

“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: A full-day meeting with clients to determine scope of the project, feasibility/costs of your vision, and critical steps to move forward (**NOTE: This fee can be credited to the service #4**).

- ▶▶ 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:
 - 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 the proposed school and determine detailed costs and action plan.

The Feasibility Study will be developed in 4 stages:

1. Vision Session: Develop a draft vision, mission, values, and/or educational philosophy for the proposed school with the client.
 - ▶▶ Determine the proposed need and demand for the school;
 - ▶▶ Refine the *Feasibility Survey Tool* begin an initial assessment of the community, school location-development-competition, and who should attend the focus group meetings;
2. Community-Related Data Study:
 - ▶▶ In-depth Community Demographics Analysis;
 - ▶▶ Other schools within market;
3. Market Research:

8-16 weeks

TBD

- »» 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 leader in new and established public and private schools, including schools that are co-ed, all-girls, boarding, equestrian, international, ESL, largest learning disability school in Western Canada, and a founding Head. He has held positions as Superintendent, Head of School, Deputy Head, Senior School Director, Curriculum and Resources Coordinator for the Ministry of Education, and K - 12 teacher. He has accreditation experience with NAIS, CAIS, ISA, WASC, IBO, and BC. He has been a Department Head, Accreditation Committee Chair, and a background in Training in Clinical Supervision. Doug's credentials include: B.A. from SFU; Teaching Certificate from UBC, and a M.A. from SDSU; and a Fund Raising Certificate from the Institute of Charitable Giving. Mr. Halladay has a comprehensive knowledge of K - 12 educational trends with experience developing 20% of BC's current curriculum and policies.



Bill Wan – Senior 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 the 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.

Gary Diamond - Ontario-Based Program, WASC, International School Formation Specialist Gary



is experienced starting Canadian-based International schools. Gary was a Senior Education Officer with the Ontario's Ministry of Education where he held the positions of Provincial Coordinator of Private Schools. Gary has experience as a teacher, Department Head, and Principal in Ontario's private and public schools. As Provincial Coordinator of Private Schools Gary was responsible for creating and monitoring agreements between international schools that wished to offer a Canadian curriculum and the Ontario Ministry of Education.

He has worked with international schools in China, Hong Kong, Mongolia, India, Malaysia, Singapore, United Arab Emirates, Romania, Trinidad and Tobago, and Europe. He has worked with international schools to assist them with guidance to offer a Canadian program; recruiting teachers and administrators for overseas schools; review of curriculum to ensure consistency with ministry guidelines; and assisting overseas schools with implementing the International Baccalaureate program and the W.A.S.C. accreditation process.

Bob Pearmain – International Baccalaureate and Search Specialist: Bob has been involved in K-12



education for + 40 years. He served as a secondary school Principal and Associate Superintendent with the 50,000 student strong Vancouver School Board. He introduced the IB Diploma Program at his school and quickly became involved in the governance of the Organization serving as the first non-European President of the Heads of IB Schools Association, President of IBNA and the Caribbean, and Secretary to the IBO Governing Council of Foundation. Internationally, he has visited schools on every continent and served on 4 Council of International Schools accreditation teams, in addition to serving or

leading +75 IBNA pre authorization school visits. Bob has been involved in the formation, growing, and nurturing of independent schools in Canada and the United States and the searching for Heads of Schools and teachers for international schools in Asia, the Middle East and North America.

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 in 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. Jim has +40 years of Christian Education experience, 34 years as a Principal of Christian Schools, and Superintendent of 3 of the largest PreK-12 Christian Schools in the US. He has served on the Association of Christian School International Board, and representative for ACSI and NGOS Boards. He has an understanding of Christian education from the Board down He has served on 5 accreditation teams for ACSI and the ACSI National Board. He has provided oversight to budgets of +\$45 million.



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 for IBO, MSACS, CIS, NEASC, and WASC.



Greg Clark – Educational Site Selection, Negotiation, and Development Specialist: Greg, a lawyer by profession, completed degrees in Commerce and Law from the University of BC. Greg was responsible for site selection, negotiation, and development of some of the top Independent Schools in North America, as well as being part of the site selection team for a new campus at an established university in BC. He has extensive experience in the legal field, serving in a strategic role for a major US real estate developer, holding positions on the boards of global affiliates of Fortune 500 companies. He has served University of BC as Chair of the Alumni Association. He recently served as Vice President Brokerage Operations and Counsel for Sotheby's International Realty Canada. This, coupled with extensive real estate development experience, enhances his ability to be helpful in real estate selection, finance, and development in the education sector.



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.



Thaddeus Monckton – ESL and Language School Specialist: Thad is the founder, CEO, and owner of Pan Pacific International English College (PPIEC) - Study Canada, located in Victoria, British Columbia. He has extensive experience with International Education in Canada, United States, and overseas. He 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 offers intensive adult ESL, summer youth ESL, High School Prep, the GAC University Foundation Certificate, TOEIC, Business English, and TESL Canada recognized Diploma Program.






Carl Savage – BC-Based 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 BC-certified school Principal. He is experienced with starting BC-based international schools in China and the Middle East and accreditation requirements, and recruiting teachers for offshore schools.



Related School Formation Projects

The following schools have been started by our team of Associates:

INTERNATIONAL PROJECTS		
	<p>Dalian Maple Leaf International High School –www.mapleleafschools.com</p> <p>Students are registered as BC students and write the same Grade 10, 11, and 12 BC examinations as resident students in BC and graduate with the same BC Ministry of Education transcripts and graduation (Dogwood) diploma as resident students in BC. English program taught by BC certified teachers. Inspected annually on-site and certified by BC Ministry of Education. Over 2,300 students are currently enrolled.</p>	<p>Jinshitan, Dalian, China</p>
	<p>Chatsworth International School – www.chatsworth.com</p> <p>Caters to 720 students, aged 3 to 18 years, from over 45 different nationalities, with an international curriculum based on the British and American models, and an extensive ESL Programme. Chatsworth has WASC accreditation (Western Association of Schools and Colleges) is a fully authorized IB Diploma school and is a recognized IGCSE centre.</p>	<p>Singapore</p>
	<p>The American School of Ulaanbaatar – www.asu.edu.mn</p> <p>ASU is a co-educational, non-sectarian international school that offers a unique Pre-school to Grade 12 program in Mongolia. It is the first elementary and secondary school in Mongolia with a fully equipped learning facility in accordance with international standards of WASC and the Ontario curriculum.</p>	<p>Ulaanbaatar, Mongolia</p>
	<p>Canadian School of India – www.cisb.org</p> <p>PreK-12 day/boarding, co-ed school that uses the Ontario and International Baccalaureate curriculum, and enriched to meet the needs of international students. CIS is an overseas inspected private school, authorized by the Ministry of Education in Ontario to grant secondary school credits and the Ontario Secondary School Certificate. Each year an Education Officer from the Ministry spends a week at CIS to evaluate procedures and practices to ensure compliance.</p>	<p>Bangalore, India</p>
	<p>British Columbia Canadian International School of Cairo – www.bccis.net</p> <p>It offers the British Columbia program from pre-school to 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.</p>	<p>Cairo, Egypt</p>

US-BASED PROJECTS		
	<p>Island Pacific Academy (IPA) – www.islandpacificacademy.com</p> <p>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.</p>	<p>Kapolei, Hawaii, USA</p>
	<p>Sage Hill School – www.SageHillSchool.org</p> <p>SHS is a Grade 9-12, Coed 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</p>	<p>Newport, California. USA</p>

amphitheater. It has an enrollment of 450 students. It is accredited by WASC, NAIS, CASE, and CAIS.



Santa Ynez Valley Christian Academy – www.syvca.com

Santa Ynez is a Grades K-8 Private Interdenominational, coed, religious, nonprofit 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 coed, non-denominational, university 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, university 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, university 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 the ISA, CAIS.

Vancouver,
British
Columbia,
Canada



Southpointe Academy – www.southpointeacademy.ca

Southpointe is an independent, Prek-12, university 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 musical.

Lax Kw'alaams,
British
Columbia,
Canada

POST SECONDARY PROJECTS



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

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

Campuses B.C.,
Nova Scotia, &
New
Brunswick.



Pan Pacific International English College - www.victoriaesl.com

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

Victoria, British
Columbia,
Canada



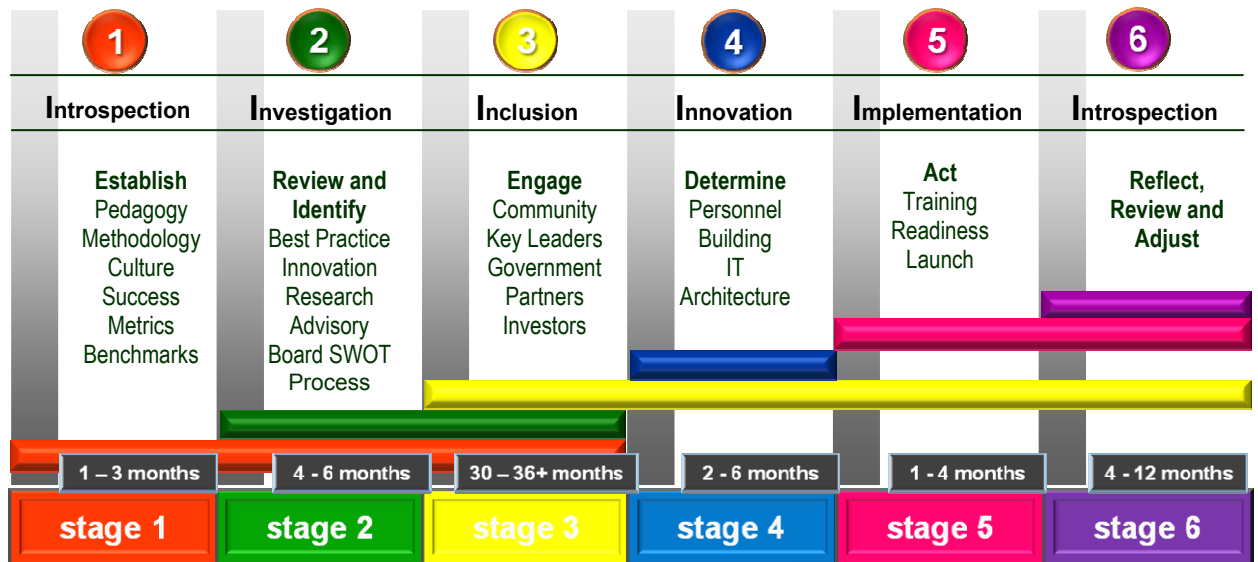
Stenberg College – www.stenbergcollege.com

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

Vancouver &
Surrey, 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, wish to set a date for our next step, or would like to finalize arrangements. I'm looking forward to working with you and your team.



To your success,

Douglas L.J. Halladay
President and Founder