

“ **Start** the school that you’ve **dreamed of** ”





THE TRUSTED AUTHORITY FOR SCHOOL FORMATION

OVERVIEW OF OUR RANGE OF SERVICES, FEES, TASKS, AND TIMELINES TO ASSIST WITH THE FORMATION OF YOUR SCHOOL

My firm would be very interested in helping you to start and operate your own *School*. I’m emailing this PDF document to provide a general overview of the range of services, fees, and tasks needed in the process of starting your school. I felt that at this stage, a

general overview of my key services would be helpful in future discussions. Upon request, I can develop a more detailed proposal. Basically, our school formation services can be divided into six categories (any of which can be tailored to your needs:

SERVICES	TIMELINES	RANGE OF FEES (USD)
 1. Comprehensive Overview Session & Summary Report: Full-day meeting with client to determine scope of project, feasibility/costs, and critical steps to move forward (**NOTE: This fee can be credited to the service #4***).	1-2 days	TBD
<ul style="list-style-type: none"> ▶▶ Familiarization with your plans and current status; ▶▶ Exploration of your vision, mission, values, and philosophy for your School and critical components needed for success, including: <ul style="list-style-type: none"> ○ Vision, Mission, Educational philosophy, and Core values; ○ Educational Model; ○ Potential combinations for programs for each formation stage(s); ○ Linkage to Department of Education and Accreditation; ○ Management Team, organizational chart, personnel needs, and job profiles; ○ Understanding of policies and/or constitution of School; ▶▶ Determine timelines and services for each Stage of School Formation; ▶▶ Discuss Costs for Start-Up and Initial Operations Budget; ▶▶ Review Governance Model, Corporate Structure, mandates, licensing, and/or certification; ▶▶ Discuss Public Relations, Marketing, and Admissions Plan; ▶▶ Discuss Project Management Planning Schedule -- Identify timelines and priorities of School formation and operation; ▶▶ Review Potential Facility and/or Location Needs of the School; ▶▶ Determine the Scope of Engagement; ▶▶ Review client’s ‘readiness’ to move forward; ▶▶ Identify issues-strategies to ensure successful startup and operation; ▶▶ Summary Report, Recommendations, Action Plans, and Cost Profile will follow the meeting that will provide a concise ‘blueprint.’ 	1-2 days	TBD
 2. Formal Feasibility Study: Evaluate demand for proposed school and determine detailed costs and action plan.	8-16 weeks	TBD
<p>The Feasibility Study will be developed in 4 stages:</p> <ol style="list-style-type: none"> 1. Vision Session: Develop a draft vision, mission, values, and/or educational philosophy for the proposed school with the client. <ul style="list-style-type: none"> ▶▶ Determine the proposed need and demand for the school; ▶▶ Refine the <i>Feasibility Survey Tool</i> begin an initial assessment of the community, school location-development-competition, and who should attend the focus group meetings; 2. Community-Related Data Study: <ul style="list-style-type: none"> ▶▶ In-depth Community Demographics Analysis; 	8-16 weeks	TBD

- ▶▶ Other schools within market;
- 3. Market Research:
 - ▶▶ General public acceptance to private schools;
 - ▶▶ Market analysis of similar schools in;
 - ▶▶ Assessment of community support for new school;
 - ▶▶ Segment Analysis: Projected Enrollment;
 - ▶▶ What the community is looking for in an Educational Program;
 - ▶▶ Analyze Facility needs/expectations;
 - ▶▶ Review Grade Structure and Staffing;
 - ▶▶ Assess Community/Site/Competition;
 - ▶▶ Assess reaction to Tuition vs. Financial Aid;
- 4. Development of Summary Report:
 - ▶▶ Educational Program, class size, extra-curricular programs;
 - ▶▶ Stages of Formation;
 - ▶▶ School Organizational Structure;
 - ▶▶ Leadership/Governance Model;
 - ▶▶ Teaching and Non-Teaching Staff needed for each level, salary;
 - ▶▶ Facility and land needs;
 - ▶▶ Level of Market Demand/Support for School;
 - ▶▶ Financial Projections;
 - ▶▶ Project Schedule;



3. Inclusive Business Plan: Develop a detailed Business Plan for your new School for Start-Up and Operations.

- ▶▶ Develop an overview of the Purpose and Direction of the proposed school with the client.
- ▶▶ Determine the proposed demand for the school;
- ▶▶ Market analysis of similar schools in;
- ▶▶ Analyze Facility needs/expectations;
- ▶▶ Review Grade Structure and Staffing;
- ▶▶ Assess Community/Site/Competition;
- ▶▶ Assess Tuition Range;
- ▶▶ Educational Program, class size, extra-curricular programs;
- ▶▶ Determine Stages of Formation;
- ▶▶ School Organizational Structure;
- ▶▶ Leadership/Governance Model;
- ▶▶ Teaching and Non-Teaching Staff needed for each level, salary;
- ▶▶ Level of Market Demand/Support for School;
- ▶▶ Develop detailed Financial Projections for Start-Up and Operations:
 - ▶▶ Market Analysis;
 - ▶▶ SWOT's;
 - ▶▶ Competitive Edge;
 - ▶▶ Marketing Strategy;
 - ▶▶ Management Summary;
 - ▶▶ Financial Plan;
 - ▶▶ Breakeven Analysis;
 - ▶▶ Projected P & L, Balance Sheet, and Cash Flow;
 - ▶▶ Business Ratios.

4-8 weeks

TBD



4. 'Turn-Key' School Formation Services: Complete oversight for all the elements needed to start a School.

- ▶▶ Conceptual Development of the School's Niche
- ▶▶ Establish School 501 (C) 3, Regulatory Standards, Licensing, and/or Charter;
- ▶▶ Build Credibility in Community;
- ▶▶ Establish Board and Train Governance and Leadership;
- ▶▶ Develop Long Range and Strategic Planning;
- ▶▶ Develop Facility Plans, Space Needs, Re-Location, and Design;
- ▶▶ Design Curriculum and related Educational Programming;
- ▶▶ Human Resources; Identify Personnel Needs, Executive Search, Staff Recruiting, Job Descriptions, and Contracts;
- ▶▶ Ongoing Evaluation and Support for the CEO;
- ▶▶ Establish Faculty Appraisal System and Professional Development;
- ▶▶ Determine Combinations for Starting Grades and Phase-In Stages;
- ▶▶ Establish Fund Raising and Development Plans;
- ▶▶ Create Strategic Financial Plan for Startup and Operational Stage;
- ▶▶ Develop Marketing Plan to drive Enrollment, Communication and Public Relations, Competitive Positioning, and Admissions Process;
- ▶▶ Devise School Schedule and Timetable;
- ▶▶ Establish Student Management System, Record Storage, Accounting, and Reporting Systems;
- ▶▶ Source and Supervise Procurement for Equipment and Resources;
- ▶▶ Prepare Policy Manuals for Staff, Students, and Parents.

 6-18
 months

TBD



5. Ongoing Retainer: Assist in operation and management of school once operating.

- ▶▶ Related services are negotiable based on the needs of the project, location, and timelines.

TBD

TBD



6. Ongoing Management and Operations Services: Assist in operation and management of school once operating.

- ▶▶ Assist with preparation for Accreditation;
- ▶▶ Consult with Board Chair to build effective framework for Board leadership, procedures, and organization building;
- ▶▶ Support development of Annual strategic goals and evaluation/assessment;
- ▶▶ Support development of Annual Administrative goals;
- ▶▶ Assist with development of the structure for staff development;
- ▶▶ Assist with development and/or co-coordinating annual marketing-communications and recruiting plans with the CEO;
- ▶▶ Assist with supporting the CEO with annual review and coaching;
- ▶▶ Assist with preparation of the annual operating budget;
- ▶▶ Develop accounting systems, financial reporting, and audits;
- ▶▶ Revise policy manuals.

 10-24
 months

Negotiable





Who We Are

Halladay Education Group is a dynamic and experienced consulting firm dedicated to providing you customized solutions to start your own for- or non-profit private K-12 school or college. With our collective experience of specialized professionals and supporting services, and our knowledge and wisdom in starting and leading prestigious schools, we can guide you through the enormous challenges you'll face. Why should you take on the uncharted pitfalls and stress that every group faces in starting a new school when you could utilize our services and focus on the big picture – making your dream a reality. As you can understand, the tasks required to start a school are extensive and specific to your unique education sector and can be costly if not implemented correctly. Our mission is to 'Help You Achieve Success.' We want to become your *trusted advisor*, as invested in your future as you are. Our services will assist your founding Board or Team with the critical elements needed to start and expand your new school. We can assist you from concept to completion, sharing our expertise with:

- ☑ Developing a compelling Vision;
- ☑ Creating a Strategic Plan, Mission, Values, Goals, and Operational Plan;
- ☑ Developing a Business Plan;
- ☑ Coordinating Legal Team with respect to Non-Profit Status, Licensing, Bylaws, Constitution, and/or Incorporation;

- ☑ Recruiting and Educating Board and Senior Administration on Exceptional Leadership, Governance, and Team-Building;
- ☑ Marketing Research to Ensure the Vision Meets Community Demand;
- ☑ Supporting Development of the Facility Design, Site Search, and Lease/Purchase;
- ☑ Personnel Needs, Executive Search, Recruiting, Job Descriptions, and Contracts;
- ☑ Ongoing Evaluation and Support for the Head of School and Board;
- ☑ Building the Education Program;
- ☑ Determining Combinations for Initial Programs and Phase-In Stages;
- ☑ Developing Marketing Plan for Enrollment, Public Relations, and Admissions Process;
- ☑ Supporting the Development of a Financial Plan for Formation and Operational Stages;
- ☑ Establishing Student Management, Record Storage, and Accounting Systems;
- ☑ Supporting the Procurement Process ;
- ☑ Preparing Policy Manuals for Staff, Students, and Parents;
- ☑ Establishing Timelines and Project Management System in Formation Stage.
- ☑ Preparing for national and international accreditations (IB, WASC, ON, BC, NAIS, CAIS, CASE, MSACS, NEASC, CIS).

Our Team

Doug Halladay – President: Doug has +25 years experience as a Senior Leader in new and established public and private schools, including schools that are: co-ed, all-girls, boarding, equestrian, international, ESL, the largest learning disability school in Western Canada, and founding Head. He has held positions as Superintendent, Head of School, Deputy Head, Senior School Director Senior, Senior Curriculum and Resources Coordinator for the British Columbia Ministry of Education, K-12 teacher, and project leader. He has accreditation experience with NAIS, CAIS, ISA, WASC, IBO, and BC. In addition, he has chaired numerous Accreditation and Professional Development Committees, as well as a background in Training in Clinical Supervision for new teachers. Doug's credentials include a B.A. from Simon Fraser University; a Teaching Certificate from University of BC, and a M.A. in Educational Administration from San Diego State University; along with a Fund Raising Certificate from the Institute of Charitable Giving. Doug has broad knowledge of K-12 educational trends with his experience as a Senior Coordinator with British Columbia's Ministry of Education where he developed an unprecedented 20% of BC's current curriculum and policies.



Bill Wan – Executive Associate: Bill is a Chartered Accountant by profession, who graduated from the University of



BC with a Bachelor of Commerce. Mr. Wan joined the public sector, specializing in commodity taxes for more than 10 years. In 1995, Mr. Wan assisted a group of parents in the formation of an independent school on the west side of Vancouver. Since then, he has developed a keen interest in school administration and has been actively involved in the formation and management of +8 independent schools in Canada and USA. Mr. Wan has donated his time and services to a number of professional and charitable associations, including the University of BC Alumni Association as a

Director of the Board. He formed and developed a consulting practice and investment portfolio with extensive interests in real estate development and education. In addition, Mr. Wan co-founded TEC, a dynamic, profitable company in the post-secondary education industry. TEC owns 3 accredited colleges in the healthcare (nursing), animation, film and recording industries with campuses in Vancouver, B.C., Kelowna, B.C., Fredericton, NB, and Halifax, NS.

Thaddeus Monckton – ESL and Language School Specialist: Thaddeus is the founder, CEO, and owner of Pan Pacific International English College (PPIEC) - Study Canada, located in Victoria, British Columbia. Thaddeus has



extensive experience with International Education in Canada, the United States, and overseas.

Thaddeus has been in the education field since 1981, both in the private and public sector as well as working for the Ministry of Education in BC as the Provincial Coordinator of International Education and Multiculturalism and Anti-Racism. PPIEC was established in 1997 and is a private Canadian owned college. PPIEC offers intensive adult ESL, summer youth ESL, High School Prep, the GAC University Foundation Certificate, TOEIC, Business English, and TESL Canada recognized Diploma

Program. PPIEC has home stay as well as our International Residence program. In addition, PPIEC has an office in Mexico City and offers TESL, as well as a summer French College in Quebec City for adults and youth.

Carole Al-Kahouaji – International Baccalaureate & International School Formation Specialist: Carol is an



effective project and program manager, director, and mentor, with extensive experience in starting and leading international schools. She was the founding Director of two K-12 International IB schools in Syria and a Head of an International school in the US. She is an experienced IB trainer, as well as working on authorizing accreditation teams.

Carl Savage – BC-Offshore School Program & International School Formation Specialist: Carl has 42 years



experience as a teacher and public - private school administrator. He has worked in Ireland, England, Canada, China, and Egypt. He was the key Administrator and BC-Agent for Dalian Maple Leaf International School in Dalian, China, and the International School of Cairo. He has a wealth of experience as a public BC-certified school Principal at the K-12 levels. He is experienced with starting BC-based international schools in China and the Middle East and accreditation requirements,

and recruiting teachers for offshore schools.

Clint Wilkins - US-Based Program, CAIS, & WASC School Formation Specialist: Clint was founding Head of



Sage Hill School, Orange County's (CA) first non-denominational independent high school, which today serves 450 diverse and motivated students. Clint worked closely with the board of trustees to raise \$30 million to fund the construction of a state-of-the-art campus and the school's first five-year operating budget. Clint's early career is highlighted by his service at Sidwell Friends School in Washington, DC, where he was the Principal of the Upper School for many years and Assistant

Head. In addition, he was a Principal of the Upper School at Friends School in Baltimore. Clint was also the CEO of Moorestown Friends School in New Jersey, as well as the CEO of the College Preparatory School in Oakland. He is experienced in starting and leading US-based schools and accreditation with WASC, NEASC, and CAIS, MSACS.

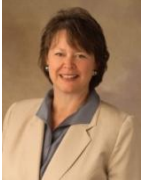
Jim Hopson – US-Based & Christian School Formation Specialist: Jim is the founding Head of Santa Ynez Christian School in California. It is a PreK-8 independent, co-ed, preparatory school of 175 students. Jim has +40 years of Christian Educational experience, with 34 years as a Principal of Junior and Middle Christian Schools, and Superintendent of three of the largest Grade K-12 Christian Schools on the US west coast. In addition, Jim has served on the Association of Christian School International Board, District Representative for ACSI and NGOS Board of Directors, and a Seminar Leader for ACSI conventions. He has a thorough understanding of all aspects of Christian Education from the Board level down. He has served on 5 accreditation teams for ACSI and a 4-year term on ACSI National Board.



Jerry Zank – US-Based School Formation Specialist: Jerry is the founding Head of Fisher Island Day School in Miami, Florida. Fisher Island is a PreK-5 Day School that serves a gated community on Fisher Island. Jerry has also been the Headmaster of a number of US-based independent college PreK-12 prep schools in Florida and Arizona with +125 staff and annual operating budget of +\$9 million. He is experienced with starting and leading US-based schools and accreditation with WASC, NEASC, and MSACS.



Becky Ward – Market Research Specialist: Rebecca is the President of Ward Research and has over 30 years of experience in market research, including research, sampling, and questionnaire design; field operations; data processing and analysis; and report preparation. In addition, she serves as moderator to focus groups and is recognized for her outstanding abilities in focus group facilitation. Rebecca has conducted multiple market studies for private school demand for almost 30 years in the U.S. and International marketplace.



Dr. Mark Hopkins, B.S., M.Ed., Ph.D. – US International University Development Specialist: Mark has 21 years experience as the President of a number of prestigious regional US-based University and Community Colleges in South Carolina, Illinois, and Iowa. Dr. Hopkins' has been the Executive Director of a US-based consulting firm supporting the development of Universities in the US and Internationally. Mark's areas expertise include: administration, admissions, and fund raising. His major experience has been in starting colleges to full operation. He has now completed 5, including several in India, Sri Lanka, and Korea.



Archie MacEachern, B.A., B.Ed., M.Ed., - Public School Governance & Strategic Planning Specialist: Archie has 37+ years experience in the public school system including positions as Principal, Supervisor of Curriculum, Director of Research and Planning, Director of Programs and Student Services, and Superintendent. He has been responsible for the day-to-day operation of a Canadian school system of 20,000 students and 2000 staff. He has led the planning and development of major projects including Strategic Plans, Board Policy-Oriented Governance, School Accreditation, International Student Programs, Facility review, education space planning for 10 new high tech schools including the first P3 (Private Public Partnership) school in Canada.



Mr. Royce Shook, B.A., M.A. - Curriculum Development & Educational Technology Specialist: Royce has +33 years experience as a teacher-leader in the public school system. He has been a Senior Curriculum and Resources Coordinator with the B.C. Ministry of Education, a K-12 teacher and project leader. Royce is currently the Area Chair and Senior Faculty for the College of Education, Curriculum, and Instruction program with the Vancouver Campus of the University of Phoenix. He has taught in the Masters of Education program, the MBA program and the undergraduate program at the Vancouver Campus. In addition, he has been a Department Head, a Career Facilitator, chaired numerous Staff Committees, Advisory committees and Professional Development Committees. He has also worked in the private sector, as a Director of Training, and has considerable experience helping small business owners set up



and market their businesses, having written 3 books on these topics. Royce understands and has considerable knowledge of K-12 educational trends, not only in educational technology but also in curriculum development, specifically in technology and vocational educational training (TVET).

Geoff Turner - Cert. Ed, B. Ed M.A. – Senior Associate – International School Development: Geoff has led schools in the UK and MENA and worked in public and private schools. His international work has taken him to China, USA, Russia, France and North Africa. He began working with school leaders in the UK and took his expertise to the Middle East where he worked with the largest provider of international education, leading 2 private GEMS schools. He has worked with UK, Indian, US, Canadian, and international schools on self-evaluation and improvement and senior leadership development, as well as assisting in the accreditation of Principals. He has supported school improvement and leadership development in Qatar, Jordan, Libya and UAE. As Principal of Wellington International School he led the development of a 'Wellington Brand' as a model for the setting up of premium international schools in the Gulf region.



Adele M Hodgson – Senior Associate – International School Formation Specialist: Adele's recent activities involve advising local government and economic development agencies on the establishment and effective management of schools, strategic planning, curriculum development and quality control, teacher recruitment and governance training. Adele has been involved in the establishment of 2 international schools in Europe – Dresden International School and Thuringia International School and is currently advising PHORMS AG on the establishment of a network of bi-lingual schools in Germany. One of her most recent projects is the development of the ECIS Diploma in Sustainable Governance which was launched in 2008. She has experience with the CIS/NEASC accreditation process, and the IB Programs, AP, and British "A" levels.



Chris Wright – Cert. Ed, B. Ed – Senior Associate – International School Development: Chris is an experienced educator who has worked in a range of schools with students from the ages of 3 –18. A school Principal for 16 years, he has led inner-city, multicultural and international schools with a very successful track record of school improvement and high academic achievement. In recent years Chris has held a senior position with two established, international education companies to oversee the development and the implementation of operational and instructional procedures and policies for their new start-up schools. With involvement in 22 new school projects Chris is able to provide the complete 'one-stop shop' approach to the set-up of a new school. This includes leading on the educational aspects of the school design and fit out, staff recruitment, induction and curriculum development. Having worked as a school inspector with the UK Government inspection agency OFSTED he is able to advise international schools wishing to offer a 'British Style' education based on the English National Curriculum.



Alfred Rodrigues (President of Rodrigues and Associates) – Tribal Specialist: Al is primarily a strategic planning consultant and has worked with various organizations throughout the Pacific Basin in identifying, developing and implementing long-term solutions to strategic issues. His clients include a range of businesses, non-profits and governments throughout the U.S. Mainland, Asia and the Pacific Basin. Specifically, he has worked with native and local indigenous groups including the Tulalip Tribes and Port Gamble S'klallam Tribe in Washington State; the Yapese, Chuckese, Pohnpeian, Kosraean and Palauan groups in Pacific Micronesia region; Chamorro's of Guam; native Hawaiian groups on the various islands of Hawaii; and various provincial tribes and communities throughout the Philippines. He has served as a consultant to the Tulalip Tribes of Washington since 1993. His work with them has steadily increased since then such that as of 2004, he spends approximately 6 months of the year living on the Reservation and serving as the primary consultant to the Tulalip Tribal Government. His work with them is aimed at improving the effectiveness and efficiency of a wide range of Tribal Government services.



Related School Formation Projects

Our Senior Associates have, as part of our collective experience, been involved in helping to *start, develop, and/or* lead a number of prestigious private K-12 schools and post secondary institutions. Listed below is a sample of our associate's school development projects.

INTERNATIONAL PROJECTS



Dalian Maple Leaf International High School – www.mapleleafschools.com

Students registered as BC students write Grade 10, 11, and 12 BC exams as resident students and graduate with same BC Ministry of Education transcripts and graduation diploma as resident BC students. English program taught by BC-certified teachers. Inspected annually and certified by BC Ministry of Education. Over 2,300 students are currently enrolled.

Jinshitan,
Dalian, China



British Columbia Canadian International School of Cairo – www.bccis.net

It offers a British Columbia program from PreK - Gr.12. All subjects are taught in English and all the academic staff must be BC College of Teachers certified. The school is certified by The BC Ministry of Education and is inspected annually.

Cairo, Egypt



International School Songdo – www.issongdo.com

ISS opens in 2011 and will be Korea's first international K-12 private school for Korean citizens and international students. Located in the new international free economic zone city of Songdo, Korea. The school is located on 24 acres in a new state-of-the-art 500,000 sq. ft facility and provides a co-ed- college preparatory IB program supporting 21st century learning.

Songdo, Korea



Dresden International School – www.dresden-is.de

DIS was founded 1996 and has grown steadily from 13 pupils to almost 500 from 44 nations. The school is a non-profit Grade PreK-12 co-ed international preparatory school, and a member of the European Council of International Schools and an International Baccalaureate World School.

Dresden,
Germany



Thuringia International School – www.this-weimar.de

THIS was founded in 2000 and is a PreK-12 co-ed international private school, offering a world-class learning experience to all children through an internationally recognized curriculum. It has grown to 265 students and is a member of ECIS, AGIS and IBO.

Weimar,
Germany



The Sheffield Private School – www.sheffieldprivateschool.com

Founded in 2004, providing high quality schooling for expatriate and local families who want a British style of education for their children. Following the National Curriculum for England it offers Nursery to Year 11 education, and will to expand each year to offer IGCSE and A level subjects.

Dubai, UAE



The Royal Dubai School – www.royaldubaischool.com

Opened in 2005, RDS offers a high quality education from Foundation Stage to Year 6. It is the only school in the area to offer the National Curriculum for England, taught by British trained teachers, and provides the best of British Education to the diverse international community in Dubai.

Dubai, UAE



Wellington International School – www.wellingtoninternationalschool.com

Opened 2005, WIS is a PreK-12 private school based in the Al Sufouh area of Dubai, offering the National Curriculum of England with plans to offer the International Baccalaureate Diploma Programme in Years 12 and 13 from September 2009 onwards.

Dubai, UAE



The World Academy – www.theworldacademy-kaec.com

TWA - King Abdullah Economic City is a premium Pre-K to Grade 8 international schools, providing a high quality education, and intends to offer a special curriculum based from the American and International Standards. The school features iconic architecture with inspirational spaces.

King Abdullah
Economic City,
KSA

US-BASED PROJECTS

Island Pacific Academy (IPA) – www.islandpacificacademy.com

IPA is a secular, co-educational, independent school offering programs from PreK-12. It is currently Grades PreK-8 with 1 grade added each year up to Grade 12. It is certified by NAIS, WASC, and Hawaii ISA certification.

Kapolei,
Hawaii, USA


Sage Hill School – www.SageHillSchool.org

SHS is a Grade 9-12, Co-ed college preparatory day school founded in 2000 on a 30-acre campus with academic buildings, library, gymnasium, football/soccer field, baseball field, outdoor basketball and sand volleyball court, and outdoor amphitheatre. It has an enrollment of 450 students. It is accredited by WASC, NAIS, CASE, and CAIS.

Newport,
California. USA


Santa Ynez Valley Christian Academy – www.syvca.com

Santa Ynez is a Grades K-8 Private Interdenominational, co-ed, religious, non-profit school of 152 students, and belongs to the ACSI.

Santa Ynez,
California, USA


Fisher Island Day School – www.fids.org

FIDS is a Grade Prek-5 Private co-ed, non-denominational, school prep school. Students are exposed to languages (Spanish and Mandarin Chinese) technology, strong academics, and inculcation of strong character.

Fisher Island,
Miami, Florida,
USA

CANADIAN-BASED PROJECTS

West Point Grey Academy (WPGA) – www.wpga.bc.ca

WPGA is an independent, PreK-12, school preparatory, co-educational school started by the consultants and a group of dedicated professionals in 1996, using an enriched BC curriculum. It is a BC-certified school and accredited by the ISA, CAIS.

Vancouver,
British
Columbia,
Canada


Aspengrove Academy – www.aspengroveschool.ca

Aspengrove School is a Prek-12 independent, non-denominational, co-educational, school preparatory school. It is a BC-certified school.

Nanaimo,
British
Columbia,
Canada


Stratford Hall – www.stratfordhall.ca

It is a K-12 International Baccalaureate independent co-ed school for K-12, authorized to teach the IB Primary Years and Diploma Programmes. It is a BC-certified school and accredited by CAIS.

Vancouver,
British
Columbia,
Canada


Southpointe Academy – www.southpointeacademy.ca

Southpointe is an independent, Prek-12, school preparatory, co-educational school of +450, using an enriched BC certified curriculum.

Delta, British
Columbia,
Canada


Lax Kw'alaams Academy

An independent K-12 First Nations Academy with a new, innovative and state-of-the-art technology program, offering a rich Tsimshian culture and music.

Lax Kw'alaams,
British
Columbia,
Canada

POST SECONDARY PROJECTS



American National College – www.anc.net

Sri Lanka

Offers Sri Lankan students affordable alternative to spending 4 or more years overseas pursuing higher education. Students obtain 1-2 years of credits toward Associates or Bachelor Degrees at ANC. All courses are 100% transferable to partner Universities in the USA, offering US School courses taught by US professors, US textbooks, and course outlines.



Pan Pacific International English College - www.victoriaesl.com

Victoria, British Columbia, Canada

PPIEC offers English as a Second Language, High School, School Preparatory programs, and teacher training institute (TESL).



Center for Arts and Technology (CATO) – www.digitalartschool.com

Campuses BC, Nova Scotia, & New Brunswick.

CATO is the industry leader and a respected digital arts school for post secondary students. It is accredited by PPSEC.



Stenberg College – www.stenbergcollege.com

Vancouver & Surrey, British Columbia, Canada

Stenberg College offers post secondary diploma programs in the area of nursing and allied health care and accredited by PPSEC.

Recent HEG Projects

Listed below is a short list of our recent school development projects.

- ▶▶ FEASIBILITY STUDY & BUSINESS PLAN FOR A PRIVATE TRIBAL SCHOOL – ALABAMA, USA: HEG has been retained to implement a Feasibility Study and Business Plan for a new co-ed PreK-12 Tribal Private School in Atmore, Alabama, USA.
- ▶▶ BUSINESS PLAN FOR AN INTERNATIONAL SCHOOL – SAUDI ARABIA: HEG was retained to support the development of a business plan for submission to an investment group to start a new private for-profit PreK-12 international IB school in Riyadh, Saudi Arabia.
- ▶▶ COMPLETED A FEASIBILITY STUDY AND BUSINESS PLAN FOR A NEW INDEPENDENT GRADES 9-12 PREP SCHOOL – TORONTO, CANADA: HEG was retained to complete a full phone feasibility study and business plan for a new Grades 9-12 University Preparatory Private School formation project in Toronto, Ontario.
- ▶▶ COMPLETED A MARKET STUDY AND BUSINESS PLAN FOR A NEW PRIVATE INTERNATIONAL PREK-9 IB SCHOOL - MALAYSIA: HEG was retained to complete a full market study and business plan for a new PreK-9 International Private IB School formation project in Malaysia.
- ▶▶ BUY A CAREER COLLEGE AND LANGUAGE SCHOOL – CANADA: HEG was retained to assist a multinational firm to buy a career college and language school in Canada.
- ▶▶ OPEN THE FIRST NEW PRIVATE K-12 INTERNATIONAL IB SCHOOL FOR DOMESTIC KOREANS - SONGDO, KOREA: HEG was retained to open the first private international K-12 School for Korean domestic and international students in a new \$35 billion planned city of Songdo in Korea called Songdo International School.

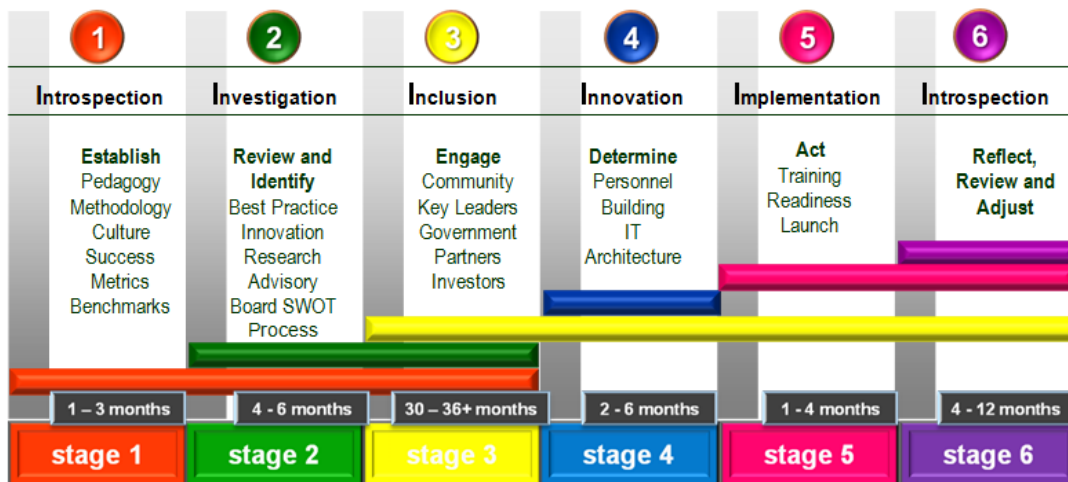
- ▶▶ INTERNATIONAL SCHOOL EVALUATION AND BOARD GOVERNANCE WORKSHOP - ULAANBAATAR, MONGOLIA: HEG was retained to complete school evaluation-assessment and full board governance workshop for a K-12 international baccalaureate school in Mongolia.
- ▶▶ COMPLETED A FEASIBILITY STUDY AND BUSINESS PLAN FOR A NEW PRIVATE INTERNATIONAL K-12 IB SCHOOL FORMATION PROJECT - PANAMA: HEG was retained to complete a full feasibility study and business plan for a new K-12 International Private IB School formation project in Panama City, Panama.
- ▶▶ PROVIDED SCHOOL FORMATION GUIDANCE FOR NEW INDEPENDENT ALTERNATE HIGH SCHOOL - WASHINGTON, DC: HEG was retained to advise on the formation of a new private alternate education High School in Washington, DC.
- ▶▶ OPEN THE FIRST NEW PRIVATE K-12 INTERNATIONAL IB SCHOOL FOR DOMESTIC KOREANS - SONGDO, KOREA: HEG was retained to open the first private international K-12 School for Korean domestic and international students in a new \$35 billion planned city of Songdo Korea called Songdo International School.
- ▶▶ DEVELOP TEACHER CONTRACTS & STAFF POLICY HANDBOOK FOR A K-8 SIKH SCHOOL - ALBERTA, CANADA: HEG reviewed and developed the Teacher Contract and Staff Policy Handbook for a K-8 Private Sikh School in Calgary, Alberta, Canada
- ▶▶ EVALUATION OF A K-9 ISLAMIC SCHOOL - ONTARIO, CANADA: HEG evaluated and developed a school improvement plan for a K-9 private Islamic School in Toronto, Ontario, Canada
- ▶▶ DEVELOP STRATEGIC PLAN FOR AN EXISTING & NEW PUBLIC SCHOOL DISTRICT - NEW HAMPSHIRE: HEG was retained to develop a strategic plan for an existing public school district and a new school district in New Hampshire, USA
- ▶▶ DEVELOP & ADMINISTER PILOT STUDENT ASSESSMENT SYSTEM – UAE: HEG was approached to develop/administer a pilot testing system for student performance using PISA in UAE school district.
- ▶▶ EVALUATION OF A SCHOOL SYSTEM – UAE: HEG was approached to implement an evaluation of an existing school system in the UAE, including assessment of student, staff, and leadership performance.
- ▶▶ FEASIBILITY STUDY & BUSINESS PLAN FOR A US INTERNATIONAL SCHOOL - GCC REGION: HEG was approached to implement a Feasibility Study and Business Plan for a proposed US International Accredited School in Egypt.
- ▶▶ SCHOOL ASSESSMENT - CALGARY, ALBERTA: HEG was retained to perform a school performance assessment of a private K-7 Sikh School in Calgary, AB.
- ▶▶ BUSINESS PLAN FOR A BRITISH COLUMBIA CERTIFIED SPORTS ACADEMY - VANCOUVER, BC: HEG completed a detailed start-up and operational business plan for a new K-12 BC certified sports academy in Vancouver, BC.

- ▶▶ BUSINESS PLAN FOR AN INTERNATIONAL SCHOOL – SINGAPORE: HEG was retained to support the development of a business plan for submission to the government of Singapore to start a new private for-profit K-12 international IB school.
- ▶▶ FEASIBILITY STUDY & DEVELOPMENT OF K-12 PRIVATE SCHOOL SYSTEM FOR THE NEW PLANNED CITY - MASDAR IN ABU DHABI, UAE: HEG was retained to advise on the development of the K-12 private school system and stand-alone private school for the new planned city of Masdar in Abu Dhabi, UAE. This includes the operation of the school(s).
- ▶▶ BUSINESS PLAN FOR A BRITISH COLUMBIA CERTIFIED OFFSHORE SCHOOL - ABU DHABI, UAE: HEG was retained to develop a detailed start-up and operational business plan for a new K-12 BC certified offshore school in Abu Dhabi, UAE.
- ▶▶ BRITISH COLUMBIA CERTIFIED OFFSHORE SCHOOL - BEIJING, CHINA: HEG was retained to oversee starting a K-12 BC certified offshore school in Beijing, China.
- ▶▶ NEGOTIATE PROPERTY LEASE FOR NEW SCHOOL - SAN FRANCISCO, CALIFORNIA: A K-12 private school in California retained HEG to negotiate the lease for a new Private School Preparatory Chinese Mandarin Immersion School in San Francisco, California.
- ▶▶ SCHOOL FORMATION STRATEGIC PLAN - CONNECTICUT, USA: HEG was retained by a Post Secondary For-Profit Allied Health School to advise on the formation of their school in Connecticut.
- ▶▶ FEASIBILITY STUDY & BUSINESS PLAN - MAUI HAWAII, USA: HEG was commissioned to implement a Feasibility Study and Business Plan for a new University Preparatory High School in Maui, Hawaii. HEG will also support starting the school.
- ▶▶ SCHOOL FORMATION STUDY - TEXAS, USA: HEG was retained to review starting a Prek-12 Adventist School Preparatory School in Texas.
- ▶▶ SCHOOL STRATEGIC PLAN - PITT MEADOWS, BC: HEG was retained to develop the strategic plan for PreK-9 International Baccalaureate Private School in Vancouver, British Columbia.
- ▶▶ SCHOOL STRATEGIC PLAN - TENNESSEE, USA: HEG was retained to develop the strategic plan for an Adventist Senior Boarding School in Tennessee, USA.
- ▶▶ BUSINESS PLAN DEVELOPMENT- ONTARIO, CANADA: HEG was commissioned to develop a comprehensive business plan for a new University Preparatory Day-Boarding Multi-Sport Elite High School in Toronto, Ontario, Canada.
- ▶▶ START A VOCATIONAL & TECHNOLOGY INSTITUTE - SURREY, CANADA: A group wanting to start a Post Secondary Technical and Vocational in BC has retained HEG to oversee the complete formation of their institute from the ground up in Surrey, BC.
- ▶▶ SCHOOL INSTITUTIONAL ASSESSMENT - VANCOUVER, BC: HEG was retained to perform an institutional assessment / financial projections related to the acquisition-merger of a Private K-12 School in Vancouver, BC.

- ▶ PROJECT MANAGEMENT - MINISTRY OF EDUCATION - SCHOOL OF THE FUTURE - BRITISH COLUMBIA, CANADA: HEG was retained to provide project oversight for the development of a proposed School of The Future project in British Columbia, Canada.

Conceptual Development Of Your School

Without a solid foundation and groundwork, a structure will collapse. That's why establishing a school requires exceptional planning, experience, and a commitment to a clear vision. The mechanics of school formation can be challenging and rife with pitfalls. In today's complicated education environment, the need to work smarter and be ready for the first day of operation is critical and can't be repeated. As a conceptual model, school formation is divided into 6 key stages:



Additional Services

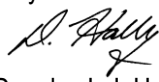
HEG offers a diverse range of services to serve its clients in the education sector. We provide customized solutions, including:

- ▶ Independent-Private School Formation
- ▶ Mergers, Sales, and Acquisitions of Schools
- ▶ Site Selection and Zoning
- ▶ Advising on financial structures and Grants
- ▶ Government Education Regulatory Relations
- ▶ School Management Services
- ▶ Strategic Planning
- ▶ Board Governance
- ▶ Head of School Evaluation & Support
- ▶ Executive & Faculty Searches
- ▶ Institutional Assessments & Audits
- ▶ Publication Development & Admissions
- ▶ International Marketing & Recruiting
- ▶ Market and Constituency Surveys
- ▶ Policy, Handbook, & Bylaw Development
- ▶ Fundraising & Development
- ▶ School Formation and Expansion

Please take your time in looking over this overview and contact me at 604-868-0002 or email me at info@halladayeducationgroup.com if you've any questions. I'm looking forward to working with you and your team.



To your success,



Douglas L.J. Halladay
 President