

CAIS

Membership Application Package

June 2020

CAIS

Canadian Accredited Independent Schools
CAIS.CA | BOARDINGSCHOOLS.CA

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CAIS Vision, Mission & Values

Our Vision

To be the standard of excellence in learning and leadership, shaping the future of education.

Our Mission

To pursue continuous whole school improvement through accreditation, exemplary leadership development, research, and national collaborative initiatives.

Our Values

STUDENT-CENTERED

The students of our schools are the reason we exist. Strong schools can inspire students, who can, in turn, change the world. Everything we do must ultimately support the learning and development of students.

EXCELLENCE

Excellence is a constant and deliberate quest. Our schools share a passion for continuous improvement and innovation to support their commitment to educational excellence and long-term sustainability. Our commitment is to deliver excellence to our members in everything we do.

RELEVANCE

We best serve our schools by focusing on issues and programs that are relevant to our standards and support school improvement and innovation.

INQUIRY & UNDERSTANDING

We are committed to and promote life-long education, inquiry and independent thinking, the protection of human rights, and understanding and respect for differing perspectives and diversities among people.

LEADERSHIP

Exemplary leadership is the essential ingredient to continuous improvement and innovation. Our role is to shepherd, steward, and serve school leaders.

COLLABORATION

Collaboration fuels creativity and leverages resources. By working together within our community and with others on common issues, we bring greater value to all of our schools and to our students.

NATIONAL & GLOBAL PERSPECTIVE

We address national issues that affect our members within the context of a rapidly changing globalized world.

Welcome Letter

Dear School Leader,

We are pleased that you are exploring the pathway towards CAIS Membership and look forward to supporting you through the process. Member and Candidate schools have access to all CAIS privileges, including:

Professional Development and Career Resources

- National Leaders Conference
- Heads & Chairs Conference
- Leadership Institute including Introduction to Independent School Leadership, Diploma Program, Next Step Program
- Strategic Change Accelerator
- Access to online Leadership Development, e.g. webinars and learning series
- Job posting on our highly visited Career Board

Research

- Annual and Ad Hoc Research Projects
- Innovation Grants
- CAIS Connect (Resource portal)
- Research Surveys (including Benchmarking, Heads Compensation and Senior Leadership Compensation)

Collaboration and Networking Opportunities

- National Networks and sharing of knowledge, e.g. Network Zoom meetings and LinkedIn groups
- National Collaborative Initiatives, e.g. Canadian Boarding Collective and CAIS Green Schools
- Volunteer opportunities such as Professional Learning Event planning committees

CAIS Accreditation drives each school to continually strive for excellence, be more intentional in its practices and be accountable to all of its constituents. Our accreditation process aligns with the highest National Standards, guiding schools through a continuous whole school improvement process that combines both an internal self-evaluation and an external peer review.

Completion of an application is the next step towards achieving Candidate Status.

If you have any questions, please contact Catherine McCauley, Director of Accreditation & Research at cmccauley@cais.ca.

Sincerely,





Patti MacDonald,
Executive Director, CAIS


Steps to Becoming a CAIS Member School


Application Process for Candidate Status

- 1 Schools wishing to apply for CAIS membership should contact Tracey Nolan at the CAIS office at tnolan@cais.ca to arrange a time to speak with the Executive Director Patti MacDonald about CAIS, the value of membership and the accreditation process. In order to apply for membership, schools have to be in continuous operation and viable for at least five years.
- 2 Initial meeting of the CAIS Executive Director with the Head of School, Leadership Team and the Board of the School.
- 3 Submit an application package and pay the application fee.

 **TIMING** *Following an initial visit to the school from the CAIS Executive Director.*
- 4 CAIS reviews the application and contacts the Head of School to arrange a one-day visit by the Applicant School Review Team composed of two CAIS School Heads (one being a CAIS Board member) and a Business Officer.

 **TIMING** *Within one month after application received.*
- 5 One-day visit conducted by Applicant School Review Team on a mutually agreed date.
- 6 The Applicant School Review Team submits a report including a recommendation on whether the applicant is ready to become a Candidate. This is put forward to the CAIS Evaluation Council. All information will remain confidential to CAIS and the Applicant School Review Team.

 **TIMING** *Report finalized within one month following the visit from the Review Team.*
- 7 The CAIS Evaluation Council reviews the report and makes a recommendation to the CAIS Board of Directors, which makes all final decisions on applicant acceptance.

 **TIMING** *The report will be discussed at the next Evaluation Council meeting and the next scheduled Board meeting (five meetings per year).*

8 Following the CAIS Board meeting, the applicant will receive a letter from the CAIS Executive Director detailing the Board’s decision. The applicant will also receive a summary of the Applicant School Review Team’s report outlining the observed areas of strength and areas for improvement.

9 If Candidate Status is granted, the school will prepare for a Full Accreditation Visit, meeting all National Standards and engaging in a self-study internal review process.

 **TIMING** *Full Accreditation Visit will occur within three years after a school becomes a Candidate.*


10 If Candidate Status is not granted, the school will be invited to re-apply in the future.

11 Within three years of the CAIS Board’s decision to grant Candidate Status, a date will be scheduled for the first Full Accreditation Visit, based on the National Standards and Indicators of Effective Practice. This four-day Accreditation Visit follows a 12-18-month internal evaluation process based on the CAIS National Standards, Indicators of Effective Practice and Guiding Questions.

 **TIMING** *Full Accreditation Visit is arranged on a mutually agreed date with the Director of Accreditation & Research.*

12 The resulting Accreditation Visiting Committee Report will be presented to the CAIS Evaluation Council, which will make a recommendation to the Board on the application for full CAIS Member School status.

13 Should it be determined in the Accreditation Review that a Candidate school is not meeting any of the CAIS National Standards, the Candidate school will have one year to successfully address the recommendations within the Standards not met. Failure to do so will result in membership being denied.

 **TIMING** *Most schools take four years from application to acceptance as a full CAIS Member School.*

14 The CAIS Board of Directors makes all final decisions on member acceptance.

Candidate Application Process Overview

All schools are required to complete the entire application package.

The following shall be submitted to apply for CAIS Candidate Status:

► **SUBMIT APPLICATION BY EMAIL** to Catherine McCauley, Director of Accreditation & Research at cmccauley@cais.ca.

- a. A signed letter from the Head of School providing:
 - an outline of why the school would like to become a CAIS member
 - a high-level summary of the school's current position in relation to the CAIS Standards, including reference to the areas where there is strength as well as those that will require improvement.

- b. All CAIS forms within this document:
 - CAIS Expectations
 - School Information
 - Head of School Letter of Compliance
 - Board Chair Letter of Compliance
 - Candidate Application Supporting Documentation
 - School Overview Charts

► SUBMIT PAYMENT

The Application Fee of \$1,000 can be submitted as follows:

1. By credit card by filling in the [online payment form](#)

2. By cheque payable to Canadian Accredited Independent Schools. Please send the cheque to the CAIS office:

Margo Jakobschuk, Business Coordinator
CAIS
PO Box 56
Jordan, ON L0R 1S0

CAIS staff will review the submitted application and supporting materials. Once confirmed, the Director of Accreditation & Research will contact the Head of School to schedule the one-day visit conducted by the Applicant School Review Team.

CAIS Expectations

 **CAIS FORM: EXPECTATIONS OF CANDIDATE SCHOOLS.** Please fill in the necessary details and return by email.

Expectations of Candidate Schools

1. The school operates ethically and within all laws, statutes and regulations in the jurisdiction in which it is located.
2. The school has a governing body acting at arm's length from the administration of the school. This Board is elected and structured to oversee the school mission, vision, values and strategy. The day-to-day operations are managed by the Head of School, who is the Chief Executive Officer and reports to the Board of Governors.
3. The school demonstrates support for the CAIS vision, mission, and values.
4. The school has been in continuous operation and viable for at least five years.
5. The school's statement of purposes and objectives reflects sound educational and social goals. The school maintains high standards of character and behaviour for its students, in addition to providing academic preparation for higher education.
6. Heads and Chairs are expected to attend the annual CAIS Heads & Chairs Conference during which an Annual General Meeting is held.
7. The school has its first Full Accreditation Visit within three years at which time it is expected to have met all CAIS National Standards.
8. The school participates in annual Research Projects, including Benchmarking and Compensation Surveys.
9. The school pays annual membership fees based on school enrolment. Annual membership fees begin upon acceptance as a Candidate and are prorated based on the date of acceptance.
10. The school submits an Annual Membership Report.
11. The school adheres to all [CAIS Policies](#).

12. The school is responsible for any travel and accommodation expenses incurred by the members of the Applicant School Review Team.

13. The school supports the following programs and services:

- National Leaders Conference
- Leadership Institute including Introduction to Independent School Leadership, Diploma Program, Next Step Program
- Strategic Change Accelerator
- Ad Hoc Research Projects
- Student Leadership Conferences for Middle/Senior School students
- Athletic tournaments
- Canadian Boarding Collective (if applicable)

Additional expectations of schools once membership status is acquired

1. Schools vote at the Annual General Meeting.

2. The Head of School participates in an accreditation review at least every three to four years and supports accreditation by regularly offering school leaders for Visiting Committee reviews.

3. The school undergoes an accreditation review every seven years. The school is responsible for any travel and accommodation expenses incurred by the members of the Accreditation Visiting Team.

SIGNATURE OF HEAD OF SCHOOL

DATE OF APPLICATION (MM/DD/YYYY)

School Information

 **CAIS FORM: SCHOOL INFORMATION.** Please fill in the necessary details and return by email.

SCHOOL NAME

CORPORATE NAME (IF DIFFERENT FROM THE SCHOOL)

SCHOOL MAILING ADDRESS

OTHER CAMPUS MAILING ADDRESS

OTHER CAMPUS MAILING ADDRESS

OTHER CAMPUS MAILING ADDRESS

SCHOOL PHONE NUMBER

SCHOOL WEBSITE

HEAD OF SCHOOL NAME

SCHOOL FOUNDING DATE (MM/DD/YYYY)

DATE OF INCORPORATION (MM/DD/YYYY)

SCHOOL CHARITABLE REGISTRATION # (IF APPLICABLE)

DATE OF INITIAL CHARITABLE REGISTRATION (MM/DD/YYYY)

FOUNDATION (IF APPLICABLE)

FOUNDATION'S CHARITABLE REGISTRATION #

SCHOOL CONTACT PERSON NAME

SCHOOL CONTACT PERSON EMAIL

DATE OF APPLICATION (MM/DD/YYYY)

Head of School Letter of Compliance

 **CAIS FORM: HEAD OF SCHOOL LETTER OF COMPLIANCE.** Please fill in the necessary details and return by email.

I, the undersigned, agree that I have read and understood the National Standards which govern CAIS member schools. I believe that (School): _____ is able to meet the National Standards established by CAIS within three years and I do hereby promise that, should our school be accepted as a Candidate Member of CAIS, it will be committed to continuous whole school improvement and meeting of the National Standards, meet the expectations for membership and agree to follow the [CAIS Membership Guidelines](#).

Any material failure by a school to meet the above expectations will be reviewed by the CAIS Board of Directors and could, at the CAIS Board's discretion, lead to suspension or revocation of the school's membership.

The following statements are true:

1. The Head of School operates the school at arm's length from the Board of Governors.
2. The Head of School reports directly to the Board of Governors. All other employees are hired and managed by the Head of School.
3. The school's finances are sound.
4. Enrolment is stable.
5. The school meets all standards required by the local Ministry of Education.
6. The school practices ethically in the recruitment of students and staff members. The school will not actively recruit students or staff members from CAIS member schools.
7. As Head of School, I understand that attendance of both myself and Board Chair is expected at the October Heads & Chairs Conference and the AGM.
8. I understand that CAIS is an active organization that requires members to participate in a variety of activities. Our school will participate in required CAIS activities and support those that are appropriate for our school.
9. I have read the most recent National Standards and believe our school will be able to meet them within three years.

SIGNATURE OF HEAD OF SCHOOL

WITNESSED BY

DATE (MM/DD/YYYY)

DATE (MM/DD/YYYY)

Board Chair Letter of Compliance

 **CAIS FORM: BOARD CHAIR LETTER OF COMPLIANCE.** Please fill in the necessary details and return by email.

I, the undersigned, agree that I have read and understood the National Standards which govern CAIS member schools. I believe that (School): _____ is able to meet the National Standards established by CAIS within three years and I do hereby promise that, should our school be accepted as a Candidate Member of CAIS, it will be committed to continuous whole school improvement and meeting of the National Standards, meet the expectations for membership and agree to follow the [CAIS Membership Guidelines](#).

Any material failure by a school to meet the above expectations will be reviewed by the CAIS Board of Directors and could, at the CAIS Board's discretion, lead to suspension or revocation of the school's membership.

The following statements are true:

1. The Head of School is the Chief Executive Officer of the School.
2. The Board operates at arm's length from the operations of the school.
3. The school meets all standards required by the local Ministry of Education. The school is in good standing.
4. The Board considers that the school is in a healthy financial condition. The Board considers that the school's viability is not in jeopardy.
5. The Board fully supports this application for Membership to CAIS.

SIGNATURE OF BOARD CHAIR

WITNESSED BY

DATE (MM/DD/YYYY)

DATE (MM/DD/YYYY)

Candidate Applicant School One-Day Visit Logistics

As described in the timeline on page 5, CAIS will arrange for a one-day visit by the Applicant School Review Team. Before the visit, the Review Team will review the application and supporting documentation. During the visit, the Review Team will meet with various members of the school community to ask questions and look for evidence that the school will meet the CAIS National Standards within three years.

SAMPLE SCHEDULE*	
8:00am	Breakfast meeting with the Head of School
9:00am	School tour led by students
10:15am	Meeting with Director of Finance/Classroom visits
11:00am	Meeting with Director of Admissions/Classroom visits
11:30am	Meeting with Director of Advancement/Marketing/Communications/Classroom visits
12:00pm	Lunch with Student Council
1:15pm	Meet with Academic Leaders (Divisional Principals, Director of Teaching and Learning)
2:15pm	Meet with the Director of Student Life
3:15pm	Observe a Senior Leadership Team Meeting
6:00pm	Meeting with the Head of School and Chair of the Board
	Dinner with Head of School (if time permits)

***Details of schedule to be confirmed with the Head of School when planning the visit.**

ONE-DAY APPLICANT VISIT - EXPENSE OVERVIEW

1. The Applicant School is responsible for all costs associated with the visit.
2. The Applicant School Review Team members will be responsible for making their own travel arrangements.
3. Hotel accommodation and meals during the visit will be arranged by the Applicant School.
4. CAIS will initially reimburse Applicant School Review Team members for reasonable travel expenses incurred through participation in the One-Day Visit. Following the review, CAIS will invoice the Applicant School for the total of the reimbursed expenses.
5. The Applicant School Review Team will follow the Visiting Committee Travel Guidelines Policy (CAIS Policy O-202, Travel & OG-202 CAIS Travel Guidelines). This document is found in [CAIS Policies](#).

Candidate Application Supporting Documentation

 **CAIS FORM: CANDIDATE APPLICATION SUPPORTING DOCUMENTATION.** Please fill in the necessary details and return by email.

As part of the application process, schools are asked to provide a selection of key documents related to the CAIS National Standards.

Links to supporting documentation must be provided in the appropriate sections below.

In addition, all supporting documentation must be placed in a folder, with the link to the folder provided below. This will ensure proper archiving of your application:

FOLDER FOR ALL DOCUMENTATION:

Please ensure all links have no expiry date and have the sharing & download permission set as "Anyone who has the link can access. No sign-in required." Since this is a fillable PDF form, these links will be copied and pasted by CAIS staff. Please paste the original links.

▶ Standard 1: Mission, Vision, Values and Strategy

PASTE LINK ABOVE FOR **STRATEGIC AND/OR BRIDGE PLAN, INCLUDING THE MISSION, VISION, VALUES**

PASTE LINK ABOVE FOR **STRATEGIC IMPLEMENTATION PLAN, INCLUDING TACTICS, TIMELINES, AND MEASURES**

▶ Standard 2: Co-Curriculum and the Learning Environment

PASTE LINK ABOVE FOR **LIST OF CO-CURRICULAR OFFERINGS, INCLUDING ARTS, ATHLETICS, AND LEADERSHIP**

▶ Standard 2: Co-Curriculum and the Learning Environment (Continued)

PASTE LINK ABOVE FOR **STUDENT HANDBOOK**

PASTE LINK ABOVE FOR **PARENT HANDBOOK**

PASTE LINK ABOVE FOR **STUDENT COUNSELLING/GUIDANCE PROGRAM OVERVIEW**

▶ Standard 3: Academic Program

PASTE LINK ABOVE FOR **PUBLISHED DEFINITION OF EXCELLENCE IN TEACHING AND LEARNING**

PASTE LINK ABOVE FOR **OVERVIEW OF THE ACADEMIC PROGRAM THAT SHOWS EVIDENCE OF STRATEGY, INNOVATION AND HOW STUDENTS LEARN**

PASTE LINK ABOVE FOR **MOST RECENT MINISTRY OF EDUCATION INSPECTION REPORT**

▶ Standard 4: School Leadership

PASTE LINK ABOVE FOR **ORGANIZATIONAL CHART**

PASTE LINK ABOVE FOR **THE AGENDAS OF THREE RECENT MEETINGS OF THE STAFF, FACULTY AND LEADERSHIP TEAM**

PASTE LINK ABOVE FOR **SUCCESSION PLAN FOR LEADERSHIP TEAM**

▶ Standard 5: Human Resources

PASTE LINK ABOVE FOR **STRATEGIC HUMAN RESOURCES PLAN**

PASTE LINK ABOVE FOR **PROFESSIONAL GROWTH AND EVALUATION PROCESS(ES)**

PASTE LINK ABOVE FOR **FACULTY AND STAFF HANDBOOK**

▶ Standard 6: School and Community

PASTE LINK ABOVE FOR **STRATEGIC ADVANCEMENT PLAN**

PASTE LINK ABOVE FOR **THE LAST THREE YEARS OF FUNDRAISING METRICS AND ACTUALS**

PASTE LINK ABOVE FOR **MARKETING AND COMMUNICATION PLAN**

▶ Standard 7: Enrolment Management

PASTE LINK ABOVE FOR **STRATEGIC ENROLMENT MANAGEMENT AND RETENTION PLAN**

▶ Standard 8: Governance

PASTE LINK ABOVE FOR **BOARD AND COMMITTEE GOALS AND WORK PLANS FOR THE CURRENT YEAR**

PASTE LINK ABOVE FOR **LIST OF CURRENT TASK FORCES/AD HOC COMMITTEES ALONG WITH OBJECTIVES AND TIMELINES**

▶ Standard 8: Governance (Continued)

PASTE LINK ABOVE FOR **MOST RECENT BOARD EVALUATION**

PASTE LINK ABOVE FOR **MOST RECENT HEAD'S REPORT TO THE BOARD, INCLUDING FINANCIAL, ENROLMENT AND HUMAN RESOURCES REPORTS AS THEY RELATE TO THE IMPLEMENTATION OF STRATEGY AS WELL AS STRATEGIC PLAN UPDATES**

▶ Standard 9: Finance

PASTE LINK ABOVE FOR **LONG-RANGE STRATEGIC FINANCIAL PLAN**

PASTE LINK ABOVE FOR **A BRIEF OVERVIEW OF THE SCHOOL'S FINANCES FOR THE PAST 3-5 YEARS**

PASTE LINK ABOVE FOR **MOST RECENT AUDITED FINANCIAL STATEMENTS FOR THE SCHOOL AND THE FOUNDATION, IF APPLICABLE**

▶ Standard 10: Physical Plant, Health and Safety

PASTE LINK ABOVE FOR **HEALTH, SAFETY AND CHILD PROTECTION POLICIES**

▶ Standard 10: Physical Plant, Health and Safety (Continued)

PASTE LINK ABOVE FOR **EMERGENCY RESPONSE PLANS, INCLUDING BUT NOT LIMITED TO:**

- i. building evacuation**
- ii. medical emergency**
- iii. procedures for a threat inside and outside the building**

PASTE LINK ABOVE FOR **SCHOOL INSURANCE POLICIES AND ANALYSIS**

▶ Standard 11: Commitment to School Improvement

PASTE LINK ABOVE FOR **SCHOOL CONSTITUENT SURVEYS (INCLUDING RESULTING DATA AND ANALYSIS) COLLECTED IN THE PAST TWO YEARS**

▶ Standard 12: Boarding (if applicable)

PASTE LINK ABOVE FOR **UNIQUE VALUE PROPOSITION FOR BOARDING**

PASTE LINK ABOVE FOR **BOARDING PROGRAM AND PHILOSOPHY**

PASTE LINK ABOVE FOR **EMERGENCY POLICIES AND PROCEDURES (FOR EVENINGS AND WEEKENDS)**

▶ Standard 12: Boarding (if applicable) (Continued)

PASTE LINK ABOVE FOR **STUDENT AND PARENT HANDBOOKS**

PASTE LINK ABOVE FOR **SUPERVISION SCHEDULE SHOWING BOARDING COVERAGE FOR A SEVEN-DAY PERIOD**

▶ Standard 12 B: Homestay (if applicable)

PASTE LINK ABOVE FOR **HOMESTAY PROGRAM AND PHILOSOPHY**

PASTE LINK ABOVE FOR **SAMPLE CONTRACT FOR HOMESTAY FAMILIES**

PASTE LINK ABOVE FOR **CONTRACT WITH THIRD-PARTY PROVIDER, IF APPLICABLE**

PASTE LINK ABOVE FOR **HOST FAMILY, STUDENT AND PARENT HANDBOOKS**

2. ENROLMENT AND ATTRITION

	Last Year	3 Years Ago	5 Years Ago
Number of student applications			
Number of student acceptances			
Admissions Yield Rate			
Average per student Financial Aid disbursed (including scholarships)			
Student population at the start of the school year			
Number of students asked/encouraged to withdraw during or at the end of the school year			
Number of non-graduates voluntarily withdrawing during or at the end of the school year			
Number of graduates at the end of the school year			

Average Class Size

Division Name	Last Year	3 Years Ago	5 years Ago

3. STUDENT POPULATION

	Boarding	Day
Junior (K-8)		
Senior (9-12)		
Totals		

4. FINANCIAL STATISTICS

% Investment in Professional Development	
Annual surplus as a % of operating expenses	
% of local grid of faculty salary	
Amount raised annually (\$)	
Cost to raise a dollar (\$)	
% Parent Participation in Annual Fund	
% Staff Participation in Annual Fund	
% Board Participation in Annual Fund	
% of revenues from fees	

5. SCHOOL LEADERSHIP

	Title	Name	# of Years in Position
Head of School			
Academic Program (i.e. Jr Head, Sr Head, etc.)			
Co-Curricular Program			
Human Resources			
Advancement			
Enrolment			
Finance			
Facilities			
Marketing and Communications			
IT			
Boarding Program			

Staff attrition rate: _____

CAIS

National Standards & Effective Practices

2019



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1

Mission, Vision & Strategy

The school has clear mission, vision, values and strategy. These statements are understood and accepted by all constituencies: Board, faculty, staff, parents, alumni, and students. The statements give direction to the Strategic Plan (including curricular, co-curricular, financial, organizational) to ensure that all facets of school life are in alignment.

- 1.1 The school has clear statements of mission, vision and values. They are short, memorable, aspirational and achievable.
- 1.2 The school has a current integrated strategic plan (including HR, program, finance, facilities, enrolment, advancement) that demonstrates adherence to its mission, vision, and values and articulates the school's unique value proposition.
- 1.3 The school demonstrates adherence to its vision, mission, values, and strategy in the development and implementation of the Strategic Plan.
- 1.4 The school's Strategic Plan includes an Implementation Plan that is updated annually based on research and/or changes to the current landscape.
- 1.5 The school effectively communicates the school's mission, vision, values and strategy to all members of the school community.

- 2.6 The school encourages all students to engage in fitness through opportunities to participate in sports and physical activities.
- 2.7 The school encourages the involvement of all students in its program of co-curricular activities.
- 2.8 The school offers all students opportunities for and instruction in leadership development.
- 2.9 The school is an ethical community that promotes integrity, honesty and self-discipline.
- 2.10 The school has appropriate and effective procedures for counseling of all students; the school uses effective referral practice when issues surpass the skills or capacity of school personnel.
- 2.11 The school includes in its reports to parents, information on the student's academic, emotional, social, and physical development.
- 2.12 The school has effective procedures for timely reporting to parents on all aspects of students' progress and offers suggestions for assisting them.
- 2.13 The school models and promotes wellness.
- 2.14 The faculty and staff consistently model the vision, mission, and values of the school.
- 2.15 The school encourages students to take responsible risks and learn through both their failure and success.
- 2.16 Policies and practices are in place to ensure that teachers, parents and students work collaboratively and actively to pursue positive, respectful, and appropriate relationships.



2

Co-Curriculum & the Learning Environment

The school promotes and acts upon the academic, emotional, physical and social potentials of all its members within an ethical community.

- 2.1 The school promotes inquiry and independent thinking.
- 2.2 The school promotes understanding and respect for the differences and diversities among people.
- 2.3 The school demonstrates its commitment to service and citizenship in the broader local, national and global communities by encouraging all students to meaningfully participate and teaching the skills of citizenship.
- 2.4 The school advocates and demonstrates positive practices with respect to environmental issues.
- 2.5 The school encourages the involvement of all students in cultural development, through musical, dramatic and artistic expression, appreciation, and/or study.



3

Academic Program

The school's program is congruent with its mission and strategy; it is based upon an articulated philosophy and research about the ways in which students learn and effective ways to teach them.

- 3.1 Through an ongoing consultative process, the school has published a definition of excellence in teaching and learning that encompasses current research.
- 3.2 The school's program is dynamic and innovative to address the rapidly changing globalized world.
- 3.3 The school's academic program is strategic.
- 3.4 The school has a documented scope and sequence of the program that aligns with the strategy.
- 3.5 The school helps all students understand how they learn about, develop and apply a wide variety of strategies in which to learn.
- 3.6 The school's Information Technology plan is congruent with the school's strategy.
- 3.7 The resource centre (library) is a centre for learning and appropriately supports the program and strategy.
- 3.8 The school guides students to choose a current and post-secondary program that best suits their needs.
- 3.9 The school program provides opportunities for students to practice a repertoire of thinking skills.

- 3.10** Teachers recognize differences in learning styles and abilities and use an appropriate variety of instructional strategies to engage and challenge all learners.
- 3.11** The school has instructional materials and equipment available in sufficient quality, quantity, and variety to give effective support to the program.
- 3.12** The school provides program support to help students who struggle with learning.
- 3.13** The school's assessment policies and procedures are thoughtful and reflect attention to authentic performance tasks, multiple sources of evidence, educational goals and individual student learning.
- 3.14** The school ensures that all students receive feedback that is personal, timely and supports growth and development.
- 3.15** The school maintains appropriate academic records, which are protected against loss and available only to authorized persons, for both current and former students.
- 3.16** The program is designed to support students in the attainment of all essential learning outcomes identified by at least the provincial Ministry of Education.
- 3.17** The program is designed to engage all students in high quality online learning experiences by graduation.
- 3.18** There are established structures for teachers to meet to review and discuss the personalized learning of individual students.
- 3.19** There are established structures for teachers to meet to review and discuss the program and how it is challenging and engaging learners.
- 3.20** The school encourages students to be innovative, take responsible risks, and learn through both their failures and successes.
- 3.21** The preschool program (if applicable) operates in a way that assures a mission consistent experience for children.



School Leadership

The school has an overall administrative organization, which communicates, carries out and supports the school's mission and strategic plan.

- 4.1** The school's leadership team implements the strategic and operational needs of the school.
- 4.2** The leadership team supports the Board in the development of strategy and communicates progress through the Head of School.
- 4.3** The leadership team communicates effectively, insuring the internal audience (staff, students, Board) is informed about the school's policies, procedures and decisions.
- 4.4** The leadership team develops this strategy for the retention of students and engages employees in that process.



Human Resources

The school's Human Resources strategy is in place to ensure that the people practices and policies support the educational purpose of the school and are aligned with the vision, mission, values and strategies.

- 5.1** Organizational Effectiveness - Policies and procedures are in place to ensure succession planning and people development.
- 5.2** Recruitment and Retention - Policies and procedures are in place to ensure effective recruitment and retention of employees.
- 5.3** Selection - The school executes rigorous selection procedures that ensure all employees are suitable people to work with children and young adults, including verbal reference checks to the most recent employer.
- 5.4** Total Compensation Program - Policies and practices are in place to ensure fair and ethical treatment with regard to compensation and working conditions for all positions within the school.
- 5.5** Professional Growth Program - The school has a professional growth program that is aligned with the Strategic Plan and is aligned with its definition of excellence in teaching and learning. Faculty PD is resourced by a minimum of 2% of the budget for faculty salaries (excluding benefits).
- 5.6** Evaluation and Termination of Employment - Policies and practices are in place to ensure faculty evaluation and termination procedures are aligned with the school's definition of excellence in teaching and learning.
- 5.7** School Culture - Policies and practices are in place to ensure that teachers and staff work collaboratively and actively to pursue positive, respectful, and appropriate relationships with their students and with other adults in the school community.



School & Community

The constituent relations, communications, and fundraising programs of the school are well planned and effective, both serving the community and engaging them in achieving the school's mission. As well, the school has established systems and procedures to maintain harmonious relationships with the community in which it exists.

- 6.1** The school has a vision and strategy for the effective involvement of stakeholders (parents, alumni/ae, donors, friends, etc.).
- 6.2** The school has an established program to engage its constituents in a mutually beneficial manner to create meaningful involvement, as well as volunteer and financial support for the school.

- 6.3 The school has a communication plan in place, which clearly relates the mission, values and needs of the school and inspires loyalty and involvement. The plan fosters and stimulates relationships and is personalized to the different constituents within the school community.
- 6.4 The school communicates effectively, insuring the external audiences (parents, alumni and prospective families) are informed about the school's policies, procedures and decisions.
- 6.5 The school has a culture of philanthropy and optimizes donor engagement.
- 6.6 The school has appropriate infrastructure to support overall advancement and fundraising support services.
- 6.7 The school has mission-appropriate fundraising programs that engage all constituents.
- 6.8 The school interacts constructively with the communities in which it exists; uses community resources appropriately, and participates in and contributes back to these communities.
- 6.9 The school is able to raise significant amounts of money for capital and endowment projects.
- 6.10 The school has a marketing plan that articulates the unique value proposition of the school to prospective families and the broader community.



Enrolment Management

The school has defined those qualities that constitute a “mission appropriate” student and has established policies and procedures for enrolment management that ensure that the school is enrolling mission appropriate students.

- 7.1 The school has defined what constitutes a diverse student body in accordance with the school's mission and its geographic community.
- 7.2 The school has a strategic and proactive enrolment management program.
- 7.3 The school has effective policies and procedures to support the enrolment management program.
- 7.4 The school ensures an appropriate match between a prospective student and family and the mission of the school.
- 7.5 The school operates under a clear set of practices for gathering, reviewing and maintaining prospective student information; while respecting the confidentiality of students, families, and documents in the admission process.
- 7.6 The school's promotional materials accurately describe the school.
- 7.7 Financial responsibilities of the parent/guardian, as well as the financial aid process, are clearly stated in writing and communicated prior to enrolment and re-enrolment.

- 7.8 While families are responsible for the payment of fees, the school, within the constraints of its budget and stage of development, has provisions for offering financial assistance to deserving students.
- 7.9 The school respects and affirms the dignity and worth of each candidate and his/her family.
- 7.10 The school applies the same high standards of integrity whether talking about its own school or other institutions.



Governance

The Board's membership, structure and processes advance the school's mission, vision and long-term viability; and the Board operates in fiduciary, strategic and generative modes.

- 8.1 The Board adopts a clear statement of the school's mission, vision and values, and reviews them periodically.
- 8.2 The Board oversees the development and implementation of the school's strategy and Strategic Plan that is data-driven and consultative. The Board annually reviews the major strategic priorities for the school.
- 8.3 Every Board meeting includes a discussion of strategy and risk.
- 8.4 The Board's size, composition and nominating process ensure the expertise and diversity needed to achieve the mission and strategy of the school, including nonparents on the Board.
- 8.5 The Board reviews and maintains appropriate bylaws that conform to legal requirements, including duty of loyalty, obedience and care.
- 8.6 The Board has a written mandate to identify and endorse all roles and responsibilities of its Board members, committees and task forces.
- 8.7 The Board has processes to train, assess, improve and sustain its effectiveness.
- 8.8 The Board keeps records of its meetings, committees and policies, and communicates its decisions appropriately, while keeping deliberations confidential.
- 8.9 The Board has developed a cooperative and effective working partnership with the Head of School. The performance of the Head of the school is evaluated on an annual basis by the Board through a practised and understood procedure. The results and the basis of the Head's compensation are documented.
- 8.10 The Board ensures the leadership capacity of the school's leadership and Board.
- 8.11 The Board exercises fiduciary responsibility in attempting to assure the long-term viability of the school.
- 8.12 The Board ensures the school has a risk management policy in place with respect to strategic, reputational, operational, financial or legal risks.
- 8.13 The Board devotes time and energy to generative thinking in addition to meeting its strategic and fiduciary responsibilities.

- 8.14 The Board engages in fundraising and has endowment plans and/or funds in place.
- 8.15 If the School has a Foundation, the membership is so constituted as to provide the expertise and commitment required to be effective stewards of its assets.



Finance

The school's financial resources and financial planning are adequate to support the school's mission and to sustain the school's long-term permanence and strength.

- 9.1 The school is incorporated as a non-profit organization or share capital organization, and is audited annually by an independent professional.
- 9.2 The budget, financial resources, and management are capable of sustaining educational and other programs consistent with the school's stated mission and strategy.
- 9.3 The school has a policy and practice of building financial reserves for long-term facilities needs and unforeseen financial obligations.
- 9.4 The school has operating and capital budgeting processes that are approved and monitored by the governing body.
- 9.5 The school has policies and follows practices sufficient for the governing body to meet its fiduciary responsibility with regard to finance and financial risk management including but not limited to quarterly reporting on key performance indicators.
- 9.6 The school combines a solid financial base with effective financial management to ensure its long-term permanence and strength.
- 9.7 The school has a long-range strategic financial plan that is informed by school data and supports the school's future strategy.
- 9.8 The school communicates a high-level annual report to its community and makes Financial Statements available on request.
- 9.9 Financial records, whether digital or paper, are secured against fire or other potential loss.
- 9.10 The school focuses on revenue, including actively researching sources of revenue.



Physical Plant, Health & Safety

The physical plant, grounds and operations of the school support the vision, mission and programs of the school. The school has established and effectively implemented guidelines and procedures that promote a safe and healthy school environment.

- 10.1 The school's overall facilities are suitable to the operations and strategic priorities of the school.
- 10.2 The school's instructional facilities are suitable to support the vision and mission of the school.
- 10.3 The facilities are operated and maintained in compliance with local health and safety regulations, building codes and in a manner designed to safeguard the health, safety, comfort and dignity of students, visitors, contractors, faculty and staff.
- 10.4 The school demonstrates long-range facilities planning that is incorporated into the school's strategic and longrange financial plans. Long-range plans address plant maintenance, improvement or expansion as correlated with projected enrolment, program growth, and/or institutional development and change.
- 10.5 The school's risk management and insurance program is comprehensive and reviewed periodically with respect to risks, liabilities, and obligations.
- 10.6 The school has written emergency response procedures, which have been implemented, practiced, communicated and updated on a regular basis.
- 10.7 The school has written procedures regarding notification, treatment and reporting of injury, illness and suspected child abuse. The procedures are clearly understood by faculty, staff, parents, and students as appropriate.
- 10.8 The school has a business interruption plan.
- 10.9 All written security, health, safety and emergency procedures dealing with health, safety and child protection are reviewed, communicated and updated annually.
- 10.10 The administration is aware of, and ensures that the school is in compliance with, all relevant legal and statutory requirements as it relates to health, safety and child protection.
- 10.11 The school manages its traffic and parking in ways that are controlled, safe and respectful of the surrounding community.
- 10.12 There is appropriate signage on campus so that staff, students and visitors feel welcome and are able to navigate the campus safely and easily.
- 10.13 The school researches and employs practical strategies for addressing educational and risk management issues (including legal and insurance issues) before allowing off-site excursions.
- 10.14 The school ensures that transportation of staff and students is managed in compliance with all legislated requirements.
- 10.15 Facilities and staff for food service are appropriate and the quality of the food served is reasonable, balanced, and appealing to the diverse needs and interests of the Community.
- 10.16 The school has an environmental responsibility plan that is congruent with the school's mission and vision.
- 10.17 Employees understand that the supervision of students to ensure their safety is a priority in all school activities.
- 10.18 The school has a clear definition of child protection with supporting policies and procedures in place to respond promptly and effectively to incidents of child abuse and suspected child abuse within the school or elsewhere.



11

Commitment to School Improvement

The school demonstrates a commitment to continuous whole school improvement.

- 11.1** The school has conducted an Internal Evaluation Report that provides for broad participation of the school community and full disclosure in the examination of strengths and weaknesses.
- 11.2** The school has addressed all recommendations from its previous accreditation visit (only for schools going through re-accreditation).
- 11.3** The school regularly collects and analyses research and school data and uses it to make improvements.
- 11.4** The school engages in ongoing development, review and evaluation of its program, including tracking the level of success of its graduates.
- 11.5** The school is aware of, and continues to search out, new approaches to education, and implements those aligned to the mission of the school.
- 11.6** The school has a structured, ongoing process through which it solicits and analyses the perspectives of staff, students, alumni and parents about their experience with the school, and it uses the information from this process to strengthen the school and improve learning.



12

Boarding

The Boarding program operates in a way that assures an enriched and extended learning experience for all students.

- 12.1** The boarding program has an articulated philosophy and curriculum that meets the needs of boarding students.
- 12.2** The boarding program is integrated into the total life of the school, by shaping culture and extending the academic and co-curricular learning for all students.
- 12.3** The boarding program provides for the individual needs of a diverse population.
- 12.4** The boarding program is carried out in a safe and healthy environment.
- 12.5** Rules and policies governing boarding life, leave, privileges, travel and discipline are published so that both boarding students and their parents are properly informed.
- 12.6** The boarding community thrives in a climate of trust, care, honesty and collaboration that is evident.

- 12.7** The boarding staff are responsive to parents and actively promote the concept of co-parenting (so residential staff get some authority in the partnership).
- 12.8** The boarding staff has the knowledge, skills and qualities to effectively support boarding students.



12b

Homestay

The Homestay program operates in a way that assures an enriched and extended learning experience for all students.

For schools starting the Internal Review Process during the 2019-2020 school year.

- 12.9** The school has an articulated philosophy and program for the homestay students that is aligned with the school's mission and vision.
- 12.10** There is a clearly defined admissions process that addresses whether a student will thrive in the homestay program.
- 12.11** The homestay program and its students are integrated into the life of the school and there is positive and meaningful connection between students, fostered by their shared experiences of school life.
- 12.12** The homestay program provides resources to meet the diverse needs and to support the health and wellness of homestay students.
- 12.13** The homestay program operates in safe and healthy home environments.
- 12.14** There are comprehensive, well-developed homestay policies and processes that are consistently applied and regularly reviewed by the school. These policies are published to ensure students, parents, host families, and other stakeholders are well-informed.
- 12.15** The school ensures positive relationships are established between students, parents, host families, and other stakeholders. These relationships are trusting, caring, honest and collaborative.
- 12.16** The staff are proactive and responsive in their communication to students, parents, host families, and other stakeholders to address the needs of homestay students.
- 12.17** The homestay programs are directed by staff that is knowledgeable and able to support the students.
- 12.18** The program follows provincial guidelines and/or regulations that relate to homestay.