

2018–2023 Strategic Plan

The Independent Schools Foundation



The Independent Schools Foundation Limited
智立教育基金有限公司



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1. Foreword

In its first 15 years, the Independent Schools Foundation (“ISF” or “Foundation”) has established itself as a leader in excellent, innovative bilingual and bicultural Chinese-English education in Hong Kong. We are proud that we have achieved all of the key strategic objectives set out in the previous Strategic Plan (2011-2016), including establishment of the Pre-School, building works, *Shuyuan* program development, staff recruiting, fund raising, IB results, and university placements.

Professor Sir Charles Kao’s legacy as Founding Chairman was to infuse the spirit of innovation and adventure into the school ethos. His enthusiasm for learning by discovery and problem solving is reflected in part of our Mission Statement:

*“...nurturing creativity, critical thinking,
and a lifelong love of learning”*

These are essential qualities for our graduates to succeed in the future, and thus they are an important area of focus in this strategic plan. We intend to give our students a high degree of *STEM + Arts* fluency (Science, Technology, Engineering, and Mathematics + Arts) that will allow them to flourish in an interconnected, interdependent digital world, while having the creative, communicative, collaborative and humanistic skills necessary to excel and lead in any organization.

We have always believed that our students and graduates must follow a core value system, which is the *Eight Virtues + One*. This strategic plan includes programs which will further incorporate these values in the curriculum and in student life. By nurturing a community that embodies its thoughts and actions in the *Eight Virtues + One*, we are developing young people of good heart and character to lead lives of meaning, impact and purpose.

Of course, our strategic plan includes a great deal more, the details of which we invite you to explore in the body of the document. We are excited to share our plans for excellence in bi-lingual education, experiential learning, student well-being and much more.

As part of the strategic planning process, members of the Board and school leadership have travelled together to visit multiple schools in London, Silicon Valley, Shanghai and Singapore. These schools are all excellent in one or more aspects of curriculum, student life, or administration, and they offer a diverse perspective on education. We have also talked to universities and faculty at various schools of education. These learning experiences – together with input from parents, students, faculty and staff – provide the framework for creating this new strategic plan in the context of ISF and our children’s future.

The commitment of our Board and leadership to delivering our Vision and Mission has positioned us well to offer the best independent education in Hong Kong, and the finest bilingual Chinese-English curriculum in the world. Our timeless values and ethos of innovation will ensure that ISF will be able to endure as a relevant, flourishing and purposeful institution in a world that is constantly changing. Thank you for joining us in this journey.



2. Strategic Plan 2011-2016: A Review

The first ISF Academy Strategic Plan was drafted during 2010 and following a period of public consultation, it was published in 2011. The first plan was drafted at a time when the additional floors of R Block (5th and 6th floors) had only just been completed (July, 2010), and G Block was still under construction.

At the time of its launch, the plan set out an ambitious program of capital works, academic program development, fundraising, staff recruiting, college placements for graduates, and international accreditation. Of the major projects announced in the first strategic plan, only one aspiration – the establishment of an Experiential Base – was not achieved, although the associated experiential learning programs have expanded enormously since 2011. Substantial progress was made in all areas of The ISF Academy, later including The ISF Pre-School, and now The Foundation operations.

The key operational achievements and milestones from the first strategic plan include:

a. Access and Enrolment:

- Enrolment: **1,080 by 2012, 1440 by 2014**
- Early Learning Centre: **(The ISF Pre-School) established in 2014**
- Secondary Annex: **construction started in 2012**
- Financial Aid & Scholarships: **launched, including 21 College scholarships**

b. Enhancing Learning:

- CIS/WASC Accreditation: **May 2014 (CIS International Certification in 2017)**
- The ISF *Shuyuan*: **established March 2011**
- Parent Education: **launched in 2015 (PTA Speaker Series)**
- Bilingual Curriculum: **Chinese early literacy program launched in 2014**
- Diploma: **first graduates in 2012, 192 graduates over seven graduating cohorts**
- Notebook program: **100% Secondary School students have a notebook**

c. Developing a Learning Community:

- Professional Development: **83 teachers supported in post-graduate study**
- Bilingual Development of Staff: **launched (PD and language classes)**
- Hong Kong Government Service Agreement: **renewed in February 2015**
- **Staff retention above 90%**

d. Building School Systems:

- Swimming Pool: **constructed in 2018**
- Multipurpose Auditorium: **constructed in 2018**
- The *Shuyuan* Center for Science and Civilization (Annex): **constructed in 2012**
- Aspire Campaign: **concluded in 2017**

Following such a successful strategic plan is not an easy or straightforward task. Many of the core tasks, such as accreditation, IB program authorization, and capital construction, once complete, are no longer strategic priorities. The programs and facilities associated with these institutional milestones, however, do require constant effort, improvement, review, and renewal. Most importantly, it must be emphasized in this new strategic plan that **ALL** of the initiatives, programs, facilities, functions, benchmark performance indicators, and institutional or educational aspirations contained in the first plan remain relevant, operative and foremost in our thinking and daily work as we enter the second plan. These are not 'completed' tasks that are set aside; they are living miniature mission statements that continue to resonate and drive planning, action, and review.

A further evolutionary change is that the first strategic plan had as its focus one entity – The ISF Academy. The new strategic plan has been developed from the perspective of the School Sponsoring Body (SSB), The Independent Schools Foundation. It sets the vision, mission, and values of all members of the ISF 'group', which includes The ISF Academy, The ISF Pre-School, and other entities being established that are explained in more detail in the following sections. Each of these entities has produced an action plan to implement the relevant sections of the plan, with appropriate performance indicators.





2018-2023 STRATEGIC PLAN

We offer the best independent education in
Hong Kong and the finest Chinese-English
bilingual curriculum in the world

3. The Strategic Plan 2018–2023

The Independent Schools Foundation approach to learning emphasizes independent thinking, strong Chinese moral values, full literacy in both Chinese and English, and a deeply bicultural global perspective on life. In constructing an education that strikes an ideal balance between Chinese and Western thinking, values, philosophies, and understandings, the ISF (including The ISF Academy and The ISF Pre-School) seeks to educate students for life, physical, intellectual, and spiritual, in the 21st century. ISF learners are intellectually curious, problem solvers, lateral thinkers and emergent leaders who thrive amidst complexity, uncertainty, and change. An ISF education inculcates creativity, encourages innovation, develops flexibility, demands discipline, reinforces resilience, and tests commitment; it also fosters a deep appreciation for Chinese culture and language.

The Strategic Plan 2018–2023 is the blueprint for guiding the development of the ISF over the next five years. It is informed by the overarching ISF guiding statements: its Vision, Mission, and Values (see Appendix 1 **The ISF Academy: A Short History and Guiding Statements**). These guiding statements are the embodiment of the ISF ethos; they form a working, institutional ‘constitution’ that sets the philosophical and operational parameters for the Strategic Plan and the supporting action plans.

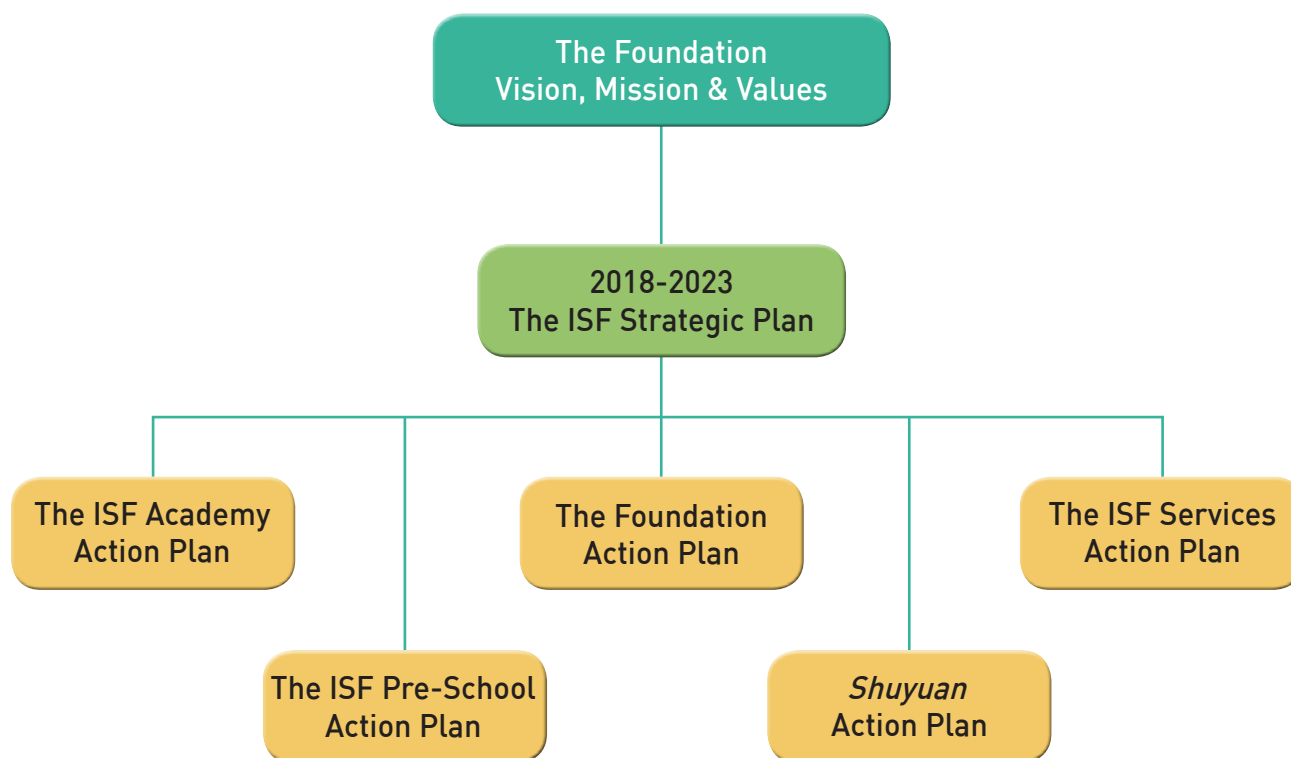


Figure 1: Strategic Planning Structure

The 2018-2023 Strategic Plan sets the overall direction of strategic development for the ISF over the five years of the Plan. Within the plan, there are four key strategic directions (see Key Strategic Directions), each of which features a set of strategic goals for the planning period. The plan also sets targets or goals for the ISF, some of which have been determined by external bodies, such as the enrolment targets set by the Hong Kong Government.

It is a core aspiration in this plan for ISF to offer the best independent education in Hong Kong and the finest Chinese-English bilingual curriculum in the world.

The current institutional structure is illustrated in figure 2. It includes the ISF Foundation (School Sponsoring Body or SSB), The ISF Academy, The ISF Pre-School, and two new entities that will be formed during the life of the next strategic plan: The ISF Services Company, and *Shuyuan*. Elements of experiential learning and the co-curricular program will be managed under ISF Services. The *Shuyuan* entity will manage and operate STEM programs such as the Makerspace, in collaboration with Columbia University and Fablearn, coding programs, and other inter-institutional collaborative scientific research programs.

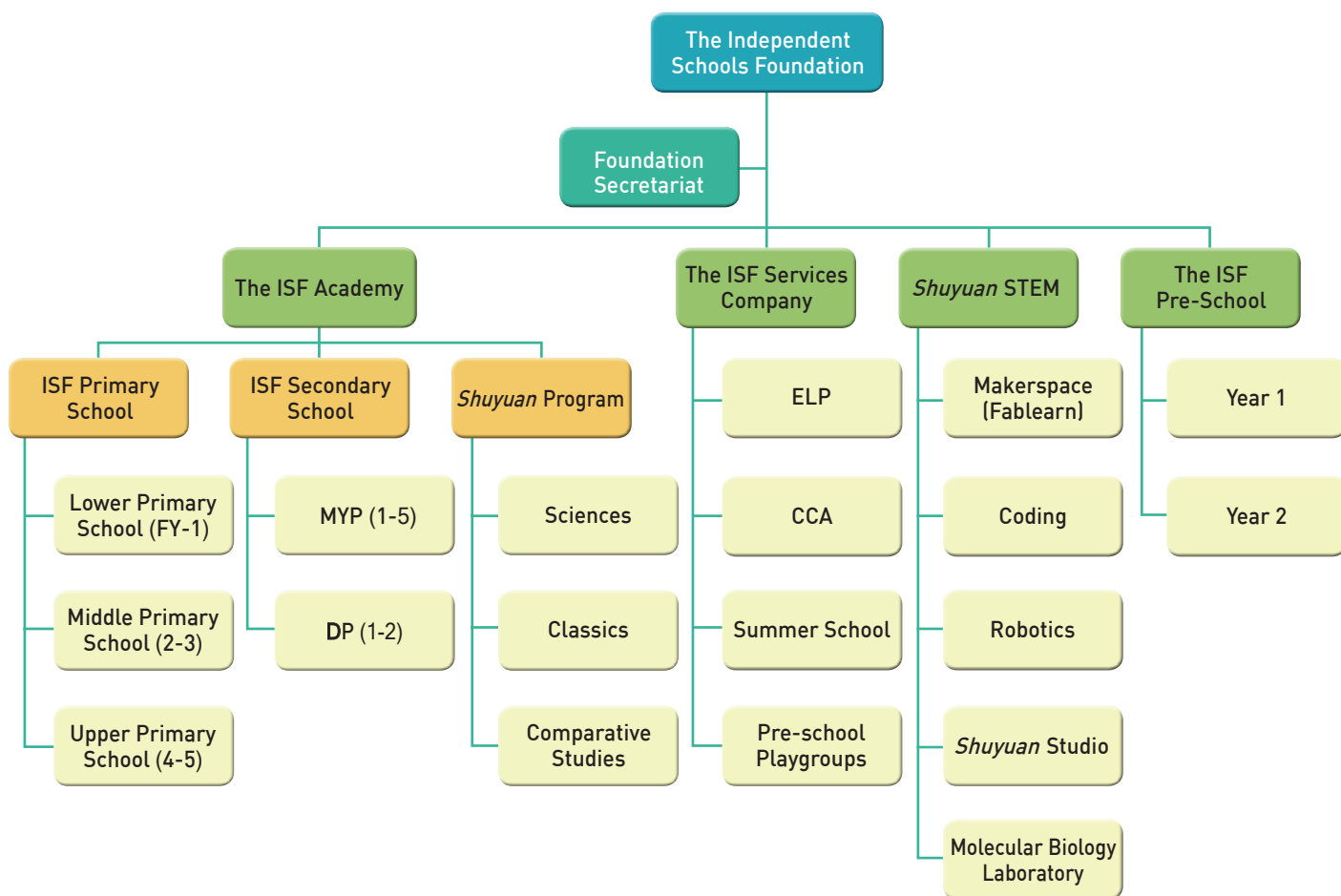


Figure 2: Institutional Organization Chart

4. Key Stakeholders

The ISF exists to serve the needs of its stakeholders and to draw on each stakeholder group to support the mission of the institution. In formulating the 2018-2023 strategic plan, the following key stakeholder groups are formally recognized and have participated in or been consulted during the planning process during the planning period. Each key stakeholder is considered to be operationally vital to the continued viability and success of The Foundation, The ISF Academy, and The ISF Pre-School. The expectations, needs, and contributory capacities of the nine key stakeholder groups are seen as the core elements of the ISF's vision, mission, and values.

The nine key stakeholders are:

a. Students

all ISF students, both present and future; for past students, see *Alumni*;

b. Parents

all parents of ISF students, past, present, and future, including the Parent Teacher Association;

c. The Foundation and governing bodies

The Foundation, governing boards, and advisory committees of ISF companies;

d. Management, faculty, and staff

employees of all three companies;

e. Alumni

past students who are members or associate members of the Alumni Association;

f. Hong Kong Government

regulator of The ISF Academy and The ISF Pre-School through EDB;

g. Key Suppliers

services, utilities, resources, curriculum, authorization, accreditation, banks, etc.;

h. Tertiary Education Institutions

education providers post-graduation; and

i. The Hong Kong Community

the citizens and residents of Hong Kong.

Each of these key stakeholders has a discrete and specific set of expectations that are placed on the schools; each group has the capacity to contribute to the ISF in ways that benefit the schools and contribute towards the strategic development of the ISF. These expectations are represented in summary form in the following figure:

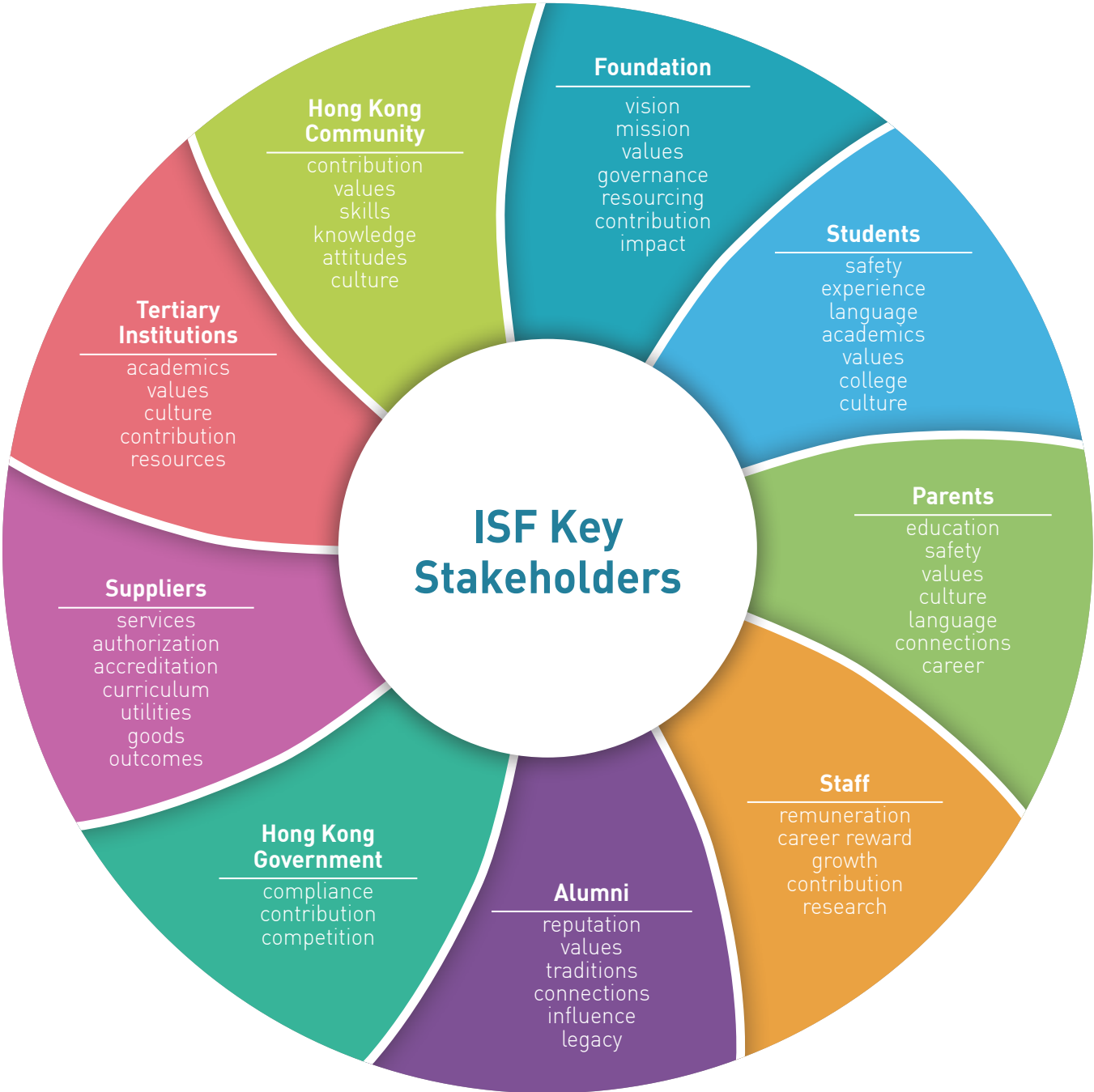


Figure 3: ISF Key Stakeholders

This strategic plan acknowledges these stakeholder expectations as a starting point for setting broad directions for the future development of an ISF education. The developmental targets outlined in this plan have been structured around these key stakeholders and their needs and expectations.



STRATEGIC DIRECTIONS

Four essential directions of strategic development – Learning, Leadership, Infrastructure and Support

5. Key Strategic Directions

The ISF strategic plan developed from a detailed analysis of key stakeholder needs and expectations consists of four essential directions for strategic development:

- Learning:** promotes learning as a process of developmental change to generate growth in ISF learners that is physical, emotional, intellectual and spiritual; sets the direction and purpose of ISF learning in a Chinese linguistic and cultural context; prepares ISF learners for success in life through an intelligently planned, technologically literate, sequenced curriculum that builds independent problem-solvers, innovators, thinkers, and creators, who demonstrate strong moral character, truthfulness, and deep practical wisdom; forearms learners with the courage, resilience, and character to overcome adversity and recover from disappointment;
- Leadership:** focuses on leaders of learning who create the institutional ethos, learning culture, and physical setting in which learning takes place through professionalism, commitment to high standards, and engagement with learners; recruits and retains teachers and leaders who exemplify and embody the values of ISF through teaching, research, innovation, commitment, and service to others; fosters leadership through strong governance; takes measured risks to advance learning;

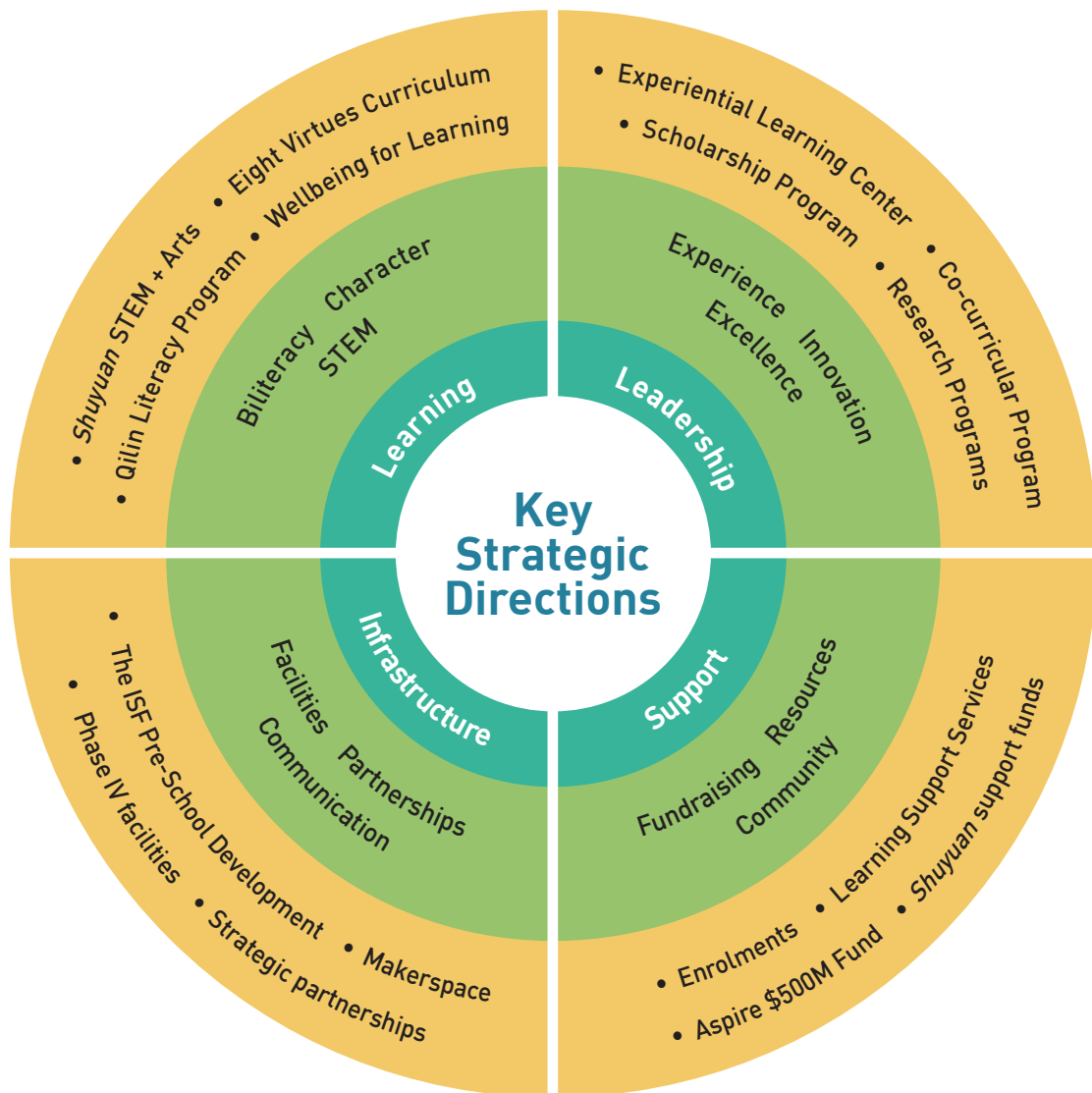


Figure 4: Essential Developmental Directions

- c. **Infrastructure:** builds the physical and social infrastructure of the school; provides the physical, cultural, academic, and pastoral environments and structures in which learning takes place; extends the network of systems, contacts, exchanges, partnerships, to create a rich and varied canvas for learning and innovation; connects the ISF community of families and other engaged stakeholders; and
- d. **Support:** provides support systems and resources to facilitate all learning programs for students, staff, parents, and the ISF community; manages resources prudently and efficiently to fulfil the ISF mission; supports the ISF mission through fundraising; enables educational innovation beyond traditional models of schools and schooling.

Within each essential direction, there is at least one major initiative that reflects the areas in which the ISF schools intends to invest resources, time, and effort over the lifespan of the plan to achieve the overall vision and mission of the schools.





STRATEGIC PROJECTS

Supporting the four strategic development directions, major strategic projects further enhance learning, core values and students' wellbeing

6. Major Strategic Projects: 2018-2023

For each of the four essential directions for strategic development, at least one major project has been planned, to be undertaken and completed by the ISF organization over the coming five years. Some of these projects, such as the *Shuyuan* STEM + Arts project, will build on existing foundations. Others, such as the *Wellbeing for Learning Project*, are new initiatives. Accordingly, ISF is committed to undertake the following projects by 2023:

6.1. Student Wellbeing for Learning Project (Learning/Support)

Building on the foundation of The ISF Academy's core values, the *Eight Virtues + One*, the *Wellbeing for Learning Project* seeks to foster holistic development of the complete learner, intellectually, emotionally, physically, and spiritually. The *Wellbeing for Learning Project* extends existing ISF CCA offerings through the establishment of a suite of student-focused programs that develop learner wellbeing and resilience through activities that engage mind, body, and spirit. These learner activities are intended to nourish competitive spirit and sportsmanship through professional training and physical/emotional challenges.

The *Wellbeing for Learning Project* includes school-based, local, and overseas training programs and leadership courses to develop character traits that boost self-confidence and elevate resilience in the face of challenges. Individualized offerings cater to student interests and develop potential in sports, games, and cultural activities by providing professional coaching and support staff. Invited speakers inspire students to greater levels of participation and commitment.



6.2. The ISF *Shuyuan* & *Shuyuan* STEM + Arts (Learning/Leadership)

The ISF Academy *Shuyuan* is based on the classical Chinese learning sanctuary and the Platonic Academy; the goal of which is independent study and enquiry under the guidance of a master. Set in the 21st century, the courses that the *Shuyuan* program offers aim to promote deep and thoughtful scholarship in a multidisciplinary environment, allowing selected students to pursue challenging branches of knowledge beyond the regularly-taught curriculum. These courses require long-term dedication, as the skills being developed are cumulative and form the foundation for rigorous, lifelong learning. *Shuyuan* is founded on the principles of rigorous scholarship, solid academic study, challenging research opportunities, intellectual curiosity and practical wisdom. The academic journal *Bauhinia*, published annually, was founded to disseminate the best *Shuyuan* research from the previous year.

The goal of the ISF *Shuyuan* in this strategic plan is to extend and broaden the range of *Shuyuan* course offerings in both the Primary School and the Secondary School beyond the current offerings, particularly in the fields of science, technology, engineering, mathematics. This includes the development of the courses and research projects that build on the existing *Shuyuan* courses, but which explore new opportunities. It also includes teacher training, teacher-led research, and the development of a distinct, unique ISF *Shuyuan* curriculum framework. Leadership of *Shuyuan* is to be further enhanced; a review board to evaluate and endorse *Shuyuan* experimental projects is also to be established.

As a part of the development of The ISF Academy *Shuyuan* curriculum, the ISF is founding a discrete corporate entity – ***Shuyuan*** – to plan, develop, and implement a suite of courses under the *Shuyuan* STEM + Arts Program. STEM education, especially taught in a Chinese language and bi-lingual setting, is to form one focus of the *Shuyuan* Program, integrating the teaching of STEM subjects (science, technology, engineering, and mathematics) in collaborative, project-based courses aimed at students from pre-school to college age.

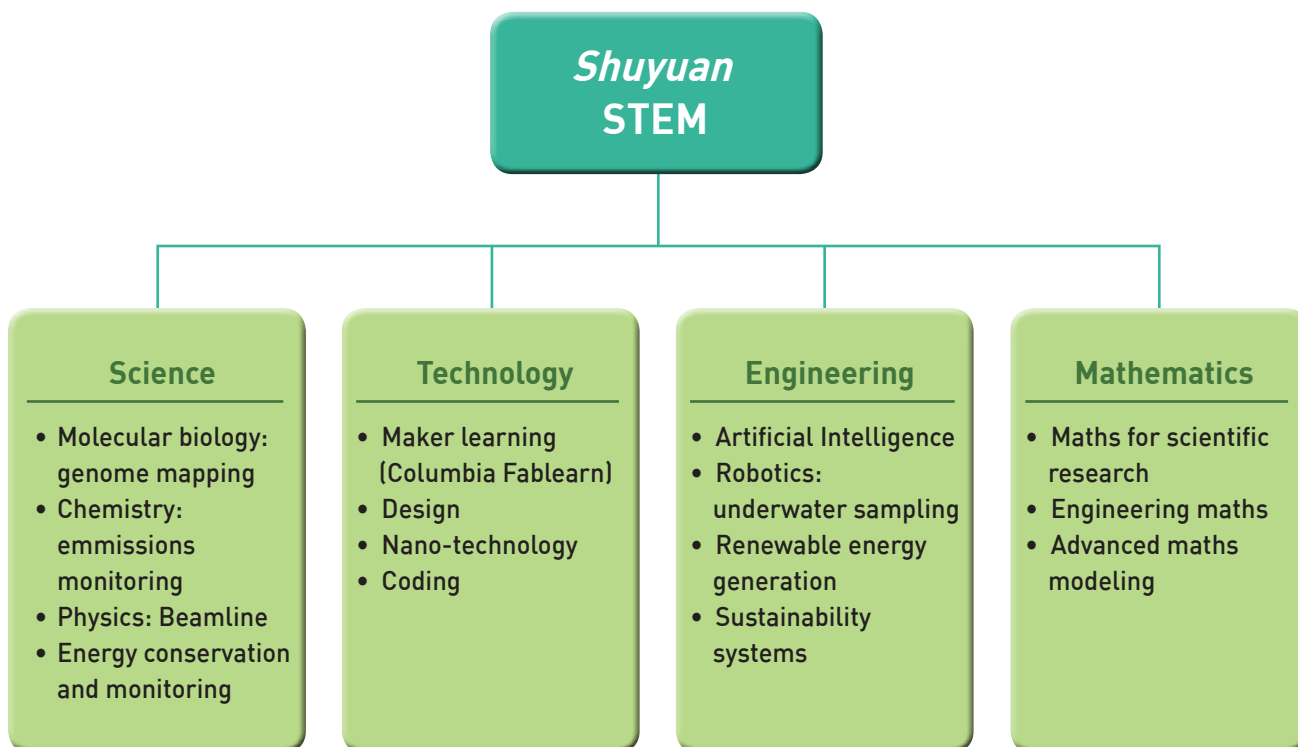


Figure 5: *Shuyuan* STEM

To STEM, *Shuyuan* adds a creative dimension (Arts) through **Shuyuan Studio** which specializes in the innovative and creative application of STEM skills and knowledge to solve problems and construct artefacts. *Shuyuan* is to act as a not-for-profit hub specializing in STEM + Arts education and research, based in purpose-built facilities at ISF that draw heavily on the principles and practices of inquiry-based, high-quality STEM education, incorporating the most recent technologies and related innovations in each of the STEM fields. Educational outcomes are highly aspirational and evaluated on best international practices in each STEM field. The Program hosts research into fields relevant to STEM + Arts education; it also offers a range of internationally accredited and government-approved courses with a strong STEM focus to students from ISF and other institutions of learning, in Hong Kong and abroad. The Program also seeks to work with educational APP developers, STEM education researchers and local schools in developing effective STEM education programs.



The ISF STEM + Arts 'universe' is mapped in the following figure:

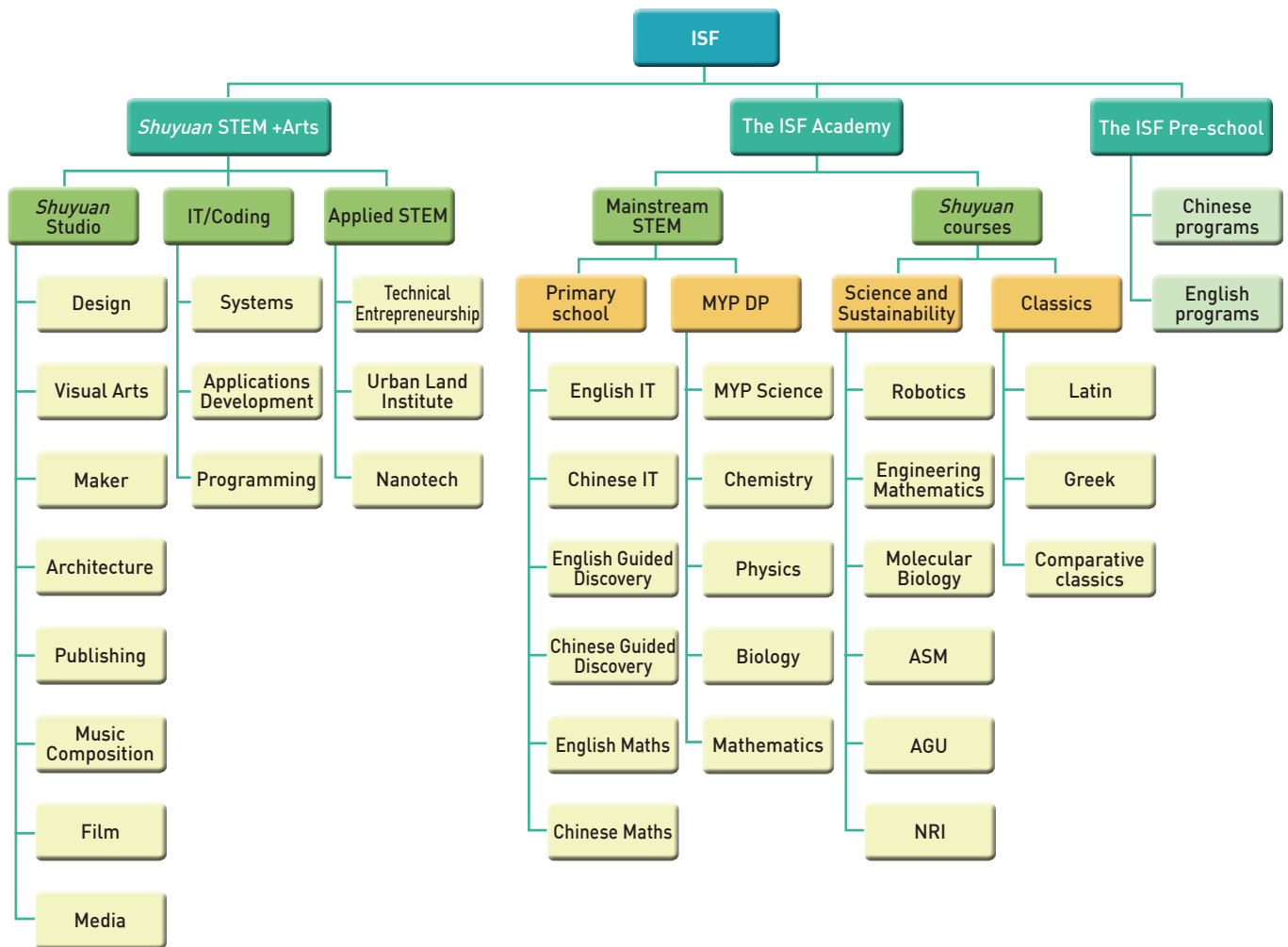


Figure 6: ISF STEM + Arts Organization Chart

The next phase of *Shuyuan* STEM + Arts development includes the following programs:

- Technical Entrepreneurship (TE):** acquiring an understanding of the process by which commercially viable products and services can be developed from laboratory research; includes patent application processes, innovation financing, developing a 'pitch' to potential collaborators and funding bodies);
- Mathematics for Scientific Research** (includes exposure to advanced mathematical modelling tools and approaches);
- Electronics and Maker Workshop:** mastery of maker skills, including tool use and fabrication techniques, and skills needed to design, manufacture, test, and develop a range of mechanical, electrical, and electronic devices;
- Energy Conservation** (power generation and energy consumption monitoring);
- Molecular Biology (MB):** supervised molecular biology research and experimentation undertaken in the MB laboratory (including initiation of new genome research; publication of MBL research findings, preparation of posters and papers for international conferences such as AGU and ASM);
- Nanotechnology:** experimentation in a laboratory (an interdisciplinary project that includes research into nanotechnology and the manufacture of associated artefacts, such as nanowire); and
- Shuyuan Studio:** Applied Creativity explored through the *Shuyuan* Studio; includes collaboration in project-based learning, harnessing creativity to design and build artefacts that embody the spirit of *Shuyuan* (research, design, development, creation, innovation, experimentation, collaboration, and risk-taking); potential additions include publishing, music composition, film-making, architecture, virtual modelling, virtual reality, game design, and digital art.

6.3. The ISF *Eight Virtues + One* Curriculum Project (Learning/Leadership)

The ISF Academy Primary School is to develop and implement a unique, student-centred, inquiry-based bilingual curriculum incorporating the ISF *Eight Virtues + One* as the conceptual framework in which to explore and develop the key learnings, skills, experiences, and attitudes appropriate to ISF primary-aged children. The approach to be adopted is holistic and strongly grounded in Chinese values and ways of viewing the world, as expressed through the *Eight Virtues + One*. For ISF learners, the *Eight Virtues + One* Curriculum will also create a seamless transition into the Secondary School.

[note: the Four Thoughts and Eight Virtues date from the Spring and Autumn period (春秋時代 770BC-476BC). Guan Zhong (管仲) codified the four social bonds 禮、義、廉、耻 as propriety, justice, integrity, and honor: source: <https://zh.wikipedia.org/wiki/四維八德>. The Eight Virtues have been a consistent canon of virtue through Chinese history and were also invoked by Dr. Sun Yat-sen in the Three Principles of Democracy: Sun Yat-sen, Sixth Lecture, 2 March 1924 National Morale and World tranquillity, source: https://sunyatsenfoundation.org/wpcore/wp-content/uploads/San-Min-Chu-I_FINAL-3-Principles.pdf, pp.45-50].

6.4. The ISF Experiential Learning Center (Leadership/Infrastructure)

Experiential learning is embedded in the ISF Mission Statement. The ISF is seeking to establish a dedicated, remote, residential center for experiential learning programs. Experiential learning conducted away from home and school confers unique learning benefits for participants. The Center is to offer secure, all-weather accommodation to small numbers of students (class size) in a location that offers access to sites of environmental and scientific interest, while also offering physical, cultural, and emotional challenges to program participants. Locations within the Hong Kong SAR and beyond are under evaluation.



6.5. Xiao Qilin Accelerated Chinese Literacy Program (Learning/Leadership)

Uniquely combining character memorisation with synthetic phonics and undertaken at a self-managed pace, the Xiao Qilin Accelerated Chinese Literacy Program has been in use for five years at The ISF Academy. Building on the existing, highly successful program aimed at lower primary-aged students, the next phase of development of the Xiao Qilin Program sees the introduction of the following elements:

- a. Xiao Qilin 2.0: introducing a richer range of reading resources and learning activities for middle, upper primary-aged students that will be incorporated into the next iteration of the Xiao Qilin App;
- b. Zhong Qilin Chinese Humanities 3.0: the development and piloting of a set of electronically mediated materials with a Chinese Humanities focus aimed at Language Acquisition students in Middle School; these materials will be developed by The ISF Academy *Shuyuan* Research Center and will be structured thematically; and designed to improve Chinese text composition skills.

6.6. The ISF Pre-School Development Project (Infrastructure/Support)

Founded in 2014, The ISF Pre-School has had a very successful launch at its current Sheung Wan site. Site constraints, however, necessitate the acquisition of additional space for Pre-School learning programs to extend to a larger number of students across two year levels. The ISF Pre-School Development Project has the following aims:

- a. Expansion of teaching and learning space available to The ISF Pre-School classes; and
- b. Greater security of tenure for The ISF Pre-School campus.

The ISF Pre-School Development Project seeks to secure the long-term future of The ISF Pre-School at an expanded site located closer to The ISF Academy's base in Pokfulam.



6.7. The Inspire Fundraising Campaign (Support/Infrastructure)

The Inspire Fundraising Campaign aims to raise HK\$500 million over the five-year life of the strategic plan (2018-23) to fund capital construction projects, to sustain and develop the ISF *Shuyuan* Curriculum, to found and implement the *Shuyuan* STEM Program, to establish the ISF Experiential Learning Center, and undertake other Foundation-sponsored educational initiatives.

6.8. Other Strategic Projects: Phase IV

In addition to the seven major projects identified above, the Foundation, The ISF Academy, and The ISF Pre-School continue to explore avenues for the expansion or enhancement of current capacity and capabilities in alignment with the vision, mission, and values of the ISF. The further development of facilities at the Kong Sin Wan Campus site or elsewhere has been designated 'Phase IV'.



7. Major Performance Metrics for 2018-2023

In addition to the eight major projects described in Section 6, which are to be undertaken during the five-year plan, there are also **five** domains of performance across all ISF entities that are essential elements of the ISF mission. These performance benchmarks are set by The Foundation or external stakeholders, particularly the Hong Kong Government. These performance metrics are monitored and managed by different divisions with ISF: academic and student related performance indicators are managed by the two schools.

7.1. Performance Domains

The five performance domains and key indicators of performance are as follows:

a. Enrolments

- i. The service agreement with the Hong Kong Government specifies an enrolment minimum target of 1,800 students for The ISF Academy;
- ii. The target for the enrolment retention of students at The ISF Academy is 93%;
- iii. The ISF Pre-School has an enrolment target of 320;
- iv. IB Diploma graduating class of 100;

b. Financials

- i. All divisions of the school are expected to break-even after depreciation;
- ii. Financial aid of 10% of tuition set aside to assist students in need;
- iii. Reliance on The Foundation to be progressively reduced;
- iv. Inspire funding target reached (HK\$500 million);

c. Academics (The ISF Academy & The ISF Pre-School)

- i. All academic benchmark data to be collected, analysed, and reported by each school (ACER-ISA, STAR, SMART, CEM, HAST, SAT, ACT, PSAT);
- ii. IB Diploma and Middle Years Certificate outcomes (100% pass rate for both)
- iii. One third of college offers to come from institutions ranked among the world's top universities (Appendix 2);
- iv. 90% of graduates receive an offer from their first choice institution;

d. Students

- i. Balanced socio-economic status of the student body maintained through scholarships and financial aid (10% target);
- ii. Participation in ELPs and CCAs (100% annually);
- iii. *Shuyuan* course participation (100% to have completed at least one *Shuyuan* course by graduation);
- iv. Participation in the *Wellbeing for Learning* programs and activities (100%);

e. Teachers and Staff

- i. Talent acquisition (faculty with post-graduate degrees >66%);
- ii. Talent retention each academic year (>90%);
- iii. Teachers as learners (examiners, workshop leaders, accreditors) and researchers (10% undertaking post-graduate studies); and
- iv. Teachers as Master Teachers (10%).

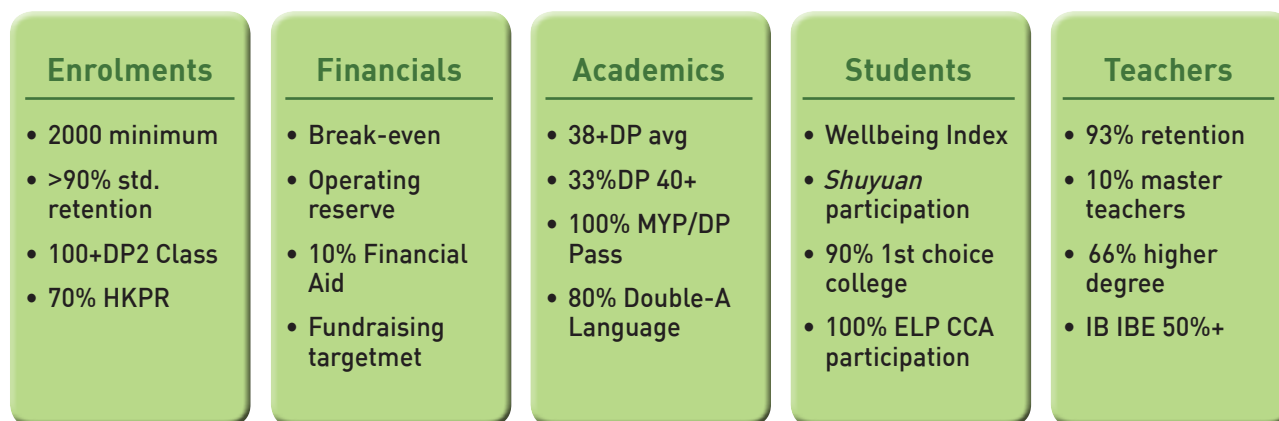


Figure 7: ISF Performance Indicators at a glance

7.2. Performance Indicators: Definitions

Performance Indicators	Definition
# enrolments	the total number of students enrolled in both The ISF Academy and The ISF Pre-School
# transition	The number of students transitioning between ISF schools
% enrolment retention Pre-School	Percentage of student enrolments retained each year at The ISF Pre-School
% enrolment retention Academy	Percentage of student enrolments retained each year at The ISF Academy
\$ budget	Total operational budget for the Financial Year
\$ budget outcome	The total surplus or deficit in a Financial Year
% budget growth	Percentage growth in the operating budget year on year
% fee increase	Percentage increase in tuition fees year on year
\$ reserves	Total accumulated operating and capital reserves
\$ Financial Aid	Total amount paid in financial aid to students in a Financial Year
% Financial Aid Actual vs Budget	Percentage difference between budgeted Financial Aid and actual expenditure
% retention teachers	Percentage of teaching faculty retained each year
\$ donation income	Total amount of donations received in a Financial Year
\$ investment income	Total income generated by funds invested by the Foundation or its companies
\$ <i>Shuyuan</i> expenditure	Total funds expended by the Foundation supporting The ISF Academy <i>Shuyuan</i> program
# <i>Shuyuan</i> programs	Total number of <i>Shuyuan</i> programs offered to ISF students in an Academic Year
% <i>Shuyuan</i> participation	Percentage of eligible student body participating in a <i>Shuyuan</i> course

Figure 8: Performance Indicators

8. Detailed Key Performance Indicators & Targets

8.1. Learning

Strategic Parameter	Performance Indicator	Target
EDB enrolment target	Number of students	Minimum 1,800 Academy students
The ISF Pre-School enrolment targets	Number of students	320 minimum enrolment
Bilingualism	Percentage of students learning at Language 'A' or Language and Literature standard for both Chinese and English	80% at Grade 10 75% at Grade 6
Shuyuan STEM	STEM facilities	Establish a <i>Shuyuan</i> center for STEM education with multilateral partnerships for teaching and research
	# STEM <i>Shuyuan</i> programs	At least one <i>Shuyuan</i> STEM course for Science, Technology, Engineering, and Mathematics per term, semester, or trimester
Shuyuan Studio	# <i>Shuyuan</i> Studio courses	1 each of Architecture, Music Composition, Film-making, Publishing, maker education, Visual Arts/Digital Arts, <i>Shuyuan</i> Design
	# <i>Shuyuan</i> Studio participants	>minimum enrolment for each course
Scholarships	# academic scholarship holders	>2 per grade level (secondary)
	# special talent scholarship holders	>1 per grade level (secondary)

8.2. Leadership

Governance: membership, PD, meetings, committee structures, corporate oversight	Nominations Committee	Establish a nominations committee to sustain board and committee membership
	Governance Professional Development	All members of company boards undergo annual professional development in corporate governance All members of board participate in an annual appraisal of governance performance
	Governance performance appraisal	
Research: support inquiry culture, publications, presentations	# research projects completed	>1 per division published each academic year
	# research articles published	>3 published each year
	# conference presentations undertaken	>5 papers presented each year
Professional Development: learning and growth about teaching	Attendance at PD activities	100% annual participation by teachers in at least one external professional development activity
Master Teaching Program: coaching, mentoring, leading, consulting	Number of Master Teachers	>10% of teachers
Teaching: Action Research; classroom innovation	Research projects Presentations Conference Papers	At least 10% of faculty undertaking research degrees involving teaching and learning practice

STEM Teaching	Recruiting Retention Professional Development <i>Shuyuan</i> STEM Courses	Recruit and retain STEM teachers with post-graduate qualifications to develop and lead mainstream and <i>Shuyuan</i> STEM courses
STEM Leadership	Public standing of ISF # Publications # Conference papers # External consultation	ISF STEM education recognized as the leader in Hong Kong ISF STEM publications carried internationally in each discipline annually ISF STEM conferences – ISF to host annually
Curriculum materials: Xiao Qilin and Zhong Qilin	Publications and apps	Qilin 2.0 published by 2019-20 Qilin 2.0 app launched by 2019-20 Zhong Qilin 1.0 by 2019-20 Zhong Qilin 3.0 by 2023

8.3. Infrastructure

International Partnerships	IB: Authorization	Maintain IB authorization for MYP and DP Undertake regular evaluations
	ACMIBS	Retain ACMIBS membership
	CIS	Retain CIS accreditation
	WASC	Retain WASC accreditation
	ACAMIS	Retain ACAMIS membership
	Round Square	Explore Round Square membership
Experiential Learning	Experiential Learning Center	Establish first phase of experiential learning base by 2021
Hong Kong Government: compliance with ordinances, accountable, transparent	Compliance	Remain 100% compliant with all relevant ordinances
Service Agreement: compliance with KPIs	Enrolment targets	1,800 minimum number of enrolments at Academy
	Accreditation targets	ISF remains internationally accredited (CIS and WASC)
	Curricular targets	ISF remains authorized to offer a non-local curriculum (IB)
	Community relations	ISF maintains positive community relations in Pokfulam through community liaison and traffic management (Service Agreement)
Education Bureau: engagement, dialogue, cooperation	Education Ordinance (CAP 279)	100% compliant with Education Ordinance (CAP 279) and associated regulations
Alumni: facilitate establishment, forum for alumni voice, engagement	Alumni network and events	Annual alumni association events in each of the major destinations for tertiary study in the following countries: <ul style="list-style-type: none"> • United States • United Kingdom • Canada • China – Hong Kong SAR
	Alumni membership	100% of each graduating class joins the Alumni Association annually
	Establishing a formal body to represent ISF alumni	Alumni Association registered as an independent company by 2023
	Alumni contribution to ISF governance	Alumni represented in SMC and/or Foundation Board or Committee by 2023

8.4. Support

The Foundation	Fundraising for ISF development	>\$500 million by 2023
Communications	Communicating Vision, Mission, and Values to ISF community and Hong Kong community	ISF community acceptance and support for mission and values (survey)
Resourcing	Resourcing of operational divisions	100% of annual operating budget
	Staff/faculty salaries and benefits as proportion of budget	70%-80% of tuition fee income
	Revenue generation from Phase 3B facilities	>\$2 million
	Faculty/student ratio	<1:9
Finance and Procurement	Budget prediction	+/- 5% of budget surplus/deficit
	Financial outcome	Break-even
	Cost center management and budget management	All cost centers budgets and progress YTD communicated online to budget holders
Human Resource Management	Staff retention	>93% year on year for faculty >88% for non-teaching staff
	Staff recruiting	<5% incomplete appointments >95% satisfactory rating from all new teachers and staff
	Performance management	<1% per year
	Salaries	In top quartile of independent/international school market in Hong Kong
Facilities Management	Compliance with relevant ordinances and regulations	100% compliance
	Health and Safety	Complete a comprehensive Health and Safety Manual 100% compliance with Health & Safety standards
	ISF facilities	>90% satisfactory rating from all users



9. Enterprise Risk Management Priorities

An essential component of this development plan is the evaluation and management of associated risk. Risk management is facilitated by the ISF Enterprise Risk Management System (ERMS). The following have been identified as the key institutional risks over the life of the plan:

Risk	Risk Quadrant	Rating	Strategy
1. University placements	External Changing	High	<ul style="list-style-type: none"> Investment in additional college counseling assets with US and UK expertise <i>Shuyuan</i> program to boost applicant competitiveness Additional resources and emphasis on written English and preparation for college entry assessments and interviews Small classes in DP Teacher quality enhanced through recruitment, training, appraisal, and talent retention Visitation by senior leaders to build relationships between ISF and targeted colleges (see Appendix 1) Establish partnerships and collaborative relationships with identified key universities (see Appendix 2) Professional development for faculty to support tertiary admissions through effective letters of recommendation
2. Bilingual language standards	Internal Changing	High	<ul style="list-style-type: none"> Xiao Qilin (accelerated literacy in Primary School) Zhong Qilin (Chinese literacy in Secondary School) Benchmark testing in English and Chinese (STAR, SMART, ACER) Recruitment and retention of language acquisition experts Optimized curricular time allocation to develop bilingualism sequentially Prioritization of bilingual learning
3. Recruitment and retention of faculty and staff	Internal Stable	High/Medium	<ul style="list-style-type: none"> Remuneration competitive Recruitment activities at targeted job fairs Referral bonuses for referring faculty except Leadership Group Positive work culture Reward long service Professional Development Funding for Research degrees External opportunities to participate as CIS/WASC accreditors, IB evaluators, IB authorization, IB examiners, and IBEN workshop leaders
4. Compliance with administrative policies and procedures	Internal Stable	Medium	<ul style="list-style-type: none"> Maintain current, relevant and robust policies covering all aspects of school administration Respect for core values: <i>Eight Virtues + One</i> Regular review of policies and their implementation Strong management oversight in all facets of school operations Culture of compliance in operations Expectations shared and monitored by management Professional development for administrators Strong response to any breach Regular appraisals to evaluate performance Enhance on-line handling of administrative processes

5. Student and staff safety and wellbeing	External Stable	High	<ul style="list-style-type: none"> Wellbeing and safety focus in all policies and programs Acceptance of 'balance' as a key element of ISF culture House structure to create positive culture of trust within classes and tutor groups Peer sharing and leadership to support and alert Experiential learning to focus on character and wellbeing Shared responsibility for common wellbeing LST resources to support learners Student voice heard and acted upon
6. Sustaining a healthy physical and emotional culture	Internal Stable	High	<ul style="list-style-type: none"> Wellbeing activities promoted throughout school Homework moderation LST support through counseling and pre-emptive sessions Mindfulness training for teachers Mindfulness practices for students Assessment calendar to spread assessment pressure Substance abuse education and counseling
7. Integrity in school operations	Internal Stable	High	<ul style="list-style-type: none"> <i>Eight Virtues</i> promoted and practiced at all levels of governance and operations Strong, relevant, comprehensive, and current policy and procedures framework Strong Internal Audit function Corruption-free admissions process
8. Compliance with all government ordinances and regulations	External Stable	High	<ul style="list-style-type: none"> Constant monitoring of government policy requirements, updates, trends, and debates Strong Internal Audit function to check compliance Culture of compliance in operations Staff retention to sustain institutional knowledge Targeted recruitment to ensure knowledge of ordinances and regulations is prioritized in new appointees
9. Information and cyber security	External Changing	High	<ul style="list-style-type: none"> Investment in hardware to protect data Investment in data security expertise Professional development and training for IT staff Comprehensive IT policies and practices that act to protect data Prioritizing data protection Obtain cyber-risk insurance
10. Governance and management quality	Internal Stable	High	<ul style="list-style-type: none"> Nominations process to identify new talent for boards and committees Regular review of performance Regular study activities to maintain currency of knowledge in the education sector Professional development for governors Strong internal discipline practiced by governing bodies Strategic nurturing of governance talent through committees Review and update terms of reference for all governance and management bodies Review membership of all governance and management bodies

10. Appendixes

Appendix 1 The ISF Academy: A Short History and Guiding Statements

1. The Independent Schools Foundation: Structure and Schools

The Independent Schools Foundation (ISF or the 'Foundation') is a charitable, tax-exempt organization founded for the purpose of promoting education in the Hong Kong Special Administrative Region of the People's Republic of China. The Foundation is the School Sponsoring Body (SSB) for the two schools under its oversight: The ISF Academy (founded in 2003), and The ISF Pre-School (founded in 2015). The Foundation sets the vision, mission, and values and strategic direction for all schools under the oversight of The Foundation and raises funds to support its educational mission.

ISF schools are not-for-profit institutions. The ISF Academy is classified by the Education Bureau of the Hong Kong Government as a Private Independent School (CAP 279 Schedule 3); it offers a comprehensive bilingual education from Foundation Year to Grade 12, including the International Baccalaureate's (IB) Middle Years Programme (MYP) and the Diploma Programme (DP) in Grades 6-10 and Grades 11-12 respectively. The ISF Pre-School is registered as a kindergarten, currently offering K1 and K2 half-day bilingual classes.

2. Vision, Mission, and Core Values

To achieve its ultimate purpose, the ISF must ensure that its direction of development and its ultimate goals are embedded in its framework of guiding statements: the vision, mission, and values statements of the ISF. Firstly, we must answer the following three questions:

Vision: what does the ideal ISF future look like – where are we going?

Mission: what is the ISF doing now operationally to realize that ideal future?

Values: how does the ISF go about its work to achieve that future?

The guiding statements of the ISF are essentially informed by our responses to these three questions. These statements provide the strong, resilient, and consistent framework to guide the daily business of the ISF and its developmental direction. They inform our thinking, planning, and decisions. They are specific and should be used to make intelligent choices between competing and equally meritorious ideas. They help the ISF make difficult or complex choices between equally meritorious options, deciding what to do, which initiatives to pursue and which to decline.

At the ISF, all actions must align with core values.

3. ISF Vision

The ISF is a community of learners, **independent** in thought and action, deeply rooted in **Chinese** culture, **global** in understanding and experience, and excellent in all endeavors.

4. ISF Mission

The Mission of the ISF is to promote education that is:

- **Independent:** Nurturing creativity, critical thinking, and a lifelong love of learning for academic, personal, and social development;
- **Chinese:** Educating learners in a uniquely Chinese-English bilingual and East-West bicultural environment rooted in timeless Chinese values embodied in the *Eight Virtues + One*; and
- **Global:** Building life skills through experiential learning, inspiring learners to act as empowered and resilient global stewards.

5. ISF Core Values

All members of The ISF Academy follow the *Eight Virtues + One*, showing this in the following ways:



Zhong

I am diligent and responsible for those things to which I have fully committed myself. I am true to others and myself. I strive to realize the ISF ideal.



Xiao

I am respectful to others. I respect parents, teachers and cultural heritage. I build on past knowledge and experience as I learn and create new things.



Ren

I am kind and compassionate to others and help without thought of reward. I care for the environment, peace and future.



Ai

I am passionate about learning and life. I am full of curiosity about our world. I am made complete through compassionate self-sacrifice.



Li

I am polite and respectful to others. I am disciplined and think before I act. I embody the cultured and exemplary behavior of the true "Lady" or "Gentlemen".



Yi

I am principled, pursue justice, and stand up for my beliefs. I am confident and take risks. I am trustworthy.



He

I value and pursue harmony with others. I rejoice in multicultural immersion.



Ping

I pursue balance and maintain a healthy mind and body. All people are equal and treated fairly.



Zhi

The *Eight Virtues + One* are the living principles of The ISF community, where intelligence and wisdom are built on the foundation of the Eight Virtues, and which guide us to exercise judgment and make right choices in our life's journey.

6. The ISF Learner

The ISF's learning programs develop learners who reflect the ISF's key descriptors: **Independent, Chinese, Global**. Our learners develop independence by learning to think critically, communicate effectively and by participating in experiential learning programs which promote self-esteem, responsibility and compassion. ISF learners are strongly connected to Chinese culture through language immersion in a rich Chinese cultural setting, and deep appreciation of Chinese traditions and moral values. ISF learners also have a rich global engagement, physically through exposure to other countries and cultures, and intellectually, through mastery of the English language and particularly through the globally oriented curricula of the International Baccalaureate (IB).

ISF learners engage positively and purposefully in learning activities that help them master the skills of analysis, develop perspective and judgment, respect all living things, as well as communicate, connect, and be empowered to act within the community at large.

Using the principles of the core ISF values – the *Eight Virtues + One* – learners grow and mature to become active, contributing, and ethical members of society. This is put into practice through the expectations placed on personal interaction within ISF schools, through local community service, and through service projects abroad. All members of our learning community, from the most junior to those of advancing years, are expected to live 'virtuously' and seek the 'One' – wisdom.

7. An ISF Definition of Learning

The experience of learning at ISF is unique to the institution and is informed by the guiding statements.

At ISF learning is defined in the following ways:

- Learning promotes independence in thought and action;
- Learning is deeply rooted in Chinese culture;
- Learning develops global understanding and experience;
- Learning reflects a personal commitment to excellence;
- Learning is immersed in a Chinese-English bilingual learning environment;
- Learning is informed by the ISF core values: the *Eight Virtues + One*;
- Learning promotes creativity, critical thinking, and a lifelong love of learning;
- Learning empowers global stewardship; and
- Learning is experiential.

8. An ISF Definition of Global Stewardship

The ISF Academy and The ISF Pre-School use Global Stewardship in place of Global Citizenship. Stewardship implies caretaking without ownership; this responsibility is temporary in nature, and is inherited by the next generation of Global Stewards.

A definition for The ISF Academy and The ISF Pre-School Global Stewardship is reflected in the three principal domains of the human experience: *being, knowing, and doing*. As such, global stewards:

- Are deeply rooted in their home community and broadly connected to the global community of humankind (*being*);
- Learn continuously, experientially, reflectively to grow in their understanding of the richness and complexity of the world as an interconnected, single ecosystem (*knowing*); and
- Act responsibly, wisely and collaboratively as caring stewards to build a better and more peaceful world, exercising foresight in the present to protect the future, while honoring the past (*doing*).

9. A Brief History of ISF

The Independent Schools Foundation was formally established in February 2000 as a registered charitable organization to provide diversity in choice of education for Hong Kong students. The Foundation emerged as a formal entity from a series of informal discussions about the future of education in post-colonial Hong Kong that took place in the years immediately following the return of Hong Kong to Chinese sovereignty. These informal discussions, involving founding members of what was to become The Foundation's Board of Governors, were followed by a series of more formal planning meetings that led to the submission of a successful bid to establish an independent school on a piece of land offered by the Hong Kong Government in the newly developed precinct of Cyberport in Pokfulam, on the western edge of Hong Kong Island.

In 2003, The Foundation established a not-for-profit, Private Independent School, The Independent Schools Foundation Academy (The ISF Academy), to offer a world-class bilingual, bicultural Putonghua and English language education. Starting with just 56 students in Grade 1 to 4 in August 2003, The ISF Academy commenced operations at a temporary campus in Wan Chai, later expanding to a second temporary campus in Causeway Bay. In July 2007, The ISF Academy moved to its permanent home at the site of the former Kong Sin Wan Village adjacent to Cyberport, in Pokfulam.

In February 2008, The ISF Academy commenced its Foundation Year program, a preparatory year for students prior to Grade 1.

After gaining authorization to offer the International Baccalaureate (IB) Middle Years Programme (MYP) in 2009, followed by the IB Diploma Programme (DP) in 2010, the first class of 23 Grade 12 students graduated in 2012.

In 2014, following two years of self-study and preparation, The ISF Academy was accredited by the Council of International Schools (CIS) and the Western Association of Schools and Colleges (WASC).

In 2015, The Foundation established The ISF Pre-School to offer a program of bilingual kindergarten education. Based in Sheung Wan, The ISF Pre-School has an enrolment of over 200 students; it offers an adapted version of the International Early Years Curriculum. Approximately 90% of The ISF Pre-School's graduates are accepted to study at The ISF Academy.

An alumni association was established in 2016 to facilitate the ongoing relationship graduates have with each other and other members of the ISF community. With a membership in excess of 200 and an advisory board, the ISF Alumni Association is building a global network of alumni and former students through social events, reunions, school visits, and seminars.



Temporary Campus in Wan Chai in 2003



Campus in Pokfulam in 2018

10. ISF Structure and Governance

There are currently three not-for-profit companies limited by guarantee that comprise the ISF 'group':

1. The Independent Schools Foundation Limited ('Foundation'): a not-for-profit company limited by guarantee, the Foundation is the 'School Sponsoring Body' for The ISF Academy and The ISF Pre-School (see Education Ordinance, Cap 279 s.3); its main office is co-located with The ISF Academy at Kong Sin Wan Road, Pokfulam. The Foundation is governed by its Board of Governors.
2. The Independent Schools Foundation Academy Limited ('Academy'): a not-for-profit company limited by guarantee, the Academy operates as a registered school operating in Kong Sin Wan Road, Pokfulam, Hong Kong. The ISF Academy is governed by the School Management Committee (SMC).
3. The ISF Pre-School Limited ('Pre-School'): a not-for-profit company limited by guarantee, The ISF Pre-School operates as a registered kindergarten, currently located in Po Yan Street, Sheung Wan, Hong Kong. The ISF Pre-School is governed by The ISF Pre-School Board of Governors.

Appendix 2 ISF Target Universities and Colleges

The colleges and universities are arranged in alphabetical order. The choices are based on global ranking lists including, but not limited to, the Times Higher Education World University Rankings 2019, QS World University Rankings 2019, Forbes 2019, and U.S. News and World Reports 2019. Universities on this list are selected on the basis of ISF student interests and range of applications submitted.

Name	Country / Special Administrative Region
Australian National University	Australia
Boston University	United States
Brown University	United States
Chinese University of Hong Kong	Hong Kong
Claremont colleges (including Claremont McKenna, Pomona, Pitzer, Harvery Mudd)	United States
Columbia University	United States
Cornell University	United States
Dartmouth College	United States
Duke University	United States
Durham University	United Kingdom
Erasmus University Rotterdam	Netherlands
Georgetown University	United States
Harvard University	United States
Hong Kong University of Science and Technology	Hong Kong
Johns Hopkins University	United States
Massachusetts Institute of Technology	United States
McGill University	Canada
National University of Singapore	Singapore
New York University	United States
Northeastern University	United States
Northwestern University	United States
Peking University	China
Princeton University	United States
Rice University	United States
Stanford University	United States
Tsinghua University	China
University of Amsterdam	Netherlands
University of British Columbia	Canada
University of Bristol	United Kingdom
University of California (including Berkeley, UCLA, San Diego, Davis, Santa Cruz, Santa Barbara)	United States
University of Cambridge	United Kingdom
University of Chicago	United States
University of Edinburgh	United Kingdom
University of Hong Kong	Hong Kong
University of Illinois at Urbana-Champaign	United States
University of London (including UCL, SOAS, King's College London, Imperial, LSE, Royal Holloway)	United Kingdom
University of Massachusetts (including Amherst, Boston)	United States
University of Melbourne	Australia
University of Michigan, Ann Arbor	United States
University of Oxford	United Kingdom
University of Pennsylvania	United States
University of Queensland	Australia
University of Sydney	Australia
University of St Andrews	United Kingdom
University of Toronto	Canada
University of Virginia	United States
University of Washington	United States
University of Warwick	United Kingdom
University of Wisconsin-Madison	United States
Washington University in St. Louis	United States
Yale University	United States

Sources:

Times: https://www.timeshighereducation.com/world-university-rankings/2019/world-ranking#!/page/0/length/25/sort_by/rank/sort_order/asc/cols/stats

QS: <https://www.topuniversities.com/university-rankings/world-university-rankings/2019>

Forbes: <https://www.forbes.com/top-colleges/list/>

U.S. News: <https://www.usnews.com/best-colleges>

Appendix 3 School Logo: History and Meaning

The ISF logo was first sketched out from, and is intended to represent, the Chinese character " 立 ", using the Chinese and English names of the school as the bottom line of the character. The design evolved to encompass certain concepts which are the tenets of the school culture.

The blue part of the logo appears as a budding flower, or a child with open arms when one looks with both heart and mind. It is almost a circle, with an incomplete circumference. The observer may choose to complete the circle with imaginary curves, or leave the circle open. The blue segments appear to be breaking out of their imagined boundaries. The blue parts are of different sizes and shapes, symbolizing diversity, and tolerance of imperfection. The asymmetricality of the design is intentional. The blue areas do not add up to make a completed circle; this is symbolic of the parts working together to make a whole which may be greater and closer to perfection. The blue shape extending beyond the very top of the logo can be seen as the flame of a candle, a light for the world, or simply an idea, an act, or whatever else that may lead the learner to reach beyond the present world into the future.

There are three intersecting arcs that are depicted in white. Together they form the core of the design, symbolizing the intertwined tripartite relationships: humility, humanity, and humor, which form the habits of mind of every educated person; respect, responsibility, and safety, which are the principles for all civilized behavior; and students, teachers, and parents, which are the three components of a learning community.

The color brown was chosen for the Chinese and English names of the ISF. Brown is representative of the color of earth or the ground: learners have their feet deeply rooted in the culture and geography of their home, but are prepared to take flight one day to create a better and more peaceful world.



弘立書院
THE ISF ACADEMY





Students at learning 學生正在學習



Dance2Enhance 競舞乾坤



The 15th anniversary 15周年慶典



Sports day 運動日



The 15th anniversary 15周年慶典



Faculty and staff 教職員

ISF Earth Day 弘立地球日



Cleaning a beach 清潔海灘



Experiential learning programs 體驗學習課程



Experiential learning programs 體驗學習課程



Sports day 運動日



Experiential learning programs 體驗學習課程



弘立書院
THE ISF ACADEMY



