy**

Useful Resources

- **ISASA: A Guide to Effective School Transformation and Diversity Management**
 - **The ISASA Anti-Racism Statement**
 - **The ISASA Equality Policy Framework**
 - Documents relevant to the school's culture and climate, and support structures
 - Minutes from Employment Equity and Transformation & Diversity Committee meetings
 - Employment Equity Plan
 - Evidence of staff training on issues of diversity and inclusion
 - Evidence of effective reporting channels
 - Photo showing diverse reading materials in the library, catering for other languages
-

4. Communication

Policies

- **Communications Policy (including protocols for WhatsApp and other communication channels)**
 - Parent code of conduct / Parent contract
 - Newsletters
 - School magazine
 - Website information (including processes for updating website)
 - Examples of communication with parents, including notification of date and time of parent-teacher interviews; communication via homework diaries; Google classroom messages
 - Evidence of communication from the board
 - Evidence of communication between leadership and staff; between and within distinct phases of the school
 - Marketing communication and strategies
 - Staff meeting minutes
 - Assemblies
 - Calendars
 - Extramural timetables
 - Student reports
 - Examples of communication with former students
-

5. The Education Programme

5.1 The Curriculum

Policies

- **Policy for the Design and Implementation of Learning Programmes**
- **Subject Policies**
- **Assessment Policy (including examinations and moderation protocols; AI monitoring to ensure that it is not used in assessments that are supposed to be the students' own work)**
- **Language Policy (language of instruction, official languages, and exemptions)**
- A copy of the curriculum statement
- Evidence of the home language and additional languages offered
- Evidence of innovative initiatives, such as coding, robotics, and so on
- The timetable
- External exam and other benchmarking results
- Evidence of participation in external user groups / cluster groups / collaboration with other schools

- Effective integration of technology into the curriculum
- Evidence of IT training for staff
- Evidence of training for staff on the appropriate use of AI

5.2 Teaching & Learning

Policies

- **Policy for the Evaluation, Monitoring, and Reporting on the Quality of Teaching & Learning**
- **Learner Support Policy**
- Examples of student work: exercise books, tests, photographs, journals, portfolios, digital portfolios, recordings, and so on
- Class visits and observations
- Evidence of collaboration / co-operative group work / 21st century skills in teaching and learning
- Effective use of technology as a tool in the classroom
- Evidence of guidelines and training around the use and implementation of AI, both for teachers and for students
- Examples of assessment tools demonstrating student progress
- Evidence of extension and support, according to students' differing needs

5.3 The Co-Curricular Programme

Policies

- **School Excursion Policy (including Sporting Trips)**
- The co-curricular programme timetable
- Evidence from the school magazine, newsletter, website, showing activities
- Evidence of community service initiatives
- Spectators' Code of Conduct

6. Staffing

Policies

- **Staff Appraisal Policy**
- **Staff Development Policy / Plan**
- **Grievance Policy**
- **Policies addressing retrenchment, retirement, sexual harassment, disciplinary measures, misconduct, and remote work**
- **Policy for the management and mentorship of teacher Interns**
- **Policy for the management of visiting student teachers**
- Staff code of conduct / Staff handbook
- Employment contracts (in line with labour relations legislation)

- List of staff qualifications
 - A list of recent professional learning opportunities provided to staff
 - Process for onboarding and mentoring of new staff
 - Minutes of staff meetings
 - Job descriptions for staff
 - Evidence of an effective performance appraisal system
 - Evidence of a wellness programme / counselling availability / staff well-being activities
 - Evidence of support staff integration and support
-

7. Student Well-Being

Policies

- **Policies relating to behaviour management; discipline; substance abuse, appeals, and grievance procedures**
 - **Anti-Bullying Policy**
 - Student Code of Conduct / Student handbook
 - Documentation outlining learner support services / counselling and guidance services / other support structures in place
 - Evidence of counselling for further education opportunities / subject choices
 - Photo of letterbox, or App, where students can request support
-

8. Safeguarding

Policies

- **Safeguarding Policy**
- **School Excursion Policy**
- **Social Media Policy**
- **IT Responsible Usage Policy / Digital Citizenship**
- **Policy for Extra Lessons (venues, times, supervision)**

Useful Resources

- **The ISASA Child Protection Policy**
- A statement from the head confirming current employees' compliance with the legal provisions outlined in the **Standards & Indicators**
- List of relevant services, authorities, and organisations with contact details
- Evidence of staff training in all aspects of safeguarding
- SACE registrations, Police Clearance Certificates, Sexual Offenders' Register; Child Protection Register
- Duty rosters for supervision of students

- Evidence of teaching safeguarding in the curriculum regarding appropriate digital citizenship and social media
 - Reporting structures as outlined in the ISASA Child Protection Policy
-

9. Health & Safety

Policies

- **Health & Safety Policy**
 - **Critical Incident Policy / Register**
 - **School Excursion Policy (including transport, roadworthy inspections, check lists for buses, driver safety checks)**
 - **Lightning Policy**
- Health and safety officer role
 - Documents relating to Health & Safety, such as current inspection certificates from external audits (fire extinguishers, municipal health and safety certificates, safety audit)
 - Records of fire drills, evacuation procedures, and other safety protocols, including provision for lightning
 - Composition of health and safety committee and minutes of committee meetings
 - Crisis management plan
 - Management of security companies, cameras, alarms
 - Evidence of up-to-date contact information for students and parents
 - Provision for medical emergencies including first aid training for staff, provision of first aid kits
-

10. Facilities & Infrastructure

Policies

- **Data Management Policy (assessment records, records of students and former students, teachers' profiles, etc.)**
- **POPIA / PAIA Policies**

Useful Resources

- Templates and Guidelines for PAIA and POPIA compliance on the ISASA website
- Documented facilities plan
 - Maintenance procedures and plans
 - Cleaning registers
 - Playground audits (e.g., swimming pool access, storage of chemicals and cleaning sandpits, jungle gyms, provision of shade)
 - Photographs / evidence of provision for differently abled people
 - Information management system usage and restrictions regarding access
-

11. The Boarding Programme

Policies

- **Policies, handbooks and other material applicable to the boarding programme, as outlined in the *Standards & Indicators***
- Notes and numerical data from any recent evaluation processes undertaken by the boarding house itself, including focus groups, surveys, and interviews
- OISESA survey results from boarding school parents, students, and staff
- OISESA focus group findings

11.1 Culture & Climate

- Evidence of a culture of respect

11.2 Communication

- Boarding House Parent Committee
- Examples of appropriate communication with boarders' parents from the boarding staff
- Minutes of boarding house staff meetings
- Policies relating to replying to complaints; reporting structures; cell phones (including at night); electronic media
- House meetings; announcements in the dining hall, student leaders' coms
- Guidelines for communication with / from academic staff

11.3 Staffing

- List of qualifications of boarding house staff; appropriate experience and age
- Job descriptions for resident boarding house staff
- Appropriate training for stooges / interns if they reside in the boarding house
- Appropriate number of residential staff to ensure adequate supervision

11.4 Well-Being of Boarders

- Evidence of training of leaders and senior students regarding responsibilities, duty of care
- Provision of a buddy/mentor system for juniors
- Evidence of provision for the academic needs of boarders, including study times and other support
- Provision of health care facilities and administering of prescribed medicines for boarders
- Evidence of appropriate leisure time activities
- Evidence of provision for the observance of different religions

11.5 Safeguarding

- A statement from the head of the boarding house confirming that current boarding house staff (and all adults who reside with them), including kitchen staff and cleaners, have undergone rigorous reference, background, and police clearance / criminal record checks
- Evidence of boarding house staff training in all aspects of safeguarding
- Safety provision against bullying, initiation, abuse of power and privileges

- Disciplinary procedures and appropriate sanctions
- Provision for positive rites of passage and induction processes
- Duty rosters for supervision and tracking of boarders; signing out procedures
- Policies relating to POPIA and PAIA compliance and evidence of training for staff; searches; provision for the safe use of technology in the boarding house
- Reporting structures as outlined in the ISASA Child Protection Policy for students and parents to report concerns
- Provision for the safety and care of possessions

11.6 Health & Safety

- All Health & Safety procedures and policies apply
- A crisis management plan for the boarding house
- Evidence of provision for monitoring safety
- Evidence of up-to-date contact information for students and parents
- Provision for medical emergencies
- Provision for other emergencies, including fire drills

11.7 Facilities

- Documented facilities plan
- Maintenance procedures and plans
- Cleaning registers
- Design and layout of ablutions; privacy
- Kitchen facilities – appropriate storage, preparation, serving, washing up areas
- Records of students and former students
- Photographs / evidence of provision for differently abled people
- Information management system usage and restrictions to access

11.8 Catering

- Meal plans and menus
- Expertise sought in developing menus, e.g., dietician
- Evidence of provision for different dietary requirements
- Evidence of feedback channels / food committee regarding the provision of meals
- Supervision of meals – duty staff
- Provision of late / packed meals



OISESA Guidelines for Online Training

Connecting meaningfully with others in an online environment can be challenging. We ask that you give your full attention to the presenter/s and ensure that you follow these guidelines for online interactions.

- Use your full name as your Teams or Zoom display name for easy identification.
- Camera on; microphone off during the training session.
Camera off; microphone off during comfort breaks.
- Phone off or on silent. If you must take / make a call, step away from your computer into a different space.
- Please do not eat or engage in other distracting activities while in the meeting. Drinking a beverage is acceptable.
- If asked to give feedback, be brief and mindful of time so that others also get to share.
- Please respond when the presenter tries to communicate with you, either via the chat function or on video.
- Use the chat appropriately. If you would like to contact another participant directly, please use the private message function. rather than sending a message to everyone.
- If possible, ensure that each person uses their own device to attend the meeting. This reduces noise levels and makes it easier to respond to individual questions.
- However, if a school prefers to attend as one group, please check the following:
 - Check noise levels / acoustics in the room.
 - Keep background noise and sound echoes to a minimum.
 - Limit background movement.
 - Ensure that individual speakers can be identified and clearly heard by the presenter/s.

Appendix C²: OISESA Notification Letter to the Chair of the Board



For the Attention of the Board Chair

Greetings,

Re: OISESA Quality Assurance School Visit 2027

Ahead of our visit to your school, I am reaching out to provide an overview of what the OISESA quality assurance process involves and the benefits it brings to schools.

The Office of Independent Schools Evaluations, Southern Africa ([OISESA](#)) was established in 2022 to ensure that independent schools in Southern Africa maintain high standards of education and continuously strive to improve their educational programme as they navigate the changing landscape of education. All [ISASA](#) member schools are required to undertake the process once every six years. Schools are notified by ISASA at least six months in advance of the visit.

The process involves several key components:

- ***The Self-Study:*** Schools are encouraged to examine the relevance of their mission and values by using the [Standards & Indicators](#) to ask important educational questions and review their current practice. A template and guidelines are provided to assist the Quality Assurance Team [here](#). This self-evaluation encourages schools to affirm and celebrate their strengths while identifying areas of vulnerability.
- ***The Surveys:*** Stakeholder surveys are sent to all board members, staff, administrative staff, students, and parents at least six weeks ahead of the school visit. Additional surveys

² A pdf copy of this letter is available to download on the [OISESA website](#).

are provided for schools with boarding facilities. The data collected from these surveys is processed by OISESA and shared with the head, giving the school valuable feedback to incorporate into the self-study and improvement plan.

- **The Onsite Visit:** One or more of OISESA’s experienced [mentors](#) visit the school for a period of three days to observe the school's operations, to interact with the head, the board, staff, parents, and students, and to provide an external perspective on the school's performance and areas for improvement.
- **Feedback and Reporting:** After the visit, the school submits a final self-study report, and the mentor submits an independent report on their findings. This report includes commendations for areas of excellence and recommendations for areas that need improvement. Both reports are shared with ISASA once the process is complete.

The benefits of participating in the OISESA quality assurance process are numerous. It demonstrates the school's willingness to be held professionally accountable, enhancing its credibility with stakeholders and with the wider community. The self-study promotes strategic thinking and helps schools develop actionable plans for continuous improvement. In addition, it encourages collaboration and engagement among staff, students, and the broader school community, fostering a culture of learning and growth.

In conclusion, the OISESA quality assurance process is a valuable undertaking that brings significant long-term strategic benefits to schools.

Kind regards



Margot Long
Executive Director OISESA

 margot@oisesa.org

Appendix D: Example of a Letter to Parents

Dear Parents

OISESA Quality Assurance Process

Our school has been selected by ISASA for a quality assurance evaluation during [date] this year. The evaluation will be conducted by the Office of Independent Schools Evaluations, Southern Africa ([OISESA](#)), an independent organization which specialises in evaluating ISASA member schools.

The evaluation process is guided by a set of globally aligned **Standards & Indicators**, covering the school's mission, governance & leadership, sustainability, culture & climate, communication, the education programme, staffing, student wellbeing, safeguarding, health & safety, facilities & infrastructure, [and the boarding programme].

We are in the process of compiling a self-study report ahead of the onsite school visit, examining each of these areas to celebrate what we do well, and to identify areas for improvement. Part of the data collection process involves the administration of stakeholder surveys for parents, staff, students, and the board. Links to the surveys will be shared [via WhatsApp / email] [on ...] and can easily be completed on cell phones or on laptops. No log-in is required, to ensure that your responses are completely confidential. The surveys will be closed on [date].

We really appreciate your taking the time to complete the parent survey – your feedback will help us refine our focus on areas that need attention and ensure we continue improving our practice.

If you have any questions or concerns regarding the OISESA quality assurance visit or the parent survey, please do not hesitate to contact our school office [provide details].

Kind regards

Joanne Bloggs

Executive Head

Appendix E: Checklist for the Onsite Visit

The following points may be useful when drawing up the school visit timetable.

- The mentor needs to meet with the person/people responsible for each standard to go through evidence and discuss the report. Each meeting should be about 45 – 60 mins long. For the long standards – for example, Standard 4 (The Education Programme) and Standard 2 (Governance & Leadership) - an hour each may be necessary.
- It is important for the mentor to meet with the head and/or the senior leadership team / quality assurance team early on the first day of the visit.
- There should be four to five one-hour focus group meetings (teaching staff, service staff, students, parents, boarders). The mentor will create the questions in consultation with the team leader at least a day or two in advance.
- The mentor needs to observe about four lessons during the visit, preferably across a range of grades and subjects.
- A meeting is needed with the board chair or a member of the board. This can be held online, if necessary, but face-to-face is preferable.
- A meeting is needed with the bursar / financial manager to discuss sustainability and financial processes.
- A meeting is needed towards the end of the last day with the team leader and/or the entire quality assurance team to discuss the way forward.
- Please ensure at least one or two short breaks (15 – 20 mins) each day to allow the mentor time to catch their breath and reflect.

Optional

- A tour of the school, with one or two of senior pupils, if possible.
 - An introduction to the staff soon after arrival.
 - Access to any activities that would give an insight into the ethos of the school, e.g. assemblies, religious services, cultural or sporting events.
 - Some of the tea or lunch breaks should be spent in the staff room to meet and socialise with the staff.
 - If a small room is available for the mentor's use during the visit, this would be appreciated. It makes it easier to hold confidential meetings.
-

Appendix F: Protocol for Focus Groups

1. Purpose, Scope & Size

- The purpose of a focus group is to explore different perspectives and opinions to obtain qualitative information about a topic. The survey results and the self-study report will help schools determine their areas of focus. Schools may choose to run some focus groups ahead of the school visit to refine their findings. Accurate minutes of these meetings must be kept.
- In consultation with the mentor, the school sets up around 4 – 5 focus groups and chooses the participants. It is important for the sample to be as representative as possible, to ensure authenticity and to prevent bias.
- If possible, participants should not hold more than one role in the school. e.g., a board member and a parent, or a staff member and a parent, and so on.
- It is also important that participants can speak freely in focus groups. Thus, careful consideration should be given when including leadership in the group, both for staff, student, and parent groups.
- Schools should provide a list of names of the participants, and an explanation of their roles in the school.
- The suggested size of a focus group is between 8 – 12 people.
- The average time for a focus group is usually 1 hour.
- The relevant information that is gathered in the focus group will be used in the school's self-study report where relevant. Any solutions suggested during the meeting will be reviewed by management and may or may not form part of the school's development plan in the future.

2. Planning & Recording

- The mentor confirms the time and venue for the focus group with the QAT leader.
- The questions will be drawn up in advance by the mentor in consultation with the QAT leader.
- The school may choose to run a virtual focus group, e.g., with parents. The links for this should be shared well in advance, together with several reminders, to secure good attendance.
- Should the mentor request it, a neutral staff member may be asked to assist with taking minutes of the meeting. Consent must be obtained from participants for any recording.


3. Setting the Ground Rules

The following ground rules will be explained by the mentor to all participants at the start of the focus group meeting. These rules are in place to provide a safe structure and to establish a feeling of trust in the process.

- A time limit will be set, and the group needs to adhere to that limit.
- All participants are asked to turn off their cell phones, or to put them on silent, for the duration of the meeting.
- Matters discussed during the meeting must be treated as completely confidential. No one may repeat any opinions or issues raised in the meeting. The discussion forum must provide a safe space for participants to share their opinions.

- The meeting must be minuted, with the participants' permission, so that the school can refer to anything said if they require greater detail. No other recordings of the meeting may be made.
 - Everyone is encouraged to participate actively, to take turns speaking, to avoid private side conversations, and to treat everyone's contribution with respect. Please encourage the sharing of opinions, even if they differ from that of others – it is important to gather all points of view.
 - Since the purpose of the meeting is to gather general information about a key focus area, participants are asked not to mention any individuals by name. Personal attacks on individuals undermine the integrity of the process. Any personal attacks will be stopped, and the conversation will be redirected.
-


Appendix G³: Example of a Lesson Observation Form

 <div style="display: inline-block; vertical-align: middle; margin-left: 10px;"> <h1 style="margin: 0;">OISESA</h1> <p style="margin: 0;">Office of Independent Schools Evaluations Southern Africa</p> </div>	
Lesson Observation Form	
School	Date
Teacher	Grade
Subject	No. of Students
Topic:	
Planning & Context	
The lesson aligns with curriculum planning.	
The lesson is age-appropriate and carefully planned.	
Clear learning goals are communicated at the outset.	

³ A copy of this form can be downloaded from the [OISESA website](#).

Students are actively engaged and encouraged to participate.	
Students are encouraged to work collaboratively.	
A culture of respect is evident in classroom interactions.	
The use of technology enhances learning in the classroom.	
Feedback & Assessment	
Meaningful feedback is provided to students to strengthen learning outcomes.	
There is evidence of differentiation to meet varied learning needs.	
A variety of assessment strategies are used where appropriate.	
Students' workbooks show evidence of accurate marking and positive feedback.	

Appendix H⁴: Survey Information Form

 OISESA Office of Independent Schools Evaluations Southern Africa	
Survey Information Form	
<p>Please complete one form for each phase of the school, e.g., the high school, the preparatory school and the pre-school.</p> <p>Note: There is a separate set of surveys for boarding school students, staff, and parents.</p>	
Full Name of the School¹ e.g., Blue Hills Preparatory School	
Grades to be included in this set of surveys e.g., Grades 8 – 12	
Parent Opinion Survey (Please include the whole question and number for changes.)	
Changes to questions	
Questions to be omitted / Additional questions	
Staff Opinion Survey (Please include the whole question and number for changes.)	
Changes to questions	
Questions to be omitted / Additional questions	
Admin Staff Opinion Survey (Please include the whole question and number for changes.)	
Changes to questions	
Questions to be omitted / Additional questions	

¹ This is the full name that will appear on the Quality Assurance Certificate.

⁴ A Word version of this form can be downloaded from the [OISESA website](http://oisesa.org). Once completed, please email it to info@oisesa.org. Please complete one form for each phase of the school.

Student Opinion Survey (Grade 4 upwards) (Please include the whole question and number for changes.)	
Changes to questions	
Questions to be omitted / Additional questions	
Board Opinion Survey (only one per whole school) (Please include the whole question and number for changes.)	
Changes to questions	
Questions to be omitted / Additional questions	
For Schools with Boarding Facilities (Delete this section if your school does not offer boarding.)	
Student Opinion Survey (Boarders only) (Please include the whole question and number for changes.)	
Changes to questions	
Questions to be omitted / Additional questions	
Parent Opinion Survey (Parents of boarders only) (Please include the whole question and number for changes.)	
Changes to questions	
Questions to be omitted / Additional questions	
Staff Opinion Survey (Staff who work in boarding only) (Please include the whole question and number for changes.)	
Changes to questions	
Questions to be omitted / Additional questions	

Signed Date

Appendix I: Sample of Self-Study Report

This is purely an example of the type of information included in the self-study. Schools are encouraged to present their findings in ways that apply appropriately to their own environment.

School's Self-Study Rating 3	Final Rating 3,5
<p>Evidence</p> <ul style="list-style-type: none"> • <i>Policies and Documents</i> <ul style="list-style-type: none"> ○ Anti-Discrimination Policy ○ Hair Policy ○ Minutes from the school's Transformation and Diversity Committee meetings ○ Curriculum statement incorporating examples of change • <i>Communication with the Community</i> <ul style="list-style-type: none"> ○ A recent newsletter article addressing the importance of diversity and inclusion (date) ○ Invitation to a Parent Conversations Evening (date) • <i>Professional Learning Programmes</i> <ul style="list-style-type: none"> ○ Evidence of senior staff attending a recent talk and sharing their learning with colleagues in a staff meeting, discussing transgender issues ○ Evidence of an external speaker workshop entitled 'Decolonising the Curriculum' • <i>Meetings and Focus Groups</i> <ul style="list-style-type: none"> ○ Minutes of a pre-visit focus group held with students to discuss the current school climate and culture (dates) ○ Minutes of a pre-visit focus group held with parents to discuss the current school climate and culture (dates) 	
<p>Summary of findings</p> <p>Bluehills College decided to focus particularly on this standard, as it is one that has not been evaluated before, and survey results from parents and from students indicated a need for further research into this standard. The school dealt with a challenging racial incident two years ago, and the senior leadership team have worked hard to establish effective structures to address issues before they arise.</p> <p>The Transformation and Diversity Committee refined the school's Anti-Discrimination Policy to incorporate elements of the Anti-Racism Statement, and the Equity Policy shared by ISASA. Evidence of the steps involved are outlined in the minutes. Changes have also been made to the school's Hair Policy to recognise cultural differences.</p>	

A new Head of Transformation and Development has been appointed, and they have established the Transformation & Diversity Committee with representatives from all stakeholder groups. The school's staff demographics are not where they should be, and this remains a key focus of the school's strategic planning.

The staff professional learning programme has included several workshops dealing with racism, transgender issues, and the importance of decolonising the academic curriculum. Examples of resulting curriculum change include choice of literature setworks, and appropriate topics chosen in the History syllabus. These workshops have proved beneficial, raising awareness of the need for inclusivity.

The student focus group raised the issue of more inclusive chapel services and the need for a more effective reporting structure to address any incidents of discrimination. The main findings of the parent focus group concentrated on the new hair policy which they feel still needs revising, and on the food served at school functions which appears not to cater for diverse cultural needs.

It is important to note that there was also a good deal of positive feedback in both focus groups about the changes the school has made over the past two years.

Commendations

- The school's policies are up to date and take cognisance of recent recommendations from ISASA.
- The appointment of a head of transformation and diversity has enabled a deep focus in this area.
- The staff professional learning programme is unique and has been effective in encouraging discussions about race and gender equality.
- Changes to the curriculum have been effective in attempting to decolonise some of the content taught in classrooms, whilst still retaining a global perspective.
- Communication with the community around matters relating to ***Culture & Climate*** is particularly good.
- Parent conversations evenings have proved worthwhile in opening discussions about race and addressing concerns in a safe and collaborative environment.

Recommendations

- The school needs to continue recruiting diverse staff in new positions, particularly at the decision-making level.
- Reporting structures for students need revising.
- Consider incorporating different languages and cultures in chapel services.
- Whilst it has been revised recently, the Hair Policy needs further discussion, including parents.
- Consultation with stakeholders is needed to ensure food served at functions meets diverse cultural needs.

Contact details for OISESA

Email: info@oisesa.org

Phone: 010 1572317