

2024-2029
ISF
STRATEGIC
PLAN



ISF 弘立



弘立校友會
ISF Alumni



INNOVATION • ASPIRATION
COLLABORATION • EDUCATION

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A. CHAIRMAN'S FOREWORD

At the end of two decades of innovation and excellence since its founding, the Independent Schools Foundation (ISF) has proven itself as a leader in excellent, innovative bilingual and bicultural Chinese-English education in Hong Kong. The first two strategic plans (2011-16 and 2018-23) were highly aspirational, resulting in all major initiatives being completed by the conclusion of 2023. Even more remarkably, given the volatility and challenges faced in recent years, the key performance indicators relating to enrolments, academic outcomes, college placements, staffing, and finances were all exceeded by a clear margin. Furthermore, outstanding outcomes were also achieved in the key strategic projects, including Wellbeing for Learning, *Shuyuan* STEM + Arts, *Eight Virtues + One* Curriculum Framework, *Qilin* Literacy programs, the ISF Pre-School Development Program, and the Inspire Fundraising Campaign. This outstanding record of institutional achievement is something in which the ISF community can take great pride.

At the start of this third phase of strategic development, with enrolments at record levels, enviable college placements, strong staff retention, and fully constructed facilities, the strategic focus must now turn from the largely completed task of building ISF as a center for outstanding learning to creating a truly future-focused approach to learning, one that anticipates the challenges and trends that our graduates must face in the coming decades with perceptive agility and foresight. A high level of competency in Chinese language and culture remains a core element of this aspiration. There is now an even more pressing need to enhance innovative programs that emphasize essential skills and knowledge in STEM + Arts (Science, Technology, Engineering, and Mathematics + Arts). The world of the future is one in which Artificial Intelligence (AI) will increasingly play a leading role in all human endeavors. Education must equip the young with the skills and knowledge needed to achieve mastery in the field of AI.

A uniquely distinguishing feature of learning at ISF, The *Eight Virtues + One*, provides the moral compass and practical wisdom that ISF graduates will need to succeed in life beyond school. This mature and highly developed system of thinking about self and others, provides the framework in which ISF learners can identify the essential elements that inform every choice in life, from personal relationships through to vocational decisions. ISF learners of all ages will continue to be guided and inspired by The *Eight Virtues + One*.

The 2024-29 ISF Strategic Plan, as a statement of institutional aspiration, has been informed by the challenges and hard-earned lessons arising from the difficulties experienced over the past five years in Hong Kong. Accordingly, the plan recognizes the need for agile responses to unprecedented circumstances, deep reflection on institutional challenges, courage to innovate, and an abiding commitment to core values that infuse and inform every aspect of the ISF community.



John M Y Yan, S.C.
Chairman
Board of Governors
The Independent Schools
Foundation

B. REVIEW OF THE 2018-23 STRATEGIC PLAN

The second ISF Academy Strategic Plan was drafted during a period of intensive construction and infrastructure development in 2016-2017. As a result, publication of the new strategic plan was delayed until the completion of major construction in 2018. Major works undertaken during the 2018-23 plan include the completion of all Phase III construction, including the commissioning of A Block and C Block, Charles Kao Square and C.F. Clifford Wong Secondary Library, and the ISF Gallery project. The option to pursue a potential fourth phase of development, listed as Phase IV in the plan, has not been exercised at this time.

The key operational targets and milestones published in the second strategic plan were organised under four key directions: **Learning, Leadership, Support, and Infrastructure**. Each direction was supported by a short list of major projects, priorities, and key performance indicators (KPIs). The following table details progress achieved in each of the major projects and programs.

Key Direction	Project/Program	Status
Learning	Wellbeing for Learning	Ongoing: all ISF students, faculty, staff, and parents support
	<i>Eight Virtues</i> Curriculum Project	Completed: implemented in Primary School and Pre-School
	<i>Shuyuan</i> STEM + Arts	Ongoing: implemented in Primary School and Secondary School 70 <i>Shuyuan</i> programs and 91 <i>Hao Xue</i> programs
	<i>Qilin</i> Literacy Program	Completed: implemented in Primary School (Grade 1-5) and Secondary School
Leadership	Experiential Learning Center	Tenancy secured in February 2024
	Co-curricular Activities Program	545 programs, 9,200 participants annually
	Scholarship Program	450 scholarships awarded
	Research programs	Ongoing
Support	Enrolments	Exceeded 2,000 minimum in 2020
	Learning Support Services	Established Li Ren Center; 1,100 support cases; 6,500 observations
	Funding support for <i>Shuyuan</i> programs	Implemented
	Inspire Campaign (Fundraising)	Concluded in 2023, HK\$516 M raised
Infrastructure	ISF Pre-School Development Project	Completed in 2020
	Makerspace	Construction completed in 2018
	Strategic partnerships	Ongoing
	Phase IV facilities	Postponed



The second strategic plan set ambitious goals for seven key strategic projects and programs, each with a particular learning focus. The following offers a summary of each major project:

- **Wellbeing for Learning Program:** this program operated continuously throughout the duration of the plan and was highly effective in supporting learning during the pandemic (2020-22); the Wellbeing for Learning program supported all ISF students, teaching faculty, and parents; it is to be incorporated into the new 2024-29 plan in an enhanced form that reflects the growing maturity and depth of student support mechanisms.
- **Shuyuan:** this program of academic innovation, commenced in 2010, continued as the experimental arm of ISF and was successful in offering programs of study and research in all of the disciplines detailed in the 2018-23 strategic plan. The establishment of Shuyuan Studio to nurture creativity was particularly notable. The construction of the new Molecular Biology Laboratory (MBL) in 2018 created a hub to conduct an extensive and world-spanning suite of research programs, resulting in an impressive number of publications, genome announcements, and conference presentations. The existing laboratory has now reached maximum capacity and a new laboratory is in planning (see MBL 2.0). Shuyuan offers a total of 70 courses and programs.
- **Hao Xue:** in Secondary School Hao Xue is now in its third year. Originally inspired by learning concepts developed in Shuyuan, Hao Xue has evolved over time in response to student learning needs. It consists of six domains of inquiry offering 91 discrete bespoke vertically integrated elective courses to Grades 6-9.
- The **Eight Virtues Curriculum** has been successfully implemented in both the Primary School of the Academy and the Pre-School; it continues to evolve as a curriculum framework for the unique ISF approach to bilingual education.
- **Experiential Learning Center:** The search for a remote experiential learning center was carried out throughout the duration of the plan. Sites in Hong Kong, Taiwan, Thailand, Malaysia, New Zealand, and Australia were evaluated. An application for a short-term tenancy at the former Shek Pik Red Cross Youth Camp was lodged in December, 2019. The application was ultimately successful, and the site was handed over to Bauhinia Experiential Learning Limited (BELL), part of the ISF group, in February, 2024.
- **Xiao Qilin Accelerated Literacy Program:** originally aimed at Grade 1 students and launched more than a decade ago, the Qilin approach to literacy was extended to Secondary School through the Zhong Qilin writing program. This program was developed over a period of five years and is fully implemented at the time of this review.
- **The ISF Pre-School Development Project:** a new site in Kennedy Town was secured and developed from a bare shell to serve as a purpose-built early learning facility. The Pre-School, further extended in 2023, is now home to more than 300 students.
- **Inspire Fundraising Program:** this fundraising campaign concluded on 31 July 2023; the campaign raised HK\$516 million.

Success in the discrete strategic projects summarised above is certainly one measure of performance. However, evidence that these projects and programs work together to achieve excellence in educational programs must also form an important part of any meaningful review.

One compelling external measure of the overall academic standing of ISF internationally in a comparative sense is offered by the Centre of Evaluation and Monitoring (CEM) through its value-added metric. For participating schools around the world, the value-added measure compares the potential academic achievement level of each student against the actual result achieved by graduation. Schools are then ranked in percentiles according to the extent to which the actual result exceeded the predicted result for a given cohort of students; this gap is defined as the 'value-added' measure of the school. Participating institutions include schools offering A-levels, IB Diploma, AP, and other senior curricula. ISF participates annually in the IB edition of this cognitive predictive test. The following table shows the global Value-Added percentile ranking of ISF over the past six years:

- | | |
|---|--|
| • 2018-19: 92 th percentile | • 2021-22: 98 th percentile |
| • 2019-20: 97 th percentile | • 2022-23: 97 th percentile |
| • 2020-21: 100 th percentile | • 2023-24: 98 th percentile |

A more detailed table of ISF performance against its published KPIs is provided at Appendix 9.



THE ISF 2024-2029

STRATEGIC PLAN



C. THE ISF 2024-29 STRATEGIC PLAN

1. Introduction: ISF Strategic Planning

The 2024-29 Strategic Plan is founded on three core guiding statements: the ISF Vision, Mission, and Core Values (see Appendix 1). These three statements describe the ideal future (Vision), the tasks undertaken to achieve that future (Mission), and the way in which all members of the ISF community work together to achieve that ideal future (Core Values). These three guiding statements have been in place guiding ISF's developmental trajectory for 15 years; they are widely recognized, understood, and embraced by the ISF community; they continue to serve ISF as the foundational principles that inform and direct all our endeavors. A number of key supporting principles and definitions are derived directly from these statements (for example: the ISF Learner, ISF Definition of Learning, ISF Definition of Global Stewardship; see Appendix 1)

The first strategic plan (2011-2016) had the Academy as its focus; it was primarily focused on creating and consolidating the core principles and practices of an ISF education. The second plan (2018-23) offered a broader vision of the developmental direction of an 'emergent' ISF group; it was primarily focused on completing infrastructure projects and pursuing more ambitious and complex educational innovation. The structure of the ISF group was consolidated and further developed over the term of this second plan (see Appendix 2).

This third strategic plan (2024-29) assumes as a point of departure that all principles, policies, practices, initiatives, standards, and projects undertaken over ISF's first two decades remain relevant, active, and in practice. This plan does not, therefore, reiterate these 'givens' that form the essential elements of ISF's identity; to do so would be redundant.

This plan does, however, mark an important turning point for ISF. The inwardly focused development of infrastructure, systems, curricula, resources, pedagogy, and practices is now largely in place. The outwardly focused, broader educational mission of ISF, enshrined as a fundamental purpose in its corporate identity, will incrementally assume a more central strategic role in the execution of this plan. While innovation in learning still occupies the central place in the ISF mission, supported by enabling aspirations, and collaboration with like-minded partners, serving the broader community at home and beyond through education takes the spotlight as a logical and evolutionary step for ISF.

The plan outlined in the following pages, therefore, is a statement of aspiration and intent. Pursuing our ideal vision of the future through mission-based tasks, informed by our core values, the plan provides clarity to undertake concrete actions towards its fulfilment. The plan will necessarily undergo regular review and evaluation by management and governors; if needed, it can be adjusted, revised, or enhanced, according to circumstance. Ideally, the plan elaborated in the following pages will serve as a blueprint for our work together as we enter the third decade of the ISF journey.

2. The Four Key Drivers of ISF Strategic Development: 2024-29

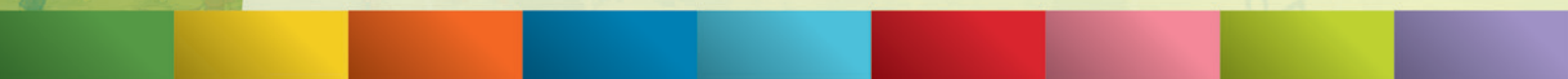
The ISF 2024-29 Strategic Plan is comprised of four key drivers: *innovation*, *aspiration*, *collaboration*, and *education*. Each driver consists of a 'couplet' that expresses its theme and intended outcome, all of which reflect the core elements of the ISF mission; each driver supports strategically important and thematically relevant projects or programs.





KEY DRIVER

INNOVATION LEARNING



3. INNOVATION: LEARNING

Innovation in ISF learning programs forms the first core element of the strategic direction for ISF in the coming five years. *Learning* as a purpose and outcome is at the center of ISF’s vision, mission, and values. *Wellbeing* for Learning underpins and supports learning (see Appendix 1). *Learning*, as a key strategic driver, prioritizes innovation across all learning programs and activities for all ISF entities. Innovation is to focus on:

- **Chinese language and culture:** further enhancements to Chinese literacy through *Xiao Qilin* and *Zhong Qilin*; experiential engagement in Chinese language and culture for young learners through *Chinese Creativity and Culture*;
- **STEM + Arts:** evolutionary development of *Shuyuan* and *Hao Xue* to expand and deepen ISF’s unique school-based curricula, with particular emphasis on scientific research and the educational applications of Artificial Intelligence (AI);
- **Experiential learning:** expanding the range of experiential learning options offered to ISF students; operationalizing the Shek Pik experiential learning center in Hong Kong; and
- **Research and development:** building the range and quantity of ISF research projects, publications, presentations, training, and community outreach in selected fields, including: molecular biology, nanotechnology, sustainability, AI, and Chinese language acquisition research.

The operational ‘vehicles’ for learning innovation in ISF schools are *Shuyuan* and *Hao Xue*, both of which will continue to serve as learning laboratories to experiment, innovate, and refine new ideas and approaches to learning at ISF.



Innovation: Learning

STEM + Arts

- ISF School-based curriculum
- *Shuyuan*: STEM Research
- *Hao Xue*: Grade 6-10 curriculum innovation
- Maths for Engineering
- Computer Science
- Smart Cities
- Maker education
- Sustainability Education
- Artificial Intelligence Laboratory

Chinese Language & Culture

- *Shuyuan*: Classical Chinese & Western Classics
- *Hao Xue*: Grade 6-10 Chinese curricular innovation
- Chinese Research Center: conferences & publications
- *Qilin* project: *Xiao Qilin* & *Zhong Qilin*
- Comparative philosophy
- ISF Chinese Language proficiency standards

Research

- Molecular Biology Laboratory: genome announcements and publications
- Nanotechnology & materials research
- Robotics
- Data science
- Publications (Bauhinia, Aquilaria, ASM, AGU, AOGS, IEEE)
- Conference presentations
- Collaborative research with external partners
- Learning Analytics System (LAS)

Experiential Learning

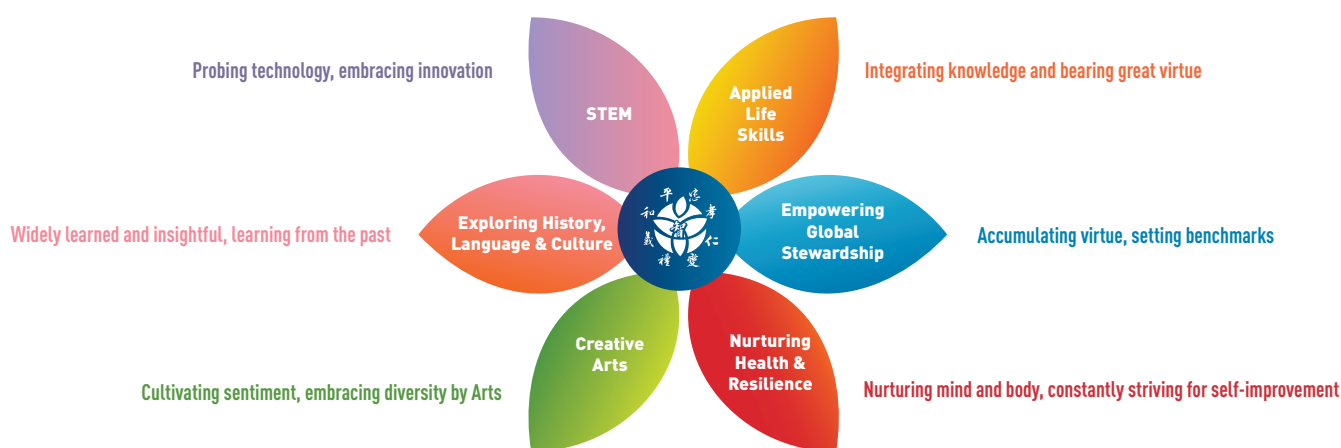
- Experiential learning programs
- Co-curricular activities
- Shek Pik Center for Experiential Learning
- Service and Stewardship
- Compassion education

3.1 Hao Xue

Hao Xue seeks to instil in students a lifelong love of learning by cultivating in each learner an agile mind, learning heart and humble spirit. *Hao Xue* encompasses the various ways in which we create choice and flexibility in our student experience.

In Grades 6 to 8, and for the first semester of Grade 9, *Hao Xue* enrichment courses provide a time and space devoted to innovation and learner wellbeing, where students can dedicate themselves to their passions and to learning how to bring their ideas and aspirations to life. For these grade levels, the program runs every Wednesday afternoon. A range of courses are offered and students are able to select from these according to their interests. At present, 91 courses are on offer, some to specific grade levels, others to students from any grade level involved in the program. There may be some changes to the number and content of *Hao Xue* courses on offer from year to year. The *Hao Xue* program is founded on six thematic domains:

- Applied life skills;
- Creative Arts;
- Empowering global stewardship;
- Exploring history, language and culture;
- Nurturing health and resilience; and
- Science, Technology, Engineering, and Mathematics (STEM)



Grades 6 to 9 *Hao Xue* enrichment option courses are delivered by Secondary teachers and members of the ISF Shuyuan and Co-Curricular Activities teams. Teachers offer courses that reflect their own passions and expertise, sharing their love of learning with students.

With the development of these *Hao Xue* enrichment courses, so too will the learning aims for each of the six domains outlined above be refined and extended. In turn, the *Hao Xue* initiative seeks to ensure that learning innovation also connects logically and directly to the ISF core values: The *Eight Virtues + One*. In planning *Hao Xue* enrichment courses, teachers construct learning experiences that relate to aims from the relevant area and in turn reinforce The *Eight Virtues + One*.

Beyond the enrichment courses detailed above, *Hao Xue* reflects an evolutionary development in the way that curriculum is planned and implemented at ISF. It offers a diversity of choice and flexibility, providing students with a rich learning experience that instils a lifelong love of learning. In particular, the six domains of *Hao Xue* reflect a more comprehensive set of learning experiences to support the transition of younger learners from Primary School to the first three years at Secondary School. During these years, through the core MYP curriculum, co-curricular programs, *Hao Xue* enrichment courses, Experiential Learning Programs (ELP), House activities, etc., ISF students are able to explore identity and culture in a richly nuanced and meaningful way.

As students move into Grade 9, their experiences are increasingly guided by the subject choices they plan to make in the IB Diploma, along with the IB Diploma core. In Grades 9 and 10, students are given the choice and flexibility to discover their passions and strengths within subject groups through modular courses offered in Individuals and Societies and Sciences (MYP). Meanwhile, students are given flexibility within their main timetable to select two of the subjects that they will study. They are provided with options including MYP Arts and Design and a range of courses offered by Shuyuan through *Shuyuan* Studio, Classics and STEM. These options deepen the foundation provided by MYP and our enrichment courses and allow students to build an individualized pathway to IB Diploma.

3.2 *Shuyuan* Program Developments: MBL 2.0

The success of the first Molecular Biology Laboratory (MBL), located next to the Clifford C.F. Wong Secondary Library, has established ISF as a world-class research center with a growing reputation for excellence in microbiology. The growing volume of published research and the growing number of external citations of ISF student research offer clear evidence to support this claim. Capacity constraints in the current laboratory prompted the search for a donor to support the construction of a new laboratory. With funding secured in late 2023, a new laboratory has been constructed in 2024 to support an expanded program of advanced research in molecular biology.



3.3 Chinese Language Proficiency

For ISF learners, the IB Diploma is currently the only recognized academic benchmark used to gauge proficiency in written and spoken Chinese. The IB Diploma provides a useful academic measure of proficiency, but one that is not necessarily suitable for all applications beyond academia, particularly in the business world or other professional fields. The growing demand for professionals with job-ready Chinese language skills points to the need for the identification of alternative measures of Chinese language proficiency that will offer employers of the future a more accurate measure of the broader, vocational linguistic skills offered by ISF graduates.



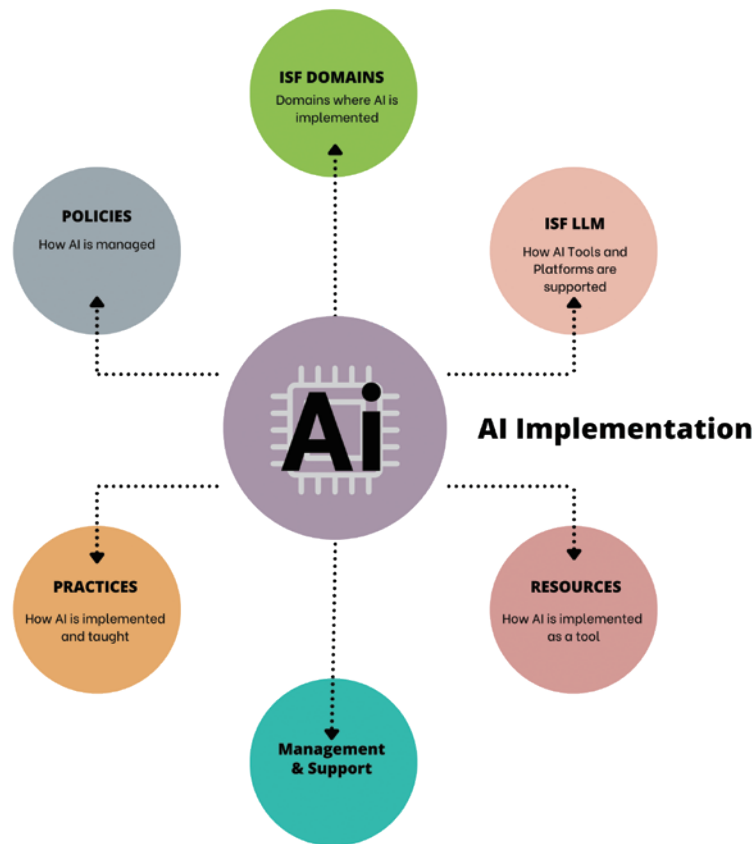
3.4 Experiential Learning Center: Shek Pik

The final strategic planning target achieved in the ISF 2018-23 Strategic Plan was the establishment of an external center for experiential learning. The center was secured on a five-year lease in February 2024. The experiential learning focus in the 2024-29 Strategic Plan will see the operationalization of the Shek Pik site for students across all grade levels. The programs to be offered at the site will include day trips and more extended overnight programs. Eventually, the Shek Pik Experiential Learning Center will also offer experiential learning opportunities to non-ISF participants, as a part of ISF's strategic community outreach.



3.5 Artificial Intelligence Laboratory (AI Lab)

The AI Lab is a K-12 learning space that will teach about AI to the entire ISF community, students, faculty, and family members. The AI Lab will also be a research center for students and faculty.



The field of AI is changing rapidly, and the establishment of this Lab will allow ISF Academy to keep abreast of current developments and promote the ethical use of AI based on the principles of *The Eight Virtues + One*. Establishing the AI Lab will give our students the skills and understanding needed for the future.

Future employment will rely on skills connected to data science, large language models, complex systems understanding, and the use of digital tools. The applications of these skills will impact all aspects of society, from the sciences to the arts.

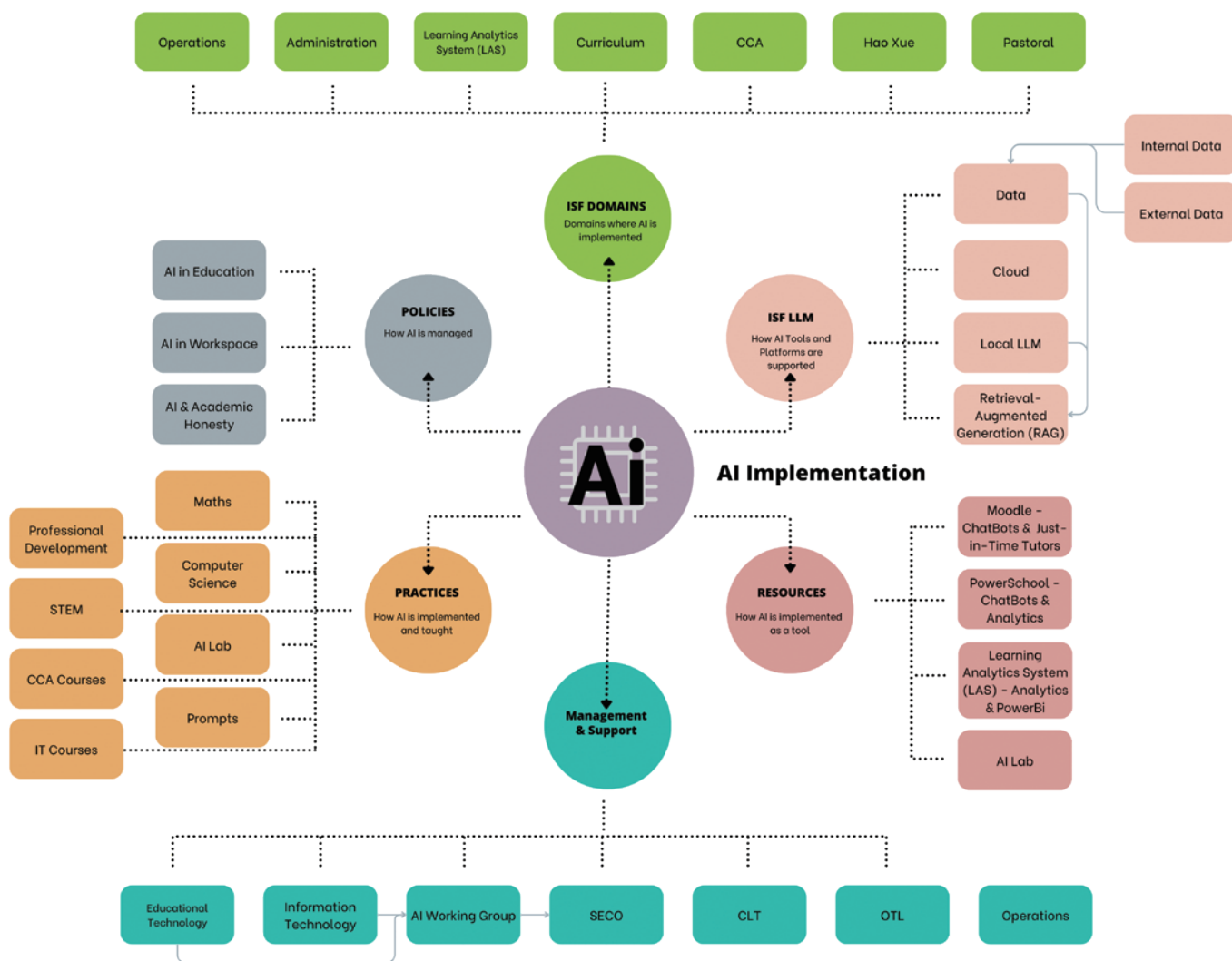
The AI Lab will focus on the following conceptual understandings and relevant domains of knowledge in the ISF learning context:

- Computer science
- Data science
- Large Language Models
- Prompt design
- Metaverse creation
- AutoCAD and 3-D modeling
- Complex bioinformatics for molecular biology applications (datasets to be stored and managed by the AI Lab)
- Geosciences
- Real-life applications in medical diagnostics
- Chinese/Western Classics interpretations and translations
- Sustainability datasets

Equally as important will be the use of data science in the field of sustainability. Currently, ISF Academy generates sustainability data for air pollution, waste management, food waste, and energy usage. Students at ISF Academy study the urban environment through a unique program delivered by the Urban Land Institute. This program looks at all aspects of the built environment. Students extend this study to look at the Internet of Things (IOT) solutions through the Smart Cities program at Columbia University. This learning and understanding of complex systems will prepare our students for a warming global environment.

AI Lab will also serve as the training space for faculty professional development in all aspects of artificial intelligence. Faculty will need to learn how to use AI for curriculum design and work skills changes. The program of professional learning known as the 'Learning Technology Integrators' will be supported by the AI Lab. This program will need to be enhanced to meet the needs of the faculty in the field of AI.

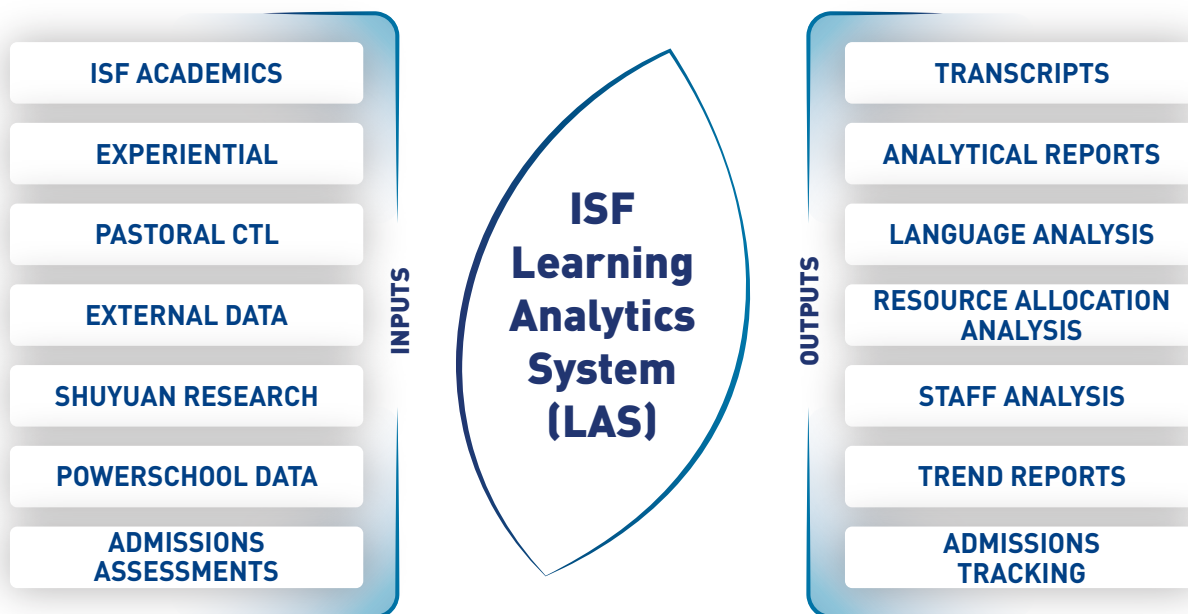
ISF Academy is also a research center for both students and faculty. It is our intention to use AI as a tool for action-based educational research.



For more detail, refer to the AI Project Mapping in Appendix 10.

3.6 Learning Analytics System 2.0 (LAS 2.0)

Following the unsuccessful search for a commercially available and effective data management system that could store and analyse information related to student learning, a project was launched in 2019 to design a bespoke system designed to meet the needs of ISF learners. The Learning Analytics System (LAS 1.0) was initially designed around the following learning-related inputs and outputs:



The first phase of LAS development involved an intensive period of stakeholder consultation across all schools and programs, platform development, and end-user trials to test its effectiveness against the original project specifications. With Phase 1 of the LAS project now complete, the next development phase (LAS 2.0) will focus on creating more advanced systems to collect, store, and analyse a wider range of data connected to student learning, particularly in relation to student wellbeing and affective aspects of the learner experience at ISF.



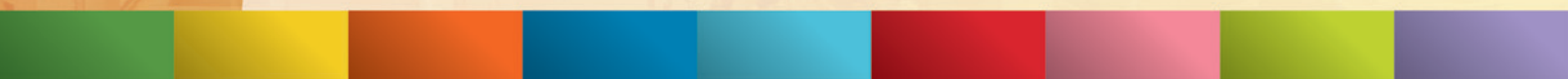


The 15th
Secondary

KEY DRIVER

ASPIRATION

ENABLING



4. ASPIRATION: ENABLING

Aspiration focuses on creating the resources to support learning innovation. This key driver recognizes that aspirational learning innovation involves exploratory and experimental initiatives that require a period of incubation before operational implementation. Aspiration, as a key strategic driver, will be reflected through:

- Fundraising through the Foundation for specific projects and purposes
- Construction and creation of unique learning environments
- Provision of financial support
- Allocating strategic seed-funding for selected programs

Aspiration: Enabling

Funding Innovation

- Insight Campaign: HK\$200 million
- Project patrons (targeted sponsorships)
- Special project benefactors (investment in projects)
- Thematic donations

Evolving Learning Environment

- The H.J. Zhang Black Box Theater Upgrade
- Molecular Biology Laboratory 2.0
- B6 Chinese Research Precinct
- A Block Courtyard development
- A Block Entrance
- Cyberport Annex

Financial Assistance

- Financial aid
- Academic scholarships
- Special talent scholarships
- Shuyuan grants

Strategic Seeding

- Foundation sponsored special projects
- STEM research projects
- Ab initio funding for new learning programs
- Product innovation (Maker & Comp Science)

4.1 Funding Innovation

We face a rapidly evolving regulatory environment for fundraising in educational settings. The **Insight Campaign** development fund has set an achievable target of HK\$200 million over the next five years. These funds are to be raised through secondary market income from Capital Note transactions, private targeted sponsorship or patronage of special projects, direct donations, community fundraising through the annual 'Jam' and other events, and regular capital fundraising permitted under new government regulations.

4.2 Evolving Learning Environments

Through institutional maturation, emerging community and institutional needs, and curricular developments in authorized programs offered at ISF, existing learning environments are constantly evolving to meet new educational challenges. Some facilities require periodic technical upgrades, others are the subject of long-term site master development planning. The principles of sustainability will be put into practice in the development and operation of learning environments.

4.3 Financial Assistance

The Financial Aid obligations enshrined in the Service Agreement with the Hong Kong Government will be honored during the plan.

Grants from the Foundation for special projects (ab initio or within existing programs) will be made on the basis of a rigorous approval and review process to ensure clarity and suitability in terms of both purpose and performance.

Construction of new facilities, modification of existing facilities, or addition of new facilities, will be considered by the Buildings Committee (BC) of the Foundation and funded on the basis of priorities set by the Board of Governors. The following projects have been proposed as a part of the new strategic plan:

- Molecular Biology Laboratory 2.0: this project is the first to be undertaken in this new plan, with the addition of a new, expanded facility to support a greater number of students taking part in microbiological research;
- HJ Zhang Black Box Theater upgrade (Phase 2): after more than a decade of use, the audio-visual systems in use in this training theater need upgrading to reflect the current state of technology;
- A Block Entrance: the entrance to classrooms in A Block needs remodeling and upgrading to accommodate a higher volume of students now using this entrance;
- S.K. and Margaret Wong Gymnasium Courtyard and Staircase Redevelopment: the original staircase leading to the lower level needs redevelopment for enhanced student safety and more efficient utilization of the space;
- Cyberport Annex: the potential for expansion into the Cyberport precinct, and particularly Cyberport 5 (once constructed) should be explored; and
- Shek Pik Experiential Learning Center refurbishment: the refurbishment and restoration of the Shek Pik facility needs to be undertaken in stages of the next five years.

4.4 Strategic Seeding

Funds will be available to launch and support emergent strategic initiatives throughout the life of the strategic plan. The Foundation will monitor trends and developments in the global education sector and commit funds at its discretion.



5. COLLABORATION: CONNECTING

Collaboration as a key strategic driver recognizes that truly innovative and effective learning in the 21st century is a highly collaborative, cross-institutional cooperative undertaking involving multiple stakeholders in the local and global community. For ISF to be successful in its aspiration to be a leader in learning innovation, collaboration with partners who share the ISF vision and core values is essential. Collaboration therefore focuses on the establishment of strategic partnerships that will create innovative learning through joint research programs and projects. The key performance indicator in this key driver is the number of effective partnerships created and sustained to benefit ISF learning programs.

Collaboration: Connecting

Building Communities

- Cambridge Needham Research Institute
- Oxford Comparative Philosophy
- Columbia Teachers College
- Hong Kong University
- Urban Planning
- Cyberport Community
- Greater Bay Area Community

Engaging Stakeholders

- Alumni events (reunions, career support)
- Parent events (plenaries, Jam, open days, etc.)
- Governance research (school visits)
- Community outreach
- Public performances (Wushu)

Support and Service

- Service learning in Hong Kong
- Community projects in region
- Sustainability initiatives in Hong Kong
- Experiential programs collaboration

Empowering Future Leaders

- Leadership development programs and training
- *Ling Xiu* student leadership: elections, induction & training
- Student Council elections, induction and training
- Student participation in external events, competitions

5.1 Building Communities

Established partnerships with tertiary institutions and other academic or educational bodies are to be sustained and enhanced during the plan; new partnerships will be developed and nurtured, with particular focus on strategically important entities in the Greater Bay Area community:

- Needham Research Institute (NRI), University of Cambridge (History of Science and Technology in China);
- New College, University of Oxford (Comparative Philosophy);
- Teachers College of Columbia University (Smart Cities/Urban Planning);
- American Geophysical Union (AGU);
- American Society for Microbiology (Microbe);
- Asia Oceania Geosciences Society;
- Association for Experiential Education;
- Institute of Electrical and Electronics Engineers;
- Hong Kong University of Science and Technology (Mathematics); and
- Greater Bay Area community (technology – AI).

5.2 Engaging Stakeholders

Collaboration within and across key stakeholder groups will be promoted and supported during this plan. Priority will be placed on the following:

- Governance research through study visits to selected institutions, locations, and regions;
- Connecting alumni through reunions and other events to promote engagement in the future development of ISF and its educational programs and support through practical contributions from members of the alumni body;
- Parent-focused events to increase understanding of and engagement in ISF programs, such as the annual Jam, coffee mornings, parent service days, parent learning (Molecular Biology Laboratory), parent seminars, guest speakers, open days, etc.;
- Public performances by ISF students to showcase ISF educational programs; and
- Community collaboration with other institutions and bodies on projects aligned with ISF strategic directions and values.

5.3 Empowering Future Leaders

Future leaders from within the student and alumni bodies will be empowered and developed through programs, events, and activities aimed at developing leadership skills through experiences offered in collaboration with other entities, such as community service organizations. Other important activities aimed at developing leadership skills include:

- Interschool sporting competitions: ISSFHK, HSSFHK, HKSSF, ACAMIS among other competitions create opportunities for ISF student leadership to develop through team efforts in competitive settings;
- Experiential learning programs: students work in smaller groups and teams to overcome obstacles and achieve objectives in challenging and often remote settings under guided adult supervision with minimal intervention;
- Student-led co-curricular programs: students sponsor and lead co-curricular activities to develop specialized skills and raise awareness and/or funds to support causes;
- Focus on public speaking and public performance skills at all levels; and
- Student-led fundraising events and programs: students sponsor and stage public events to raise funds and awareness in support of ISF-endorsed causes.

5.4 Support and Service

Student focused and led activities and events that promote service to different entities and constituencies in the community provide an essential and highly experiential part of a complete education. Under this component of the strategic plan, support and service will be promoted through regular planned activities, including:

- Service learning: parent and student service days, service in support of selected charitable projects;
- Community projects: food drive, fundraising for selected causes, etc.;
- Sustainability in the wider community: promotion of sustainability and environmental awareness in Hong Kong; and
- Experiential program collaboration: using the Shek Pik Experiential Learning Center as a base, ISF students will collaborate with other students and community members on experiential programs.





The ISF
Secondary

KEY DRIVER

EDUCATION DEVELOPING



6. EDUCATION: DEVELOPING

Education as a key strategic driver confirms ISF's obligation to serve as an educational leader in the Hong Kong SAR. This obligation is fulfilled through the creation of educational programs and opportunities to the wider community, supporting and facilitating learning at all ages and across all sectors in Hong Kong. ISF will contribute to education in Hong Kong through outreach, sharing of facilities, training courses and programs, contribution to public discourse, sharing of practices with other schools and educational practitioners, and service to the community.

Education: Developing

Lifelong Learning

- Adult education & training (incl alumni & parents: AI, MBL, etc.)
- Alumni networking and upskilling
- Alumni coaching programs
- Adult micro-credentialing for ISF community

Education for Life

- Vocational education
- Life skills (personal: finances, career development, etc.)
- Life coaching (mentoring and peer support)
- Mindfulness and meditation (sessions and retreats)

Inspiring Educational Creativity

- Exhibitions
- Performances
- Workshops
- Publications (student fiction and poetry)

Training Educators

- Professional learning hub
- Graduate research for teachers and staff
- Professional Development for teachers (specialized)
- Teacher accreditations and qualifications
- Parenting training and workshops

6.1 Lifelong Learning

Lifelong learning needs to reflect a change in mindset, reflecting that graduating from school and/or university/college does not mark the end of learning or even formal education. Lifelong learning requires a mindset that acknowledges the evolution of learning across stages of life and reflects the everchanging needs of learners. ISF, as a community entity committed to learning at an institutional level and education at a societal level, must therefore develop the structures, skills, tools, programs, course content, outcomes, and credentials to support authentic lifelong learning. This is to be achieved through the following initiatives:

- Adult education and training: skills needed in the wider community by adults who have moved beyond the years of formal schooling, particularly for ISF alumni; programs include laboratory research programs, AI training courses, etc.;
- Alumni networking: supporting alumni as they mature and move through different phases of their working life, facilitating the development of younger alumni through the coaching and mentorship of older alumni;
- Alumni coaching programs: offering courses that provide targeted training in particular skills, or targeted training as coaches in particular domains; and
- Adult micro-credentialing for ISF community: providing interconnected mini-credentials or micro-credentials that sequentially support skill and knowledge development in strategically important fields, such as STEM/AI.

6.2 Education for Life

The ‘crowded curriculum’ of school often does not permit the acquisition of important life skills for young adults. Education ‘for life’ aims to fill this gap with the provision of some niche skills that young adults need for success in their personal and vocational lives after graduation. These include:

- Vocational education: in selected fields that are prioritized by ISF, some vocational training may be offered or supported in partnership with external providers;
- Life skills training for ISF community members: may include applied skills such as personal finances, food and wine appreciation, etiquette, public speaking, professional written communication, professional networking, interview skills, CV design and preparation;
- Life coaching: coaching and counseling for members of the ISF community who may need advice, guidance, or support at key points in their journey beyond school; and
- Mindfulness and meditation: ISF will develop further its program of mindfulness training for parents and family members.

6.3 Training Educators

Educators working in settings beyond ISF may be supported through training offered in areas of particular institutional expertise, such as STEM related fields, language acquisition, classical studies, research, and publishing. This initiative will include the following:

- Professional learning hub: establishing and sustaining professional learning hubs to support cross-institutional educational research;
- Graduate research for teachers and staff: supporting educators seeking to undertake advanced research in strategically important aspects of education, including STEM research in schools, language acquisition, and Chinese language education;
- Professional development for teachers: provision of direct training for non-ISF teachers in relevant fields, such as STEM and Chinese language and culture;
- Teacher accreditation and qualifications: supporting pre-service teacher training through university-sponsored practicums; and
- Parenting training and workshops: training parents in the art of parenting through targeted skills development and the provision of support groups.

6.4 Inspiring Educational Creativity

Inspiring creativity in the field of education in Hong Kong requires a balance of leadership, support, and practical demonstration. ISF can deploy its resources, talent, tools, and institutional culture to support a greater level of creativity in education. This will be supported through the following initiatives:

- Exhibitions: public exhibitions offer a community-wide vehicle to display and celebrate student creativity;
- Performances: events in the performing and visual arts open to the public support the lifting of awareness and standards in educational institutions in Hong Kong;
- Workshops: practical workshops open to both the Hong Kong SAR and educators in the region aimed at developing artistry, creativity, and innovation nurture a higher level of creativity in education; and
- Publications: ISF resources will be used to enhance and extend the existing body of regular publications to showcase educational creativity, at both a student and adult level in Hong Kong and beyond.



7. The Future of Work

Education is not an end, in and of itself: it serves a critically important social, cultural, economic, and political purpose, building communities and nations through the planned development of skilled and knowledgeable citizens. Education is fundamentally focused on the future, not the present or past. Those receiving formal education must be equipped with the expertise, experience, and knowledge to make their own unique contribution to humanity in the future.

For educators, anticipating the shape, form, content, and nature of a future-focused education is challenging, particularly in a world undergoing accelerating change, driven by multilateral forces, including technology, climate, politics, culture, resources, wealth, health, and wellbeing. The time frame for such anticipation at ISF is 15 years, as this is the span of an education that commences with three year-olds in the ISF Pre-School and culminates at graduation for 18 year-old young adults.

We must ensure that we strive for future excellence and relevance through the provision of educational programs that develop workplace-ready skills and competencies for leaders in diverse careers, some of which are only now emerging or may not be evident for some years to come. Authenticity, relevance, credibility, portability, and adaptability are the qualities that must inform a complete education in the 21st century. At ISF, when we speak of excellence in our Vision Statement, we are aiming at nurturing the skills, values and mindset necessary for our graduates to be leaders of diverse fields of endeavor in their lives.

Accordingly, at the commencement of this new strategic planning phase, the focus for ISF's governing bodies – the Foundation, Academy, Pre-School, BELL, and CK STEM – will be to study the future of work and distil the requisite skills, attitudes, and knowledge expected of young people who aspire to rise to the top of their chosen fields. We must also build-in sufficient flexibility and agility in this process to equip our graduates with the capacity to switch fields and careers as the nature of work evolves under the influence of increasingly disruptive technologies, social trends, and other transformative phenomena, such as the recent global pandemic.

The future of work is not static or predictable. It will respond to dynamic forces, some of which are not visible at this time. It will be driven by need and opportunity. It will reward those with vision, expertise, endeavor, talent, effort, and adaptability. According to the World Economic Forum 'Future of Jobs' report (2023), the forces driving job creation and destruction will derive from environmental, technological, and economic sources. The most important skills for workers will be analytical and creative thinking (<https://www.weforum.org/publications/the-future-of-jobs-report-2023/>).

A key part of this initiative focusing on the future of work will be to provide opportunities for our students to obtain micro-credentials that will be recognized and valued by future employers. Micro-credentialing offers the potential to respond to rapidly evolving situations in a way that more cumbersome traditional forms of education, such as four-year degree programs, cannot. For example, in many technical fields, knowledge imparted in the first year of a degree program is already obsolete by graduation.

A deeper analysis of the future of work will inform us on how to best prepare our students through the various academic and experiential programs offered throughout their 15-year educational journey at ISF. Under the governance of the Foundation, learning programs offered by The ISF Academy, The ISF Pre-School, *Shuyuan*, BELL, *Hao Xue* and Li Ren will undergo sustained scrutiny as we examine and evaluate the relevance, applicability, and suitability of programs to ensure mastery of content, development of character, and inculcation of culture are deeply embedded in the curriculum at all levels.



8. Key Performance Indicators: at a glance



9. The ISF Risk Universe

The identification and management of institutional risk is a key factor underlying the successful implementation of this strategic plan. Close observation and analysis of the socio-political-economic landscape in which ISF entities operate is an ongoing function of both governance and management. The process of risk identification and management at ISF is known as the Enterprise Risk Management System (ERMS) and is handled at both senior management and board levels. This process is overseen by the Audit Committee (AC) of the ISF Board of Governors and the AC provides the Board with regular reports on risk management. Key risks are identified through ERMS and risk managers are assigned from the ranks of the Leadership Group to monitor and report on any changes to the 'risk universe' (see below).



RISK LEVEL	DESCRIPTION	NUMBER OF RISKS
High	Measures should be applied	7
Medium	Actions to be considered	8
Low	Risk should continue to be monitored	10
TOTAL		25

LEGEND	
	Top Risk Areas
	Other Risk Areas

Key identified institutional risks are as follows:

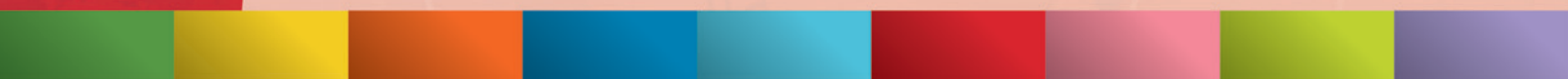
- Changing government policies
- Recruitment and retention
- IT and cyber threats

The following table provides an updated description of key risks at the time of publication of the 2024-29 Strategic Plan.

Risk	Risk Quadrant	Rating	Strategy
Changing government policies	Compliance	High	<ul style="list-style-type: none"> • Timely assessment and response to policy changes • Increase awareness through information and knowledge sharing • Highlight relevant information at staff induction and orientation sessions • Commitment to continuous professional development
Recruitment and retention	Strategic	High	<ul style="list-style-type: none"> • Leverage on international recruitment strategies and latest market surveys to attract top global talent • Enhance staff morale through team building and networking activities • Formulate succession plan for senior management • Comprehensive employee assistance program
IT and cyber threats	Operational	High	<ul style="list-style-type: none"> • Rigorous and effective security monitoring system and network segmentation • Effective email filtering solutions to detect and block phishing emails, malicious attachments and links • Update antivirus and anti-malware software on all endpoints • Provide IT and cybersecurity training to staff



APPENDICES



Appendix 1: ISF Learning: Guiding Statements

1. 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.

2. ISF Mission

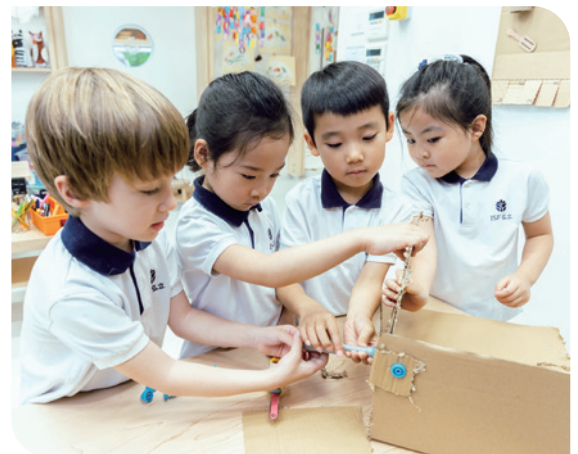
The ISF mission promotes education to foster:

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

3. The ISF Learner

Informed by the Vision and Mission statements, learning at ISF is founded on an interlinked set of fundamental beliefs about the learner and learning.

The foundation of ISF learning in its most effective form is learner **wellbeing**. The connection between wellbeing and learning is enshrined in the guiding principles of: 健康向學 'Wellbeing for Learning'. These principles are detailed in Appendix 1 section 8.



The learner is at the center of ISF learning. The ISF learner embodies the three shared dimensions of the universal human experience of *being, knowing, and doing*. Learners as individuals comprise three dimensions: *body (physical), mind (intellectual), and spirit (emotional)*; ISF learners collectively are members of a *family, a school, and the community*.



4. ISF Core Values: The *Eight Virtues + One*

As a social enterprise deeply embedded in its physical, historical, cultural, and environmental setting, ISF learning is informed at all levels by its values system: **The *Eight Virtues + One***. Interpreted and adapted for use in the modern world, The *Eight Virtues + One* serve as the guiding principles and ideals that inform and underpin all aspects of an ISF education. They describe the way in which we work together as a community: they are the 'how' to the 'what' of the Mission (actions) and the 'where' of the Vision statement (direction).



The *Eight Virtues + One* apply equally to all members of the ISF community; all are expected to strive to embody and reflect these ideals.

The *Eight Virtues + One*



The *Eight Virtues + One*, have a long and culturally rich journey in the pages of Chinese history. First codified as the Four Thoughts and Eight Virtues (or the *Four Cardinal Principles and the Eight Virtues*), these guiding principles date from the Spring and Autumn period (春秋時代 770BC-476BC). It was at this time that Guan Zhong (管仲) first identified the four social bonds 禮、義、廉、耻 as propriety, justice, integrity, and honor. They are heavily influenced by Confucian thought. The Eight Virtues have remained a consistent presence in the canon of virtue throughout Chinese history. During the early years of the Republic of China, Dr. Sun Yat-sen invoked these concepts in his sixth lecture concerning the Three Principles of Democracy. These principles continue to resonate in the world of Greater China in the 21st century.

[sources: The *Four Cardinal Principles and Eight Virtues*, [https://zh.wikipedia.org/wiki/ 四维八德](https://zh.wikipedia.org/wiki/四维八德) . Sun Yat-sen, Sixth Lecture, 2 March 1924 National Morale and World tranquillity, https://sunyatsenfoundation.org/wpcore/wp-content/uploads/San-Min-Chu-I_FINAL-3-Principles.pdf, pp.45-50).

In practical terms, a contemporary experiential and cultural lens is applied to each virtue to provide practical guidance for behaviors, attitudes, and choices.

All members of The ISF community respect and embody The *Eight Virtues + One*, showing this in the following ways:

Zhong 忠

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.

竭盡全力對承諾的每一件事都認真負責。忠於他人和自己，全心全意努力實現「弘立」的理想。

Xiao 孝

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.

力行尊敬與尊重。孝順父母，尊敬師長，尊重文化傳統，注入新的創意，繼往開來。

Ren 仁

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

有同理心，會敞開心懷，不計得失的接納並幫助他人。關愛我們共同生存的地球、和平和人類未來。

Ai 愛

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

熱愛學習，熱愛生命，對世界充滿好奇。追求大愛，犧牲小我，成就大我。

Li 禮

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".

對他人以禮相待，尊重他人，自我約束，三思而後行。體現「君子淑女」的教養並遵守傳統文化的規範。

Yi 義

I am principled, pursue justice, and stand up for my beliefs. I am confident and take risks. I am trustworthy.
講求原則、堅持公義，勇敢捍衛自己的信念。有自信並可承擔他人的信任與托付。

He 和

I value and pursue harmony with others. I am appreciative of my immersion in a multicultural world.
重視並追求與他人的和諧，並以歡欣的心接受多元文化的洗禮。

Ping 平

I pursue balance and maintain a healthy mind and body. All people are equal and treated fairly.
追求平衡發展，保持身心健康。堅持公平原則，人人享有平等。

Zhi 智

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 good choices in our life's journey.

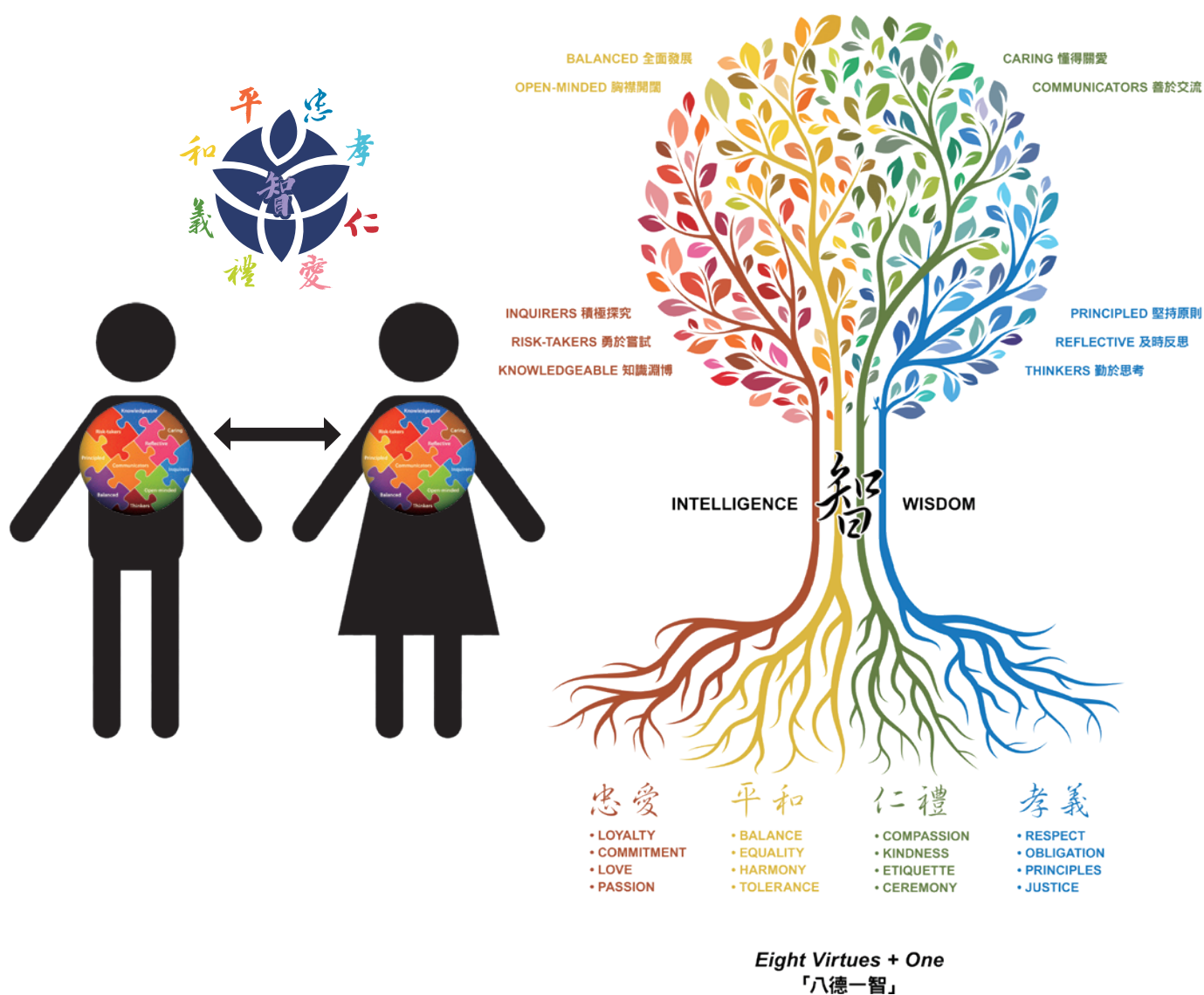
「八德」是「弘立人」生活的準則，聰明與智慧建立在「八德」的基礎上，指引我們在人生的道路上做出正確的判斷和抉擇。



5. The Eight Virtues + One and the IB Learner Profile

As an IB World School, learning at ISF is also expected to reflect the values and ideals of the International Baccalaureate, most succinctly expressed in the form of the IB Learner Profile. The IB Learner Profile consists of 10 attributes that describe the ideal learner: *balanced, caring, communicator, inquirer, knowledgeable, open-minded, principled, reflective, risk-taker, thinker*. There is a close relationship between The *Eight Virtues + One* and the IB Learner Profile. The *Eight Virtues + One* informs the collective, shared experience of the ISF learning community ('we'), focusing on the social and cultural bonds that connects the different stakeholders together. The IB Learner Profile reflects the individual experience of learning within the ISF community ('me'). The illustration depicts this dual relationship, highlighting the shared, common foundations of the ISF community, from which the individualized expressions of character, intelligence, and personality grow within each learner.

The IB Learner Profile
國際文憑學習者培養目標



6. An ISF Definition of Learning

ISF learning is informed by the principles embedded in the ISF Vision, Mission, and Values statements. With **learner wellbeing** as an essential enabler, 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.



7. An ISF Definition of Global Stewardship

All members of the ISF community are a part of a shared global fellowship of humanity. The ISF Vision statement includes the fundamental principle of ISF learners being global in understanding and experience. The ISF Mission seeks to promote education that inspires learners to act as empowered **global stewards**.

The ISF Academy and The ISF Pre-School use **Global Stewardship** in place of Global Citizenship in their guiding statements. Stewardship implies caretaking without ownership; our responsibility to care for the world is temporary in nature. We are obligated to ensure that our world is in optimal condition when it is inherited by the next generation of **Global Stewards**.

A definition of Global Stewardship for The ISF Academy and The ISF Pre-School reflects the three principal domains of human experience, as illustrated in the description of the ISF Learner: **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).

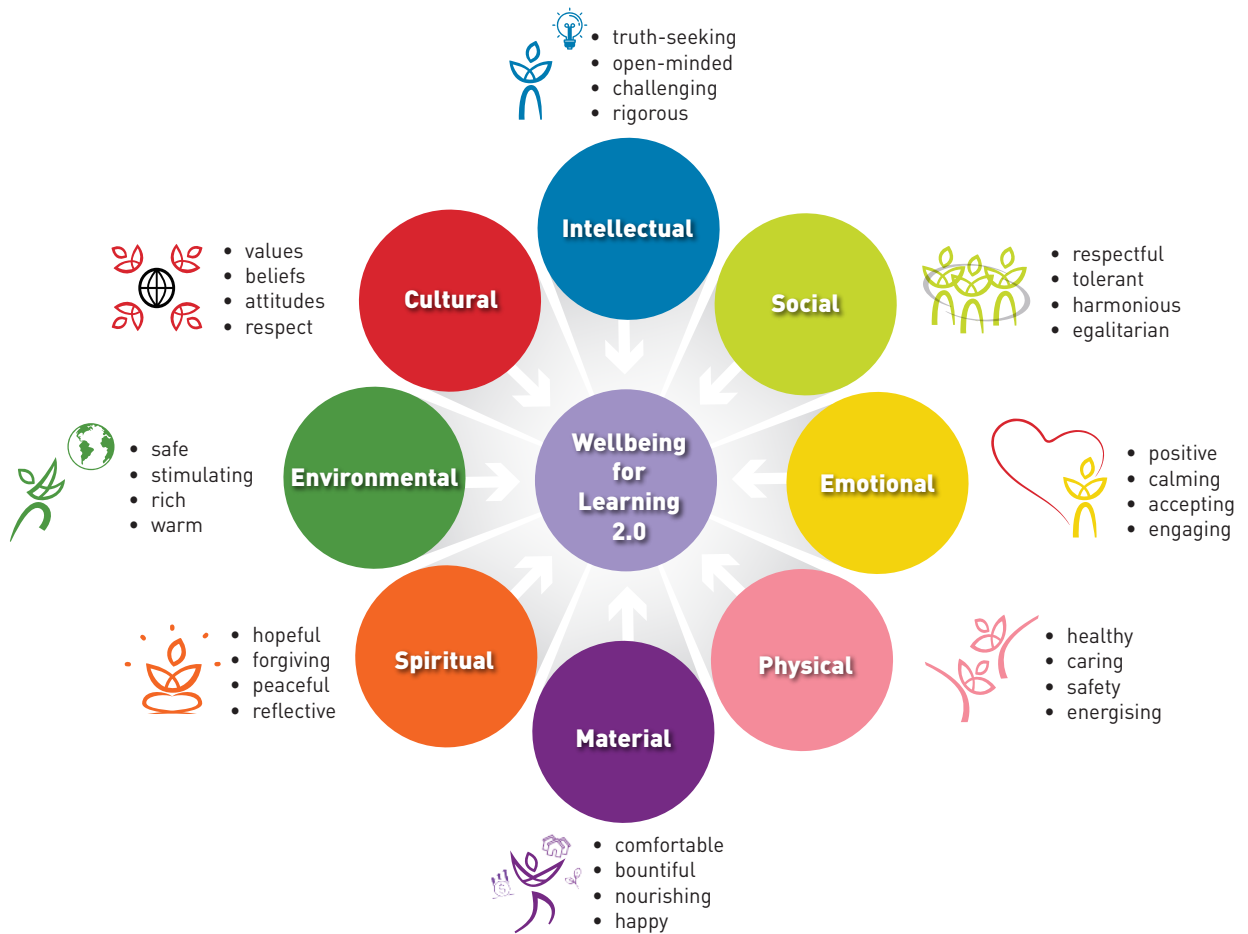
In practice, a global steward is an individual and an independent learner, who takes personal responsibility for her/his actions. Thus, at an individual level, the IB Learner Profile (balanced, caring, communicators, inquirers, knowledgeable, open-minded, principled, reflective, risk-takers, and thinkers) reflects the idealized learner. A global steward must be a learner in order to grow: deep in thought and understanding and wise in attitudes and action. A global steward, at the same time, seeks to be a wise and virtuous member of a larger, wider, and highly diverse commonwealth of humanity, collectively responsible for concerted, coordinated, and harmonious participation in corporate action for the benefit of a better and more peaceful world.

In summary, the global steward:

- Acts as an independent thinker and a deeply connected member of an integrated global community;
- Makes meaning and acquires wisdom experientially;
- Acts with foresight in the present to protect the future, but with an abiding respect for the past;
- Employs imagination and creativity to solve problems;
- Sees with clarity what is, and what with faith, creativity, and commitment, might be; and
- Values the richness and complexity of cultural and biological diversity, recognizing that these are the building blocks of a better world.

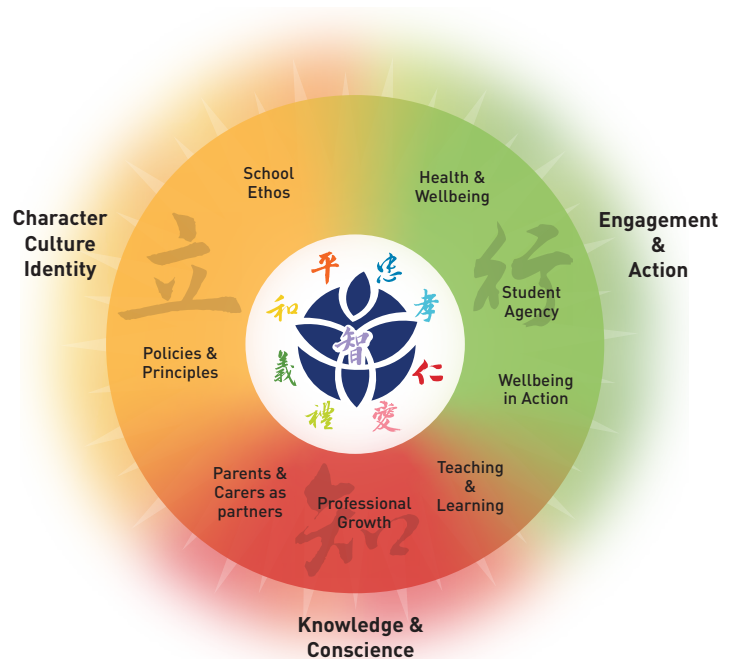
8. Wellbeing for Learning 2.0

Building on the definition of the ISF learner (depicted above), ISF has also mapped the parameters of wellbeing in the following terms:

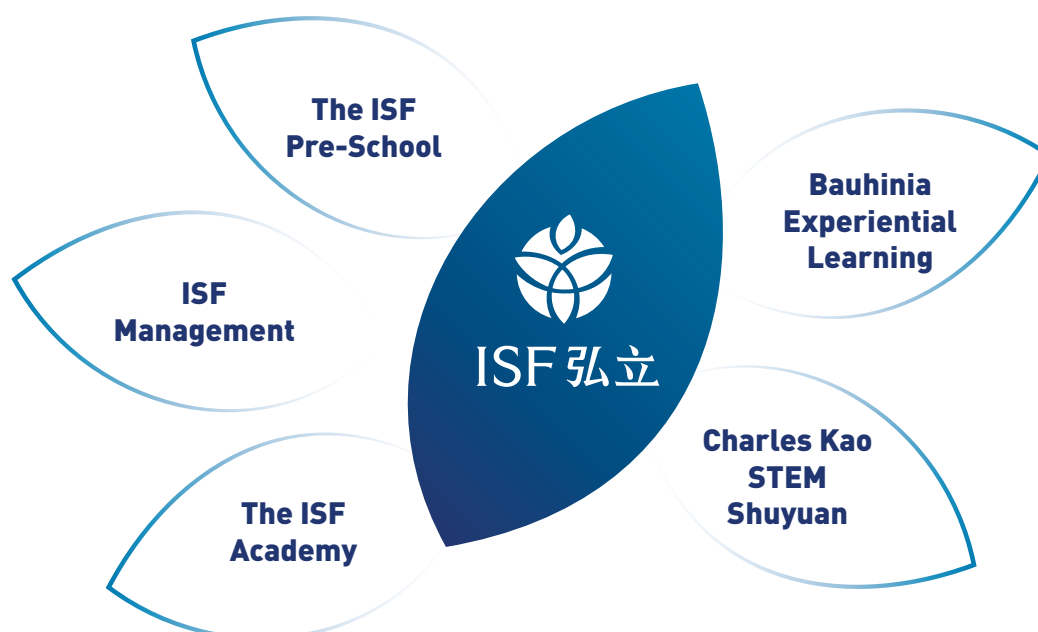


In the new strategic plan, wellbeing is to be embedded in ISF culture and ethos. However, wellbeing is not a discrete or static construct: it is dynamic and multi-dimensional, requiring a whole-school and holistic approach to be effective. It is the responsibility of leadership at all levels to ensure it is planned, practiced, and reviewed as an ongoing and core element of all ISF activity. As shown above, wellbeing is reliant on relationships. In practice, wellbeing is promoted and realized through concrete action.

The implementation of wellbeing at ISF is overseen by the Wellbeing Committee, which serves to promote and protect the wellbeing of all learners at ISF.



Appendix 2: The ISF Group Structure



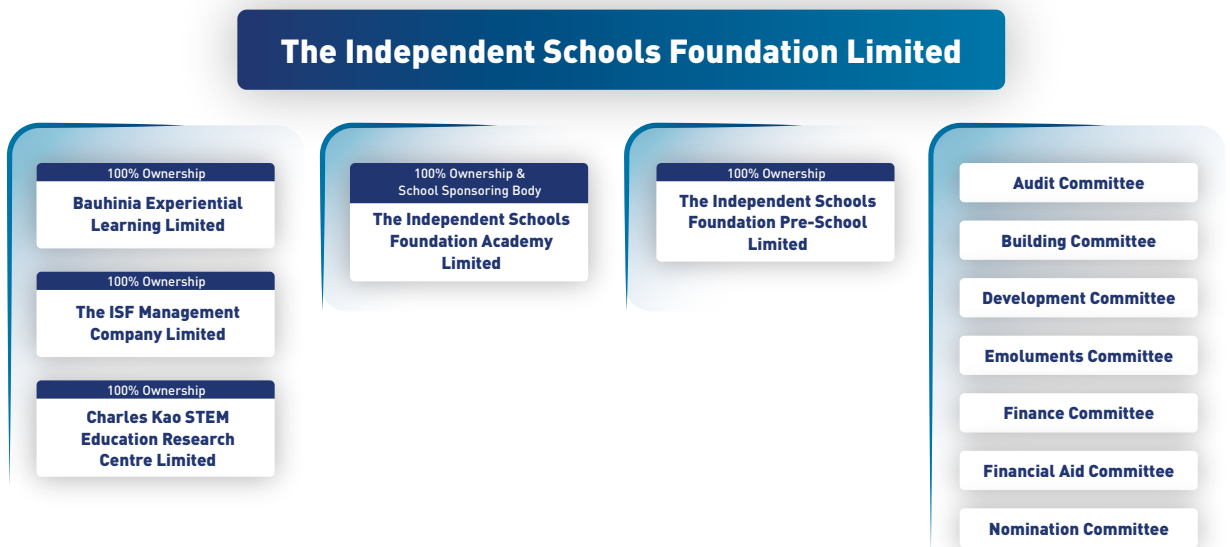
1. ISF Structure and Governance

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. All ISF five operating entities in the ISF group are not-for-profit institutions:

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 Pre-School operates as a registered kindergarten, currently located in Belcher's Street, Kennedy Town, Hong Kong. The Pre-School is governed by the Pre-School Board of Governors.

4. **Bauhinia Experiential Learning Limited** (BELL): a not-for-profit company limited by guarantee, BELL serves to provide programs, courses, activities, and services pertaining to experiential learning, Chinese creativity and culture, and other co-curricular activities to enhance wellbeing, virtues, life skills, character, and leadership; BELL is governed by the BELL Board of Governors.
5. **CK STEM** (*Shuyuan*): a not-for-profit company limited by guarantee, CK STEM is the preferred vehicle of innovation and experimentation in STEM and related academic disciplines at ISF. The company is responsible for projects such as the AI Laboratory and the Molecular Biology Laboratory 2.0. CK STEM is governed by its Board of Directors.

ISF Governance Structure



2. Other ISF Partner Organization



ISF Academy PTA



弘立校友會
ISF Alumni

The ISF Academy Alumni Association



Appendix 3: ISF Key Stakeholders

The ISF is a community of learners comprised of different stakeholders. These nine key stakeholders are all essential participants in the ISF mission. Each group of stakeholders offers its own distinct contribution to ISF; and each group similarly has a set of distinct needs and expectations.

The nine key stakeholders are:

- Students** (all ISF students, both present and future);
- Parents** (all parents of ISF students, past, present, and future, including the Parent Teacher Association);
- Foundation and governing bodies** (the Foundation, members of governing boards, and Board advisory committees of ISF companies);
- Management, faculty, and staff** (employees of all ISF group companies);
- Alumni** (all past students who are members or associate members of the Alumni Association);
- Hong Kong Government** (regulator of the Academy and Pre-School through EDB);
- Key Suppliers** (services, utilities, resources, curriculum, authorisation, accreditation, banks, etc.);
- Tertiary Education Institutions** (post-graduation destinations for ISF students); and
- The Hong Kong Community** (the citizens and residents of Hong Kong).

At a strategic level, ISF must remain engaged with each of these key stakeholder groups.

The diagram below illustrates the specific expectations and needs of each stakeholder group.



Appendix 4: ISF Historical Milestones

2003



First temporary campus in Wan Chai

2005



School representatives officiated at the Groundbreaking Ceremony at the Pokfulam campus

2008



Commencement of the Foundation Year Program



The ISF community celebrated the Grand Opening of the Pokfulam campus



Celebration of the 5th Anniversary of The ISF Academy

2010



Authorization of the IB Diploma Programme



Extension of R Block to R5 & R6

2011



Completion ceremony of G Block

2013



The ISF Academy purchased an original artwork titled "Man & the Whale", painted by Sir Charles Kao



The ISF community celebrated the 10th Anniversary of The ISF Academy on Jam day

2006



The Academy expanded to a second temporary campus in Causeway Bay

2007



Topping Out Ceremony of the Academy's new permanent campus in Cyberport



The Academy moved to its permanent home with the completion of R, Y and B Block

2009



Authorization of the IB Middle Years Programme



Celebration of the Academy's key founder, Sir Charles Kao, winning the Nobel Prize in Physics. He was honored as the "Father of Fiber Optics"

2012



Graduation of the first cohort of Grade 12 students



The first cohort of Grade 10 students awarded the IB MYP Certificate



Launch of Shuyuan Program

2013



Extension of B Block to B6 & B7 and the opening of The Clifford C. F. Wong Primary Library

2014



Awarded CIS / WASC Accreditation

2015



Establishment of ISF Pre-School in Sheung Wan

Appendix 4: ISF Historical Milestones

2016



Class of 2016 achieved outstanding IB results

2018



Completion of Pokfulam campus expansion with addition of A Block and C Block



Celebration of The 15th Anniversary of The ISF Academy

2019



Introduction of new branding and logo to unify all constituents of ISF



Introduction of new school uniforms for Pre-School, Primary and Secondary School

2020



The pivot of teaching and learning over the pandemic

2021



Introduction of The *Eight Virtues + One* logo



Celebration of the 10th Anniversary of The H.J. Zhang Black Box Theater

2022



The opening of the ISF Gallery along with the remodeling of 4 Primary classrooms

2023



The ISF Academy is the first school in China and the second in Asia to become an Association for Experiential Education (AEE) accredited institution

2018



Dedication of the biodiversity garden in C Block as the Shirley Lee Memorial Terrace



B2 Cluster Area named Vibrant Inspirations Student Center, dedicated to Dr. Christine Wong

2020



Relocation of Pre-School campus to Kennedy Town



The open playground won 3 interior design awards



2021



ISF Academy won silver under Best Education category at the prestigious A&D Awards for the interior design of Charles Kao Square

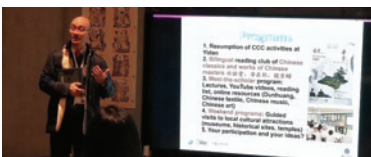


2022



Shuyuan Studio established

2023



The Chinese Research Center (CRC) was established



Completion of link bridge connecting R and C Block



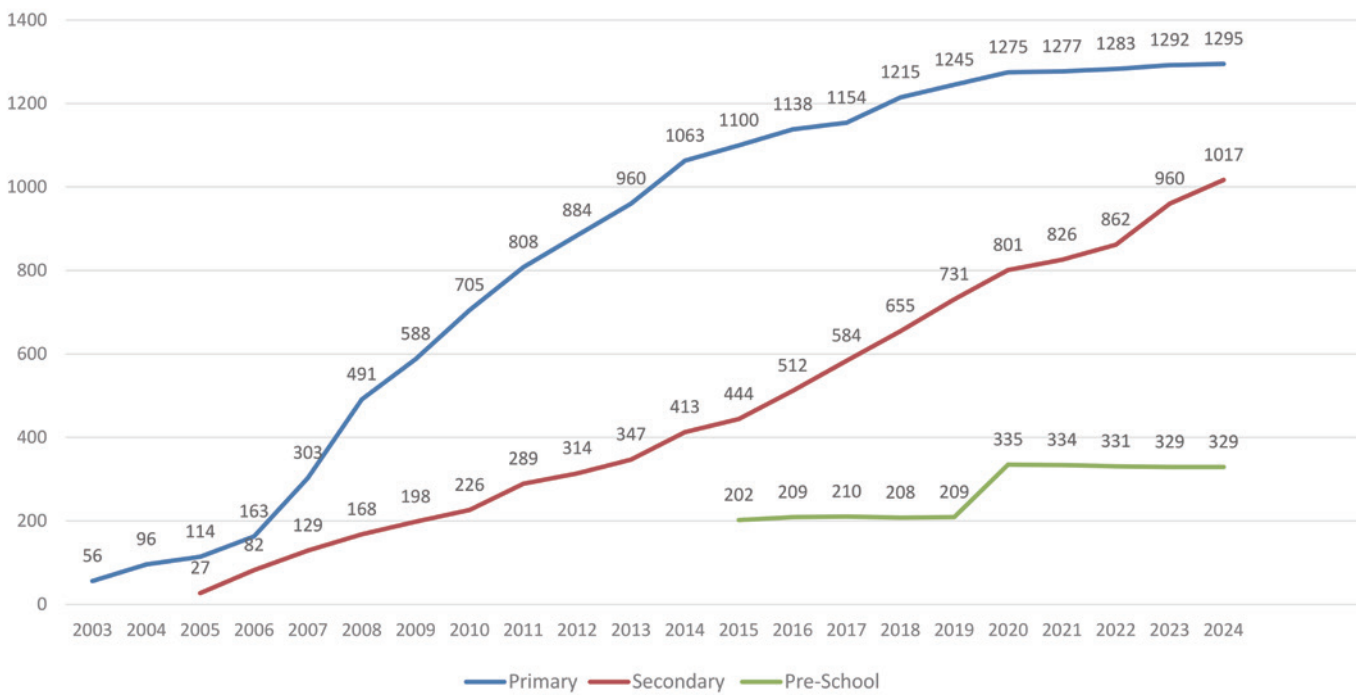
ISF Gallery design recognized for excellence in architecture by Hong Kong Institute of Architects

Appendix 4: ISF Historical Milestones



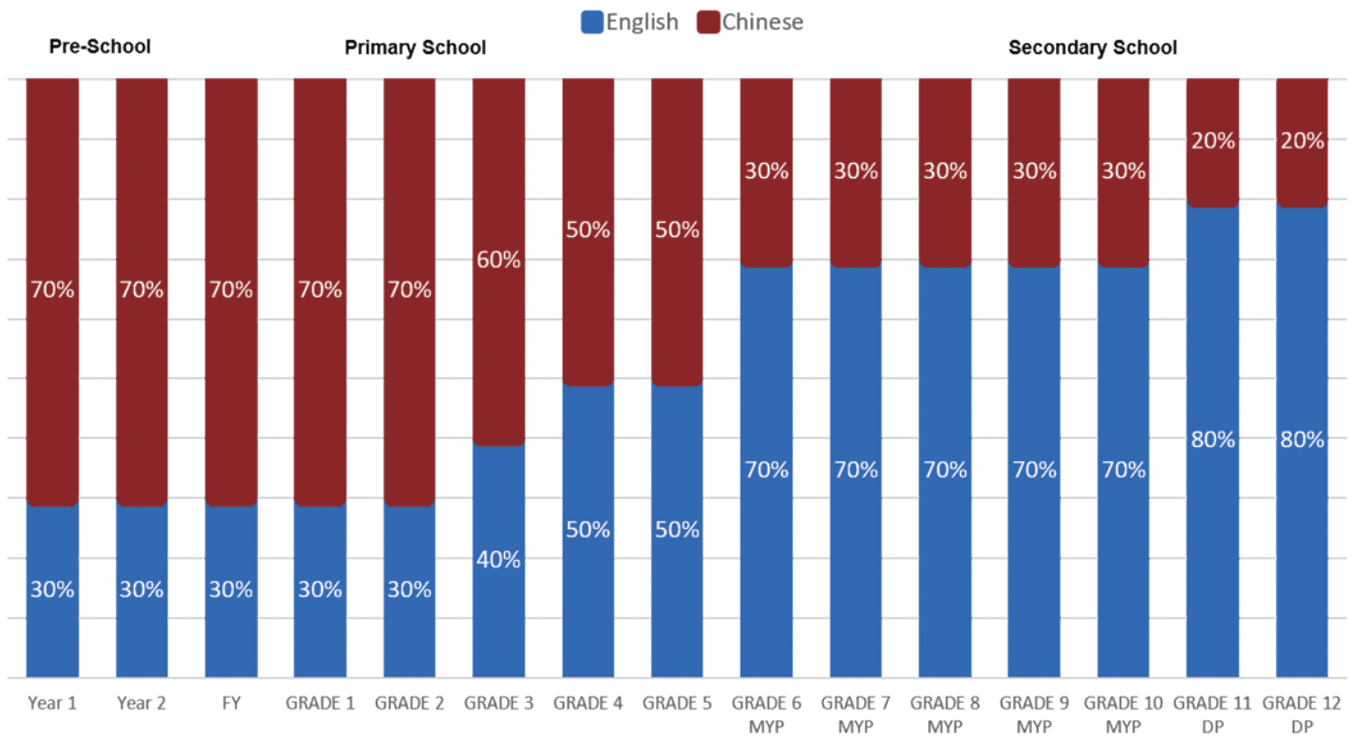
Appendix 5: Enrolment History

ISF Enrolments: 2003-2024



Appendix 6: Languages of Instruction

ISF Languages of Instruction



Appendix 7: 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 preparation for the construction of the new campus in Cyberport commencing in 2005, the Foundation received a deed of grant for the land on which the new school was to be built and at the same time entered into a ten-year service agreement with the Hong Kong Government. The Service Agreement set out the standards of service expected of the school operating on the site provided by the Hong Kong Government. The Service Agreement was renewed in 2015 and again in 2020.

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, adding a preparatory or transition year for young learners entering ISF from kindergarten, prior to commencing their intensive bilingual studies in 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). Re-accreditation was awarded in 2020.

In 2015, the Foundation established The ISF Pre-School to offer a program of bilingual kindergarten education. Originally based in Sheung Wan, the ISF Pre-School moved to purpose-built facilities in Kennedy Town in 2020. In 2024, The ISF Pre-School has an enrolment of 330 students across the two year levels and the half-day and extended programs. It offers an adapted version of the International Early Years Curriculum. Approximately 95% of the 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 elements of the ISF community. With a membership well in excess of 1,000 and operating under 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.

In 2023, ISF was accredited by the Association for Experiential Education in recognition of its management of co-curricular and experiential education programs.

Appendix 8: ISF Symbols and Logos



The ISF Logo



Shuyuan Logo



The ISF Mascot: The Qilin



Li Ren Logo



BELL Logo



The *Eight Virtues + One* symbol

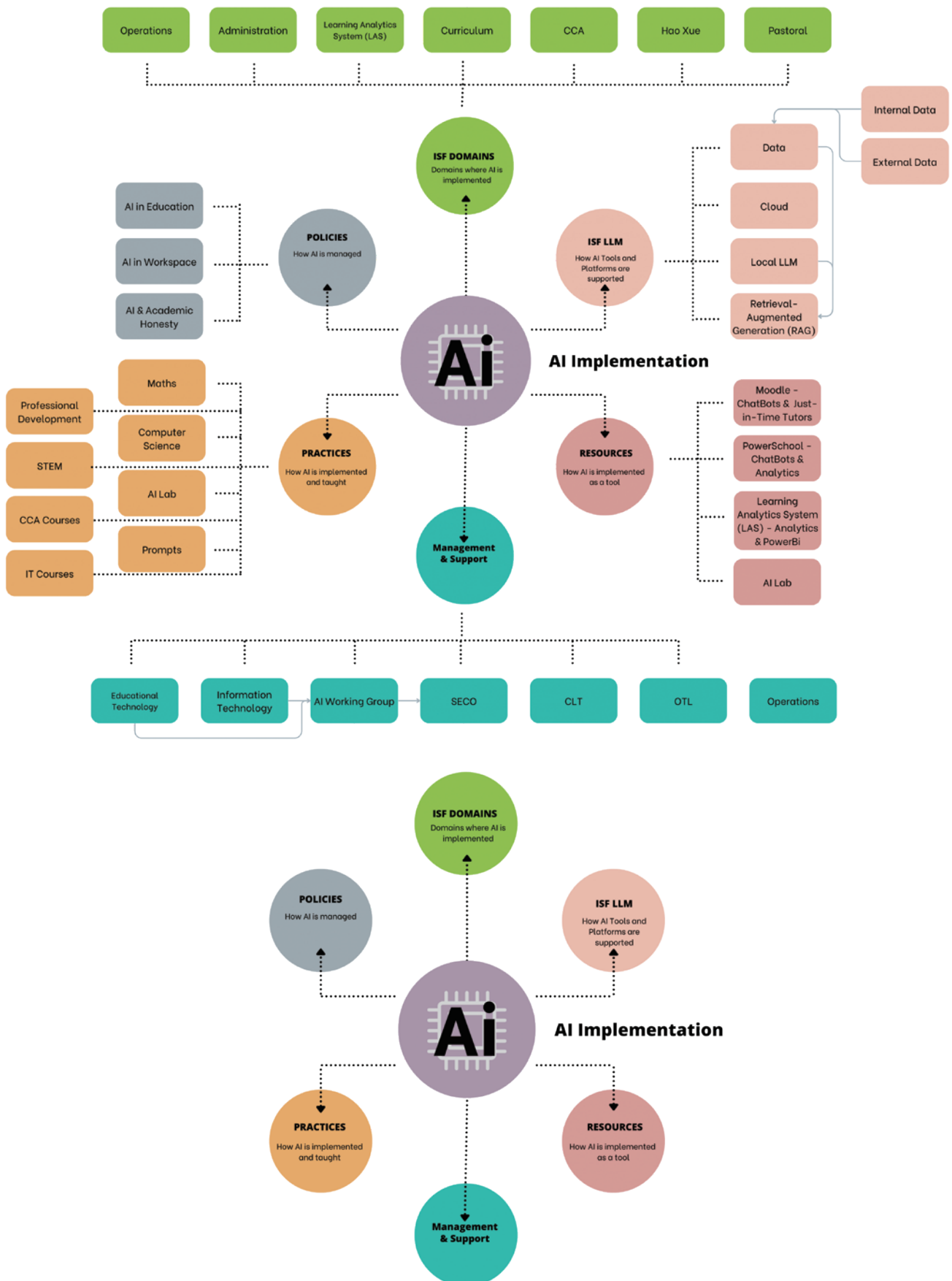
Appendix 9: Key Performance Indicators: 2018-23

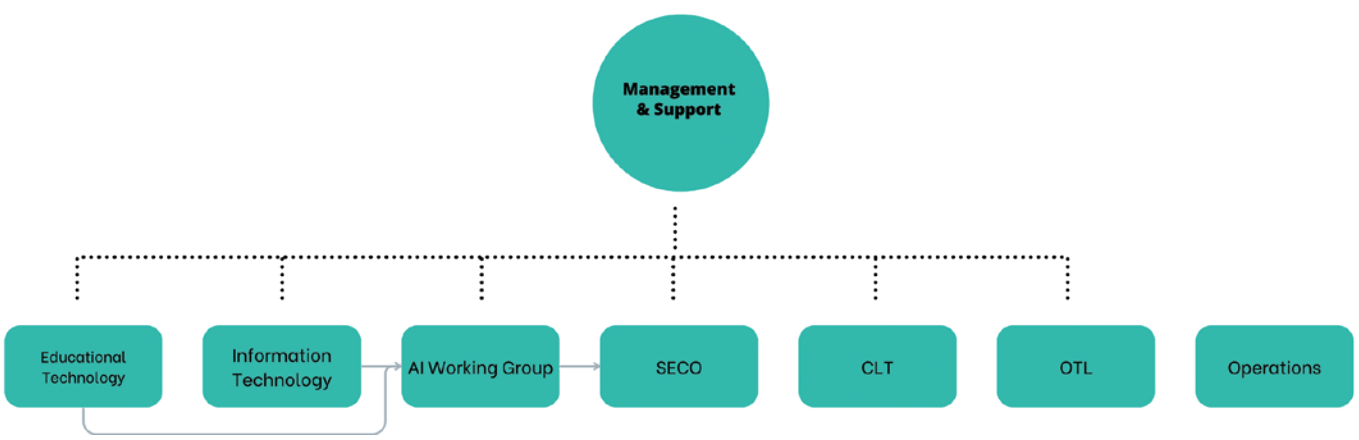
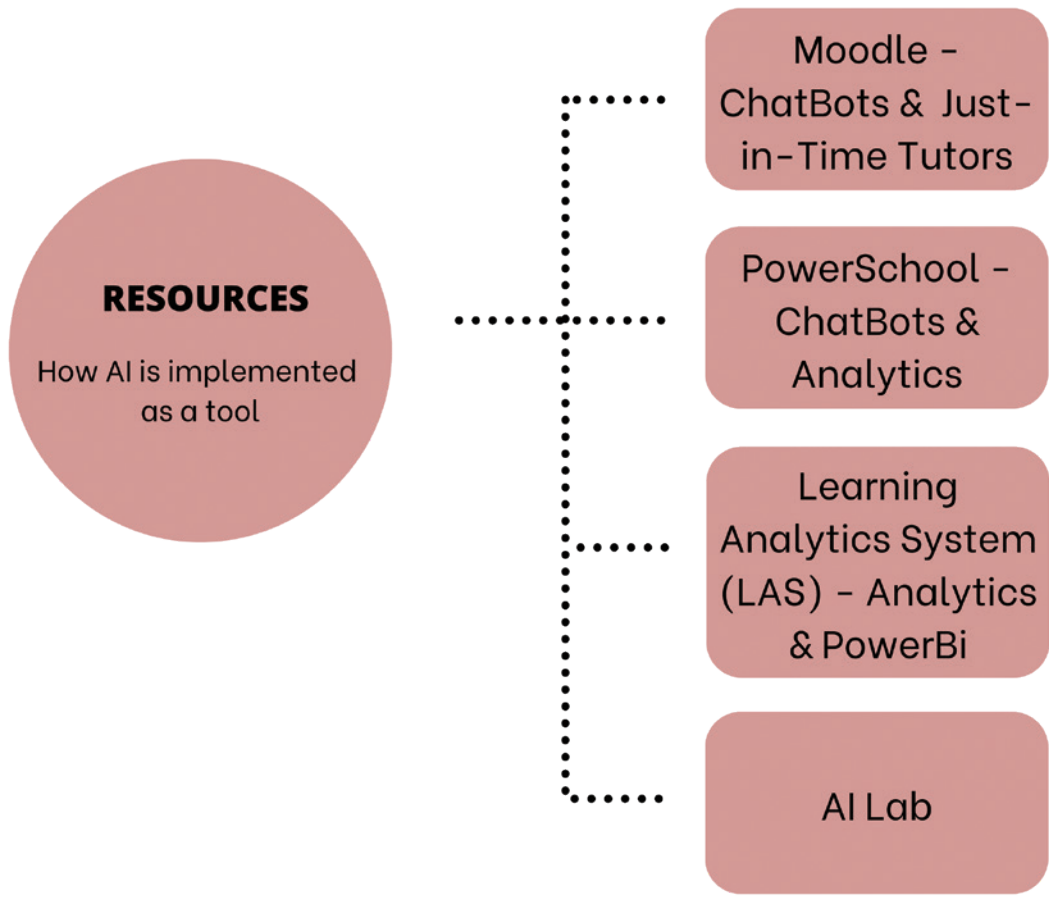
KPI Domain	Performance Indicator	Target Year	Performance Target	Definitions	Performance Outcome
Enrolments	enrolment total	2023	1,800 (minimum number)	EDB target enrolment for school set in 2020-25 Service Agreement	2018-19: 1867 (104% - 1,800 minimum) 2019-20: 1946 (108%) 2020-21: 2036 (113%) 2021-22: 2057 (114%) 2022-23: 2145 (119%) 2023-24: 2249 (125%)
	Student retention	Annual	90%	averaged across all grades	2018-19: 94.3% 2019-20: 92.5% 2020-21: 90.2% 2021-22: 90.9% 2022-23: 92.7%
	Diploma Programme (DP) enrolments	2023	100+ students in DP 2 class	steady state enrolment of students in Grade 12	2018-19: 51/46 (Grade 11 / 12) 2019-20: 60/50 2020-21: 60/60 2021-22: 70/60 2022-23: 85/68 2023-24: 106/84
	enrolment gender balance	Annual	50% balanced enrolment	tolerance of variance not to exceed 2% of total enrolment across each division	Overall gender balance across grade levels within 49-51% tolerance band
	Hong Kong Permanent Residents (HKPR)	Annual	in excess of 70% HKPR enrolments	number of students who are Hong Kong citizens or permanent residents	2018-19: 85% 2019-20: 86% 2020-21: 88% 2021-22: 88% 2022-23: 89% 2023-24: 88%
Financials	Tuition fee increases	Annual	no greater than CPI & approved by EDB	defined as educational CPI incorporating the cost of hiring teachers in a global market with HK\$ pegged to US\$	2018-19: 6.5% 2019-20: 4.75% 2020-21: 0% 2021-22: 3.4% 2022-23: 3.4% 2023-24: 4.5%
	Fundraising target	2023	HK\$500 million	Funds raised through Inspire campaign	HK\$516 million raised by 31 July 2023
	Financial aid and scholarships	Annual	greater than 10% of budget each year	Service Agreement condition stipulated by Education Bureau	2018-23: 10% allocated annually Scholarships: 2018: 47 (7.2%) 2019: 62 (8.5%) 2020: 65 (8.1%) 2021: 77 (9.3%) 2022: 97 (11.2%) 2023: 102 (10.6%)

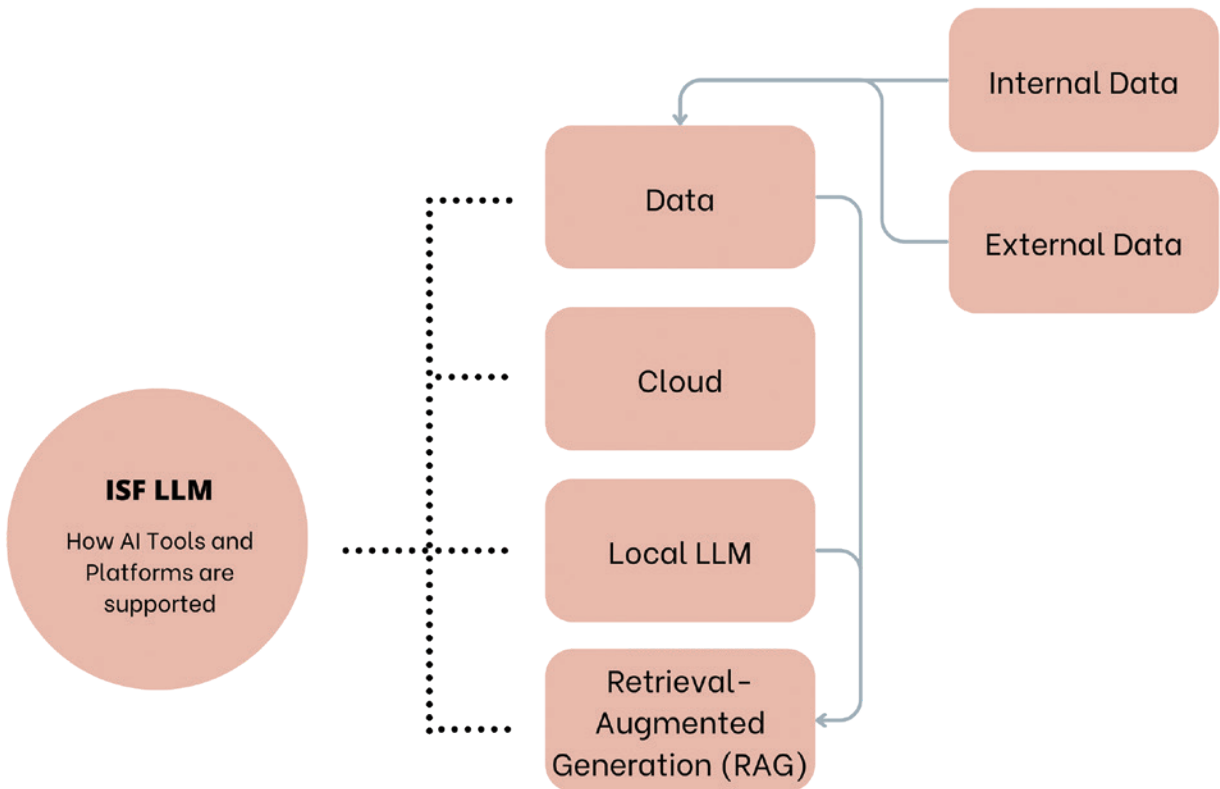
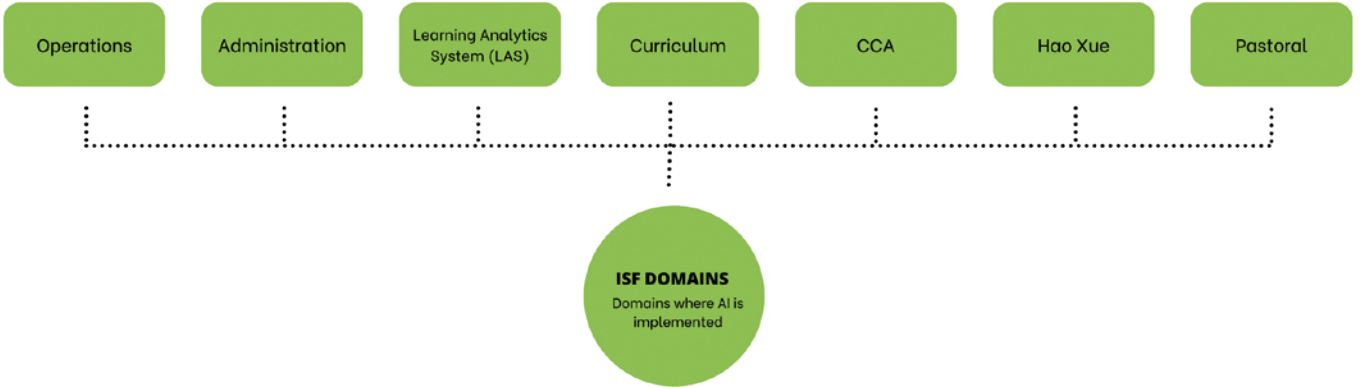
	Phase III fully funded	2023	Funds available for construction of Phase III	Facilities funded and constructed to plan	Swimming pool, auditorium, accommodation, and Shuyuan facilities all completed by 2018 Gallery Project (2021-23) completed; fully funded by Academy and Foundation: \$170.9 million
	Budget break-even after depreciation	2018-23	break even across all divisions and sections after depreciation	audited accounts to indicate no loss (1% tolerance)	2018-19: HK\$0.3 million deficit (0.06% of revenue) 2019-20: HK\$0.2 million deficit (0.03% of revenue) 2020-21: HK\$2.4 million deficit (0.48% of revenue) 2021-22: HK\$1.5 million deficit (0.27% of revenue) 2022-23: HK\$0.3 million deficit (0.05% of revenue)
Teachers	Retention of teaching staff	Annual	90% faculty retention	less than 10% of faculty elect to leave ISF	2018: 92% 2019: 93% 2020: 93% 2021: 93.75% 2022: 91% 2023: 97%
	Master teachers	Annual	10% master teachers	At least 10% of faculty appointed to master teacher positions	2019: 11.3% 2020: 13.1% 2021: 8.9% 2022: 10.1% 2023: 8.5%
	Teacher Qualifications	Annual	66% higher degrees	At least 66% of teaching faculty hold master's degrees or higher	2019: 76.1% 2020: 77.3% 2021: 74.6% 2022: 73.9% 2023: 71.3%
Students	Shuyuan participation	Annual	Maximize	Students participating in elective or invitational Shuyuan programs	2018-19: 353 2019-20: 463 2020-21: 623 2021-22: 724 2022-23: 903 2023-24: 917
	1st choice college at graduation	Annual	90% graduates offered place at first choice college	Defined by applications and nominated first choice institution	2020: 82% 2021: 97% 2022: 98% 2023: 94%

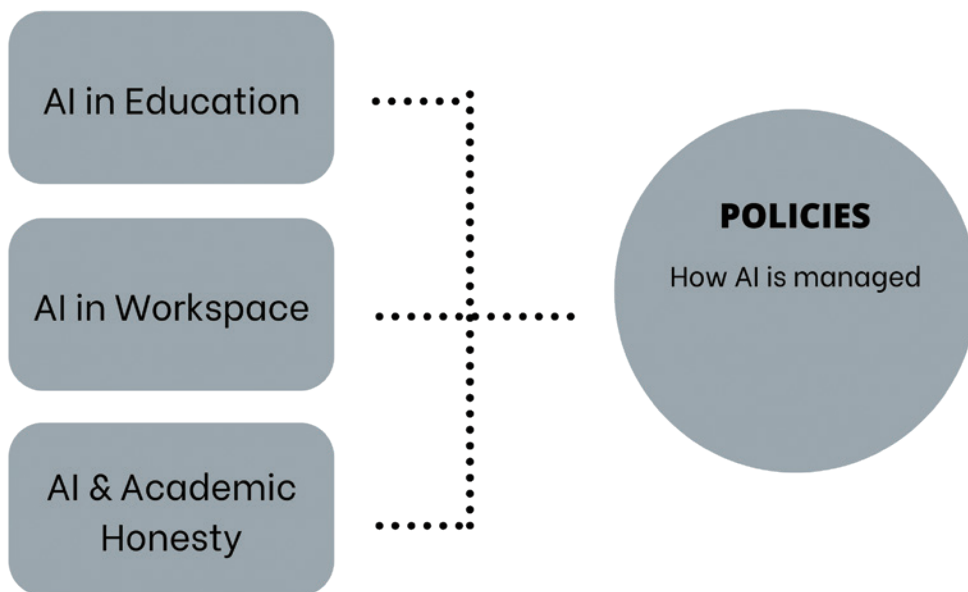
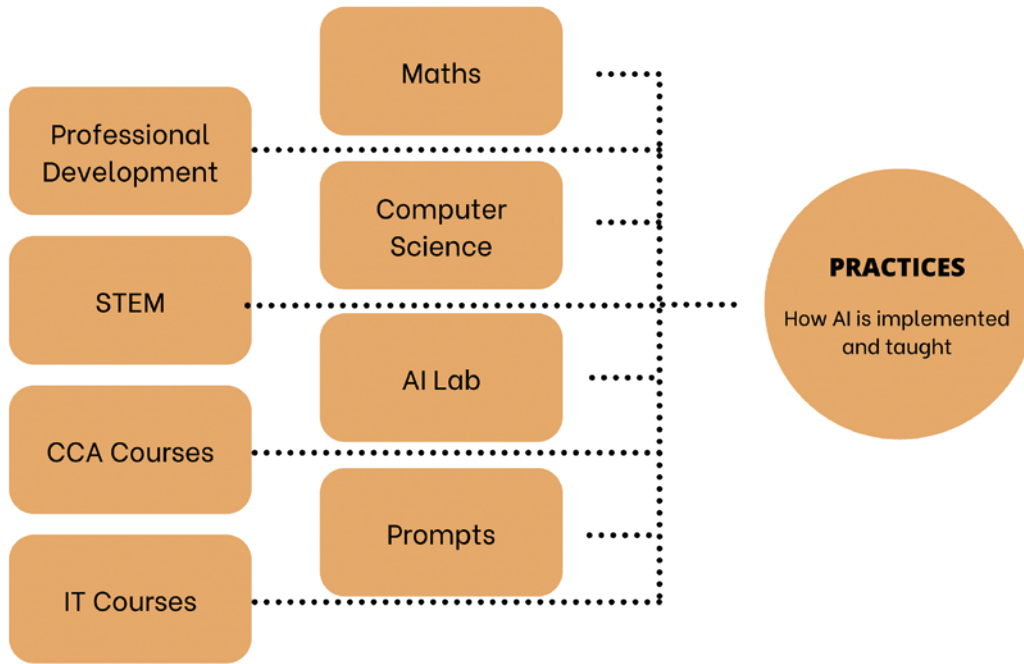
	Participation in ELPs	Annual	100% participation in ELPs	% of eligible students participating in ELPs annually	ELP1 2018-19: 99.29% 2019-20: 97.89% 2020-21: n/a (COVID) 2021-22: 96.95% 2022-23: 92.66% Average participation: 96.70% ELP 2 2018-19: 98.37% 2019-20: n/a (COVID) 2020-21: n/a (COVID) 2021-22: 98.22% 2022-23: 94.81% Average participation: 97.1%
	Students participating in CCAs	Annual	100% of eligible students participating in CCAs	CCA participation rates averaged per session (two sessions per year)	2018: 4397 2019: 4912 2020: 3357 (COVID) 2021: 2696 (COVID) 2022: 3368 (COVID) 2023: 4844
	Wellbeing index	Annual	Acceptable measure of student wellbeing	Measured through support services provided to students	2018-19: 228 2019-20: 205 2020-21: 189 2021-22: 237 2022-23: 141* 2023-24: 97
Academics	Class sizes	Annual	no more than 20 per class	Primary School	all Primary School class sizes at 21 or below
	Class sizes	Annual	no more than 22 per class	Secondary School – Middle School	all Secondary School classes at or below 22
	IB Middle Years Programme	2018-23	all Grade 10 students to achieve certification	award of MYP Certificate by IB	Students achieved MYP certification: 2018: 100% 2019: 100% 2020: N/A - COVID 2021: 99% 2022: 100% 2023: 98%
	Double Language-A (English & Chinese)	Annual	80% of Grade 10 students achieve Double Language-A standard	Benchmark determined by MYP standards reached in Grade 10	2018: 72% 2019: 71% 2020: 76% 2021: 76% 2022: 78% 2023: 72% Overall average: 74.1%
	IB Diploma Programme	2018-23	all Grade 12 students to achieve IB Diploma	Award of Diploma by IB	100% of students awarded IB Diploma in 2018-2023
Accreditation	CIS Accreditation & Reaccreditation	2018-23	Re-accreditation awarded by CIS/WASC in 2020	CIS/WASC Accreditation achieved	CIS/WASC Preparatory Evaluation successfully completed in April 2023
Facilities Development	construction of Phase III	2018	completed	no additional financial burden placed on parents for capital works	Phase III completed in July 2018 Gallery completed by 2023

Appendix 10: ISF AI Project Mapping









AI STRATEGIC 5-YEAR PLAN

MANAGEMENT & SUPPORT	RESOURCES	ISF AI	ISF DOMAINS	POLICIES	PRACTICES
<ul style="list-style-type: none"> • Governance • SECO • AI Working Group <ul style="list-style-type: none"> ◦ Information Technology ◦ Educational Technology • Curriculum Leadership Team (CLT) • Office of Teaching and Learning (OTL) • Operations 	<ul style="list-style-type: none"> • AI Lab • Learning Analytics System (LAS) • PowerSchool • Moodle • IT Support • Security • In-House Servers • Finance 	<ul style="list-style-type: none"> • Large Language Model (LLM) • Application Layer • Data • API Tokens • ChatBots • Just-in-Time Tutors 	<ul style="list-style-type: none"> • Curriculum • Operations • Administration • Learning Analytics System (LAS) • Li Ren • Pastoral 	<ul style="list-style-type: none"> • Hong Kong Education Bureau • International Baccalaureate • AI Responsible Use Policy • AI in Workspace • AI & Academic Honesty 	<ul style="list-style-type: none"> • AI Lab • Shuyuan Research • Professional Development • STEM • CCA Courses • IT Courses • Maths • Computer Science • Prompts