

# SOARING TO BRILLIANCE

## Three Year Education Plan



### The Phoenix Education Foundation 2026-2029

#### **Accountability Statement for the Education Plan**

*The Education Plan for Phoenix Education Foundation 0175 commencing 2026 was prepared under the direction of the operator and/or governing body in accordance with the responsibilities under the Independent Schools Regulation and the Ministerial Grants Regulation. This plan was developed in the context of the provincial government's business and fiscal plans. The operator and/or governing body has used its performance results to develop the plan and is committed to implementing the strategies contained within the plan to improve student learning and results.*

*The operator and/or governing body approved the Education Plan for 2026-2029 on May 28, 2026.*

*Tamara Becker  
Board Chair  
<Original Signed >*



## Foundation Statements

The Phoenix Education Foundation is a publicly accredited and funded non-profit independent school that is open to all learners K-12. We were started by Diana Stinn and Jill Mann in 2004. We chose the name “PHOENIX” because it was not only a rebirth for us but we felt we could create a space for students who were a little different than other typical learners and that Phoenix would provide a second chance or re-birth for them as well.

**Our mission statement is to provide unique learning opportunities for families so that each young person may develop into a life-long learner and an active, responsible global citizen.**

- We believe that **each child** has unique talents, skills, interests and learning styles and that their education should respect these key elements.
- We believe that **parents** are the primary educators of their children; therefore, a meaningful partnership with them is critical.
- We believe that the **support and guidance** of our caring, dedicated, qualified professionals will enhance the academic, physical, social, spiritual and emotional qualities of our students.

The **7 values** upon which the school was built are:

- **Community**
- **Kinship (Family)**
- **Experiential Learning**
- **Sassy (Light hearted fun)**
- **Life-Long Learning**
- **Frugal**
- **Nimble (Flexible)**

Proposed #	YE 2026	2027	2028
Kinder	16	20	20
Grade 1-9	119	123	120
Home Education	81	100	100

We offer the following four program choices:

1. **Kindergarten** - 475 hours of instruction, onsite full days Tuesdays/Thursdays with field trips
2. **BlendEd** - 950 hours of access to instruction using our unique “BlendEd” model that combines various forms of face-to-face instruction with an online component to cover the Alberta Programs of Study (Gr. 1-9)
3. **Online**-Similar to the BlendEd model but 100% online with no onsite component (Gr.1-6)
4. **Home Education** - Parent-designed and directed, but supervised by Phoenix (Gr. 1-12)



## Engagement Process

Over the years, Phoenix has engaged its stakeholders in many ways. The school has developed its own parent, student and teacher survey instruments. We also use data obtained from a variety of survey instruments including the provincial Assurance Measures Survey to inform our decision making process. We have an active Board that consists of ~50% parents from the school who reviews our Annual Education Results Report and focuses on questions relevant to our continued growth and improvement. The school leadership team engages the broader community (local neighborhood and other elements within our city) to implement strategies around student safety, learning, and support.

## So, Who Are Our Stakeholders?

Participant stakeholders at the Board’s Annual Education Planning Engagement were asked to answer this question. The consensus was that our stakeholders include:

- Students and Parents
- Board and Staff
- Community members
- AISCA

The above groups may also incorporate:

- Grandparents
- Other schools
- Neighbors
- Alberta Education
- Future employers and Post-secondary
- Community and Government agencies
- Municipal government
- ... Even the media.

### How does stakeholder input inform our plan?

We listen, we reflect and then if possible . . . we change. We understand that change must serve the majority and improve our practice. We strive to excellence in all that we do. For example:

We needed to adjust our fees for the upcoming year. The board’s decision was communicated in a variety of ways but parents still felt uncertain. They asked for an evening where they could ask question.

With in an hour, an event was organized and invites went out! We are proud of how nimble and responsive we are and can be!

In one way or another, all members of a functioning society exist as stakeholders in education. Stakeholders have been involved in this Education Plan:

- Through the daily commitment of our Board and Leadership Team in engaging our students, staff and community;



- Through the ongoing conversations and engagement that our staff has with students, staff, parents and the community;
- Through board meetings; and,
- Through, specific events and activities that were held to facilitate planning, based on a model of assurance, including:
  - Various parent surveys conducted over the year - Teen electives, resource selection, feedback on programming, home education supports, mental health needs
  - Student feedback surveys
  - Various staff meetings and sessions

**As the leadership team developed this Education Plan under the Assurance Framework, we considered:**

- Our previous Annual Education Results Report
- The Alberta Business Plan
- Previous Education Plans
- Our Foundational statements (Mission, beliefs etc.)
- The Assurance Framework Domains
- Local Data (Survey from families, board input, targeted focus groups, staff observations)





## Domains

Our education plan is organized around the primary domains within education. Each domain considers the primary force that is acting on our system of education.



- **Domain FIVE** includes the Local and Societal Context in which education occurs. This domain wraps around and influences all the other domains. *It is included and woven throughout all the other four domains.*

- **Domain FOUR** involves the Governance of our school within the education system. *Phoenix has a skilled Leadership team (Head of School, Principal, Building Manager, Care Coordinator) as well as an engaged board of directors.*

- **Domain THREE** is Learning Support. We are not a designated special needs school and yet a huge piece of student success is not only the support from the school but also the encouragement they receive at home. *We believe that parents are the primary and ongoing educators of their children: therefore, a meaningful partnership with them is critical.*

- **Domain TWO** encompasses Teaching and Leading as teachers and school leaders interact with our learners each and every day. *We believe that the support and guidance of our caring, dedicated, qualified professionals will enhance the academic, physical, social, spiritual and emotional qualities of our students.*

- **Domain ONE** is Student Growth and Achievement - students are naturally at the center. *We believe that each child has unique talents, skills, interests and learning styles, and that their education should respect these key elements.*

## Summary of Priorities

Soaring to brilliance takes hard work and effort . . . we intend to focus on these areas:

- **Student Growth and Achievement** - specifically onboarding the new screenings and the Div 2 social studies curriculum and;
- **Governance** - specifically succession planning for our Head of School



## DOMAIN ONE: Student Growth and Achievement

<p><b>Reflection on Past AERR</b></p> <ul style="list-style-type: none"> <li>• Strengths</li> <li>• Areas for improvement</li> <li>• Trends and/or needs</li> <li>• Stakeholder feedback</li> </ul>	<p><b>Strengths:</b> Previous interventions, such as Reading Chicks and Flight School, have shown success in providing targeted support to students with identified literacy and numeracy gaps.</p> <p><b>Areas for improvement/Trends:</b> A persistent academic gap, particularly in early literacy and numeracy for students in Grades 1-3, remains a concern. The need to effectively onboard new curriculum and implement early screening tools is a priority to ensure early identification and targeted intervention.</p> <p><b>Stakeholder Feedback:</b> Teachers identified the screen tools as somewhat helpful although time consuming for younger grades. Parents identified the intervention as helpful and that students enjoyed programs such as Reading Chicks.</p>
<p><b>Current Outcomes</b></p>	<p><b>Students experience, and can effectively demonstrate and achieve, student learning outcomes and competencies across the Alberta Programs of Study. This applies to our FNMI students as well.</b></p>
<p><b>Provincial Measures</b></p>	<ul style="list-style-type: none"> <li>• Will include our Provincial Achievement results for grades 6 &amp; 9</li> <li>• K-5 screening results showing a decrease in students at risk</li> </ul>
<p><b>Local Measures</b></p>	<p>The majority of teachers feel that students achieved mastery of the competencies as demonstrated through final report cards particularly with regard to the grade 4/5/6 social studies curriculum.</p>
<p><b>Strategies</b></p>	<p>To ensure all students can effectively demonstrate learning outcomes and competencies across the Alberta Programs of Study, we will implement two key strategic initiatives:</p> <ol style="list-style-type: none"> <li>1) Enhancing early identification and targeted intervention through the deployment of new K-5 screening tools, and</li> <li>2) Ensuring full and effective teacher readiness and curriculum alignment for the new Division 2 Social Studies curriculum.</li> </ol>
<p><b>Plan to Implement</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> What resources</li> <li><input type="checkbox"/> What PD</li> <li><input type="checkbox"/> What processes or adjustments</li> </ul>	<p style="text-align: center;"><b>New Screening Implementation Plan</b></p> <p><b>Resources</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Ensure that teachers know how to access the NewlearnAlberta Screening hub</li> <li><input type="checkbox"/> Any materials required for the screening</li> <li><input type="checkbox"/> Postage for mailing out results to parents</li> </ul> <p><b>Professional development</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Review processes with teachers</li> </ul> <p><b>Process or adjustments</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Schedule time for the assessment</li> <li><input type="checkbox"/> Possibly add results to PASI (Staffing time allotted for more requirements)</li> <li><input type="checkbox"/> Add screening results to the report card package</li> </ul> <p style="text-align: center;"><b>New Social Studies Implementation</b></p> <p><b>Resources</b></p>



	<ul style="list-style-type: none"> <li><input type="checkbox"/> Review curriculum and purchase teaching resources - spring 2026</li> <li><input type="checkbox"/> Designate a teacher to create the online courses - spring 2026</li> <li><input type="checkbox"/> Allocate time for teacher to create courses - spring 2026</li> <li><input type="checkbox"/> Purchase student resources - spring 2026</li> <li><input type="checkbox"/> Principal to review prior to implementation - Fall 2026</li> <li><input type="checkbox"/> Review new courses with grade 4/5/6 teachers - Fall 2026</li> <li><input type="checkbox"/> Monitor course use and student success throughout the year (YE 2027)</li> </ul> <p><b>Professional Development</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Find and share PD opportunities to learn about the new social curriculum for grades 4/5/6</li> <li><input type="checkbox"/> Host a 4/5/6 course review internally by Curriculum Design Teacher</li> </ul> <p><b>Processes or Adjustments</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> New student resources must be purchased, catalogued and added to the student resource box.</li> </ul>
<p><b>Future Impact</b></p>	<p>Earlier identification of students at risk through the new K-5 screenings, facilitating timely and targeted intervention programs to close the academic gap in literacy and numeracy. Full integration and monitoring of the new Division 2 Social Studies curriculum, ensuring mastery of competencies for students in Grades 4/5/6.</p>

## PHOENIX EDUCATION FOUNDATION OUR 7 CORE VALUES

**COMMUNITY**  
A culture of acceptance, learning, and collaborative partnership for all.

**KINSHIP (FAMILY)**  
Meaningful partnership with parents as the primary and ongoing educators.

**EXPERIENTIAL LEARNING**  
Unique, hands-on, multi-sensory opportunities like 'In-the-Scene' classes.

**SASSINESS (LIGHT-HEARTED FUN)**  
Encouraging curiosity, passion, and the unique voice of every child.

**LIFE-LONG LEARNING**  
Developing an active journey of inquiry and continuous personal growth.

**FRUGALITY**  
Efficient, effective, and collaborative use of accredited funding.

**NIMBLENESS (FLEXIBILITY)**  
Adaptable programming, from BlendEd to parent-directed home education.

21ST CENTURY EDUCATION FOR K-GR 9

EST. ON THESE 7 FOUNDATIONS | AN ALBERTA-ACCREDITED PRIVATE NON-PROFIT INDEPENDENT SCHOOL | CALGARY, AB, CANADA | PHOENIXFOUNDATION.CA



## DOMAIN TWO: Teaching and Leading

<p><b>Reflection on Past AERR</b></p> <ul style="list-style-type: none"> <li>• Strengths</li> <li>• Areas for improvement</li> <li>• Trends and/or needs</li> <li>• Stakeholder Feedback</li> </ul>	<p>The overall evaluation for Education Quality was "Low" and "Declined" (82.3%) due to low survey participation, which meant results primarily reflected teen-student perspectives. The actions taken focused on mitigating instability and planning for improved oversight:</p> <ul style="list-style-type: none"> <li>• <b>Addressing Staffing Instability:</b> Staffing challenges, illness, and personal family matters impacted practice, particularly in the teen math program, and finding qualified staff was noted as an increasing difficulty.</li> <li>• <b>Curriculum Consistency:</b> To mitigate the lack of continuous onsite principal oversight, past Principal developed all of the Grade 4-6 science courses for teachers to ensure consistent pedagogy across the Schoology platform.</li> <li>• <b>Leadership and Supervision:</b> A new principal was hired to improve teacher supervision, and teacher progress is monitored through "post-flight debriefs" (frequent check-ins).</li> <li>• <b>Future PD:</b> Plans were made to track the number of professional development sessions focused on the new curriculum and First Nations, Métis, and Inuit (FNMI) teachings.</li> <li>• <b>Technology Exploration:</b> The school began exploring Artificial Intelligence (AI), leading to decisions regarding its use and general technology use.</li> </ul> <p><b>Stakeholder feedback:</b> While parent participation in the provincial survey was low, feedback highlighted concerns regarding communication delays with some junior high teachers. These delays, often ranging from 3-5 days, were primarily linked to the part-time status of several staff members.</p>
<p><b>Current Outcomes</b></p>	<ul style="list-style-type: none"> <li>• <b>To mentor new teachers and to support any teachers on an interim certificate to achieve their permanent.</b></li> <li>• <b>Ensure that all teaching and support staff have consistent leadership and supervision including regular reviews.</b></li> </ul>
<p><b>Provincial Measures</b></p>	<p>Results from the Assurance survey</p>
<p><b>Local Measures</b></p>	<ul style="list-style-type: none"> <li>• That one teacher achieves their permanent certification.</li> <li>• The majority of staff have had at least one review.</li> <li>• Staff are familiar with staff manual, policies and legislative requirements</li> </ul>
<p><b>Strategies</b></p>	<ol style="list-style-type: none"> <li>1) Implement a mentorship program and certification path for teachers on interim certificates to ensure the achievement of permanent professional status.</li> <li>2) Formalize and conduct annual performance reviews for all teaching and support staff to ensure consistent leadership, clear job expectations, and continuous professional growth.</li> <li>3) Integrate and monitor the implementation of key policy decisions, specifically relating to the use of Artificial Intelligence (AI) and the incorporation of First Nations, Métis, and Inuit (FNMI) ways of knowing into professional practice.</li> </ol>



<p><b>Plan to Implement</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> What resources</li> <li><input type="checkbox"/> What PD</li> <li><input type="checkbox"/> What processes or adjustments</li> </ul>	<p style="text-align: center;"><b>Path to Permanent Certification</b></p> <p><b>Resources</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Money set aside for the staff to attend PD sessions - Budget</li> <li><input type="checkbox"/> Time allocated for in-house support and mentorship - August 2026</li> </ul> <p><b>Professional Development</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Review of TQS and perhaps taking the courses being developed by AB Education - Fall 2026</li> <li><input type="checkbox"/> Review of Teacher Code of Conduct - Fall 2026</li> </ul> <p><b>Processes or Adjustments</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Contact AISCA in late fall re: name of teachers on this path - Nov 2026</li> <li><input type="checkbox"/> Conduct evaluation of applicable teachers - Feb 2027</li> </ul> <p style="text-align: center;"><b>Annual Review Process</b></p> <p><b>Resources</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Annual staffing review templates</li> <li><input type="checkbox"/> Leadership time allocated for the reviews</li> <li><input type="checkbox"/> Access to legal if needed</li> </ul> <p><b>Professional Development</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Principal to take course related to Teacher Growth and Supervision (2026)</li> </ul> <p><b>Processes or Adjustments</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Review expectations with staff in summer 2026</li> <li><input type="checkbox"/> Clarify job expectations and roles - summer 2026</li> <li><input type="checkbox"/> Adjust FTES according to student numbers - Fall 2026</li> <li><input type="checkbox"/> Ensure that all pieces of HR files are complete - Fall 2026</li> <li><input type="checkbox"/> Review Staff manual and policies as needed thru year - ongoing</li> <li><input type="checkbox"/> Repeat the process annually (2026-2029)</li> </ul> <p style="text-align: center;"><b>AI and FNMI Incorporations</b></p> <p><b>Resources</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Access to PD in these areas - throughout the year</li> </ul> <p><b>Professional Development</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> PD relevant to FNMI education and students (2026-2029)</li> <li><input type="checkbox"/> PD relevant to AI use and professional conduct (2026-2029)</li> </ul> <p><b>Processes or Adjustments</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Review any policies regarding AI use and any requirements by Alberta Education (2026-2029)</li> </ul>
<p><b>Future Impact</b></p>	<p>Increased staff retention and organizational stability through consistent supervision and the development of qualified, permanently certified teachers, alongside the active and consistent integration of current best practices in FNMI ways of knowing and appropriate use of Artificial Intelligence into professional practice.</p>





## DOMAIN THREE: Learning Supports

<p><b>Reflection on Past AERR</b></p> <ul style="list-style-type: none"> <li>• Strengths</li> <li>• Areas for improvement</li> <li>• Trends and/or needs</li> <li>• Stakeholder Feedback</li> </ul>	<p><b>Strengths:</b> The overall rating for providing a safe and caring learning environment remained high (95.9% overall, Very High/Maintained/Excellent). Students felt that the school was safe and caring, and that existing support clearly benefited students.</p> <p><b>Areas for Improvement/Trends</b></p> <ul style="list-style-type: none"> <li>• A need to ensure that parents participate and ensure their students are available to access the support and services provided.</li> <li>• A need for additional funding for mild/moderate supports and services</li> </ul> <p><b>Stakeholder Feedback:</b> There is an opportunity to enhance parental understanding of how student needs influence the school and classroom environment.</p>
<p><b>Outcomes</b></p>	<p>To introduce a mild/moderate fee for coded students. This fee may be waived for returning students if families demonstrate a financial need.</p> <p>To create an agreement with the parameters of any mild/moderate fees we waive for families.</p>
<p><b>Provincial Measures</b></p>	<p>Results from the Assurance survey</p>
<p><b>Local Measures</b></p>	<ul style="list-style-type: none"> <li>• Collection of 50% of the new tuition fee from our returning mild/moderate students and;</li> <li>• Collection of 95% of the new tuition fee from new students</li> </ul>
<p><b>Strategies</b></p>	<ol style="list-style-type: none"> <li>1. Formalize and implement the new mild/moderate fee structure for coded students, including a process for assessing financial need to grant fee waivers to returning students.</li> <li>2. Develop and enforce a mandatory Parent-School Service Agreement for all students receiving support, explicitly defining parental participation requirements and consequences for frequently missed scheduled services.</li> <li>3. Maintain and enhance the visibility and capacity of the CARE program to continue providing accessible social, emotional, and academic support to the school community.</li> </ol>
<p><b>Plan to Implement</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> What resources</li> <li><input type="checkbox"/> What PD</li> <li><input type="checkbox"/> What processes or adjustments</li> </ul>	<p><b>Resources</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Financial Tools: Formal Mild/Moderate Fee Waiver Agreement document, Phoenix Compassion Fund to assist families with financial need.</li> <li><input type="checkbox"/> Program Documentation: New Parent-School Service Agreement defining parental participation and consequences for missed services.</li> </ul> <p><b>Professional Development</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Staff Training: Train staff, especially front desk/admin, on the new fee structure, waiver criteria, and the collection process.</li> <li><input type="checkbox"/> Team Review: Review the new Parent-School Service Agreement and pay-per-use service expectations with support staff and teachers.</li> </ul> <p><b>Processes or Adjustments</b></p>



	<ul style="list-style-type: none"> <li><input type="checkbox"/> Consult with the Board about the need for this new fee.</li> <li><input type="checkbox"/> Waiver Administration: Implement a formal process for assessing financial need and granting fee waivers for the \$2,000 mild/moderate tuition fee to returning coded students.</li> <li><input type="checkbox"/> Fee Targets: Establish a collection plan to achieve local measures of 95% fee collection from new mild/moderate students and 50% from returning mild/moderate students.</li> <li><input type="checkbox"/> Pay-Per-Use Invoicing: Set up a system to track and invoice pay-per-use specialized support services (e.g., Flight School, OT, Speech).</li> <li><input type="checkbox"/> Documentation: Update the Junior High Program Guide and all registration materials to clearly reflect the new fee structure.</li> <li><input type="checkbox"/> Compliance: Ensure all students receiving support sign the mandatory Parent-School Service Agreement.</li> </ul>
<p><b>Future Impact</b></p>	<p>The primary positive impact is related to financial sustainability and increased accountability for support services:</p> <ul style="list-style-type: none"> <li>● <b>Increased Funding for Supports:</b> The fee is expected to secure "additional funding for mild/moderate supports and services", which addresses a noted area of need. The local measure aims to collect 95% of the fee from new mild/moderate students and 50% from returning students.</li> <li>● <b>Enhanced Support Capacity:</b> The additional funding supports the strategy to "Maintain and enhance the visibility and capacity of the CARE program", which provides social, emotional, and academic support.</li> <li>● <b>Ensured Parental Participation:</b> The fee structure is coupled with a strategy to "Develop and enforce a mandatory Parent-School Service Agreement". This agreement, which includes defining consequences for frequently missed services, addresses the past need "to ensure that parents participate and ensure their students are available to access the support and services provided".</li> <li>● <b>Financial Assistance for Returning Families:</b> A formal process will be implemented to assess financial need and grant fee waivers for the \$2,000 tuition fee to returning coded students.</li> </ul> <p><b>Potential Challenges</b> The potential negative impacts are mainly administrative and related to enrollment:</p> <ul style="list-style-type: none"> <li>● <b>Administrative Overhead:</b> Implementing the new structure requires significant new processes and resources.</li> <li>● <b>Potential Enrollment/Retention Risk:</b> Introducing a new fee could create a financial barrier for new families or cause friction with returning families, despite the waiver option. The local measure targets show an expectation that a high percentage of returning mild/moderate students (50%) will not pay the fee, indicating a recognition of potential financial sensitivity.</li> </ul>



## DOMAIN FOUR: Governance

<p><b>Reflection on Past AERR</b></p> <ul style="list-style-type: none"> <li>• Strengths</li> <li>• Areas for improvement</li> <li>• Trends and/or needs</li> <li>• Stakeholder Feedback</li> </ul>	<p><b>Strengths:</b> Consistent Board and Head of School collaboration ensured timely review and successful submission of required documents. Recruitment of new parent board members was an ongoing focus.</p> <p><b>Areas for improvement/Trends:</b> The critical need to formalize the Head of School succession plan has emerged, tied to Diana Stinn's eventual retirement. The FRIENDS OF PHOENIX fundraising group needs to be reactivated as it was inactive last year.</p> <p><b>Stakeholder Feedback:</b> Parents frequently communicated concerns to individual board members, which were subsequently brought to the attention of the Board and Head of School for discussion.</p>
<p><b>Outcomes</b></p>	<p>1) To complete a succession plan for the Head of School.                  2) The Board meets regularly to review policy and approve the Annual Operating Plan, Budget, 3 Year Plan, Annual Education Results Report and Audited Financial Statements. This includes an opportunity for the board members to reflect on their positions and contributions and a review of the bylaws on an annual basis.                  3) All documents are submitted in a timely manner.</p>
<p><b>Provincial Measures</b></p>	<p>Budget; Alberta Education Assurance Survey measure - parental involvement.</p>
<p><b>Local Measures</b></p>	<ul style="list-style-type: none"> <li>• Successful submission of required Alberta Education documents and continued funding.</li> </ul>
<p><b>Strategies</b></p>	<ol style="list-style-type: none"> <li>1. To formalize the Head of School succession plan and manage the Board transition.</li> <li>2. Ensure long-term financial sustainability by diversifying and increasing revenue streams, which includes reactivating the FRIENDS OF PHOENIX fundraising group and reviewing grants/fee structures.</li> <li>3. To support the Principal in quest for LQS certification.</li> </ol>
<p><b>Plan to Implement</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> What resources</li> <li><input type="checkbox"/> What PD</li> <li><input type="checkbox"/> What processes or adjustments</li> </ul>	<p style="text-align: center;"><b>Succession Plan</b></p> <p><b>Resources</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Board input on succession planning over the next three years</li> </ul> <p><b>Professional Development</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> PD opportunities for all Board Members</li> </ul> <p><b>Processes or Adjustments</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Adjust the board meeting templates to include time for reflection and a bylaw review.</li> <li><input type="checkbox"/> Establish a timeline for the Head of School and Board to recruit and launch the reactivated FRIENDS OF PHOENIX group.</li> <li><input type="checkbox"/> Define a specific revenue-generation target for the year.</li> <li><input type="checkbox"/> Complete a comprehensive review of the current fee structure and grant opportunities.</li> </ul> <p style="text-align: center;"><b>Supporting Principal</b></p>



	<p><b>Resources</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Staffing review templates, dedicated leadership time, professional development budget for LQS certification.</li> </ul> <p><b>Professional Development (PD)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The Principal will take LQS courses.</li> </ul> <p><b>Processes or Adjustments</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> No processes or adjustments are explicitly listed under this specific heading.</li> </ul> <p style="text-align: center;"><b>Plan for Friends of Phoenix</b></p> <p><b>Resources</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> None explicitly listed.</li> </ul> <p><b>Professional Development (PD)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> None explicitly listed.</li> </ul> <p><b>Processes or Adjustments</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Establish a timeline for the Head of School and Board to recruit and launch the reactivated FRIENDS OF PHOENIX group.</li> <li><input type="checkbox"/> Define a specific revenue-generation target for the year.</li> <li><input type="checkbox"/> Create promotional materials to recruit new volunteers for FRIENDS OF PHOENIX.</li> </ul>
<p><b>Future Impact</b></p>	<p>Increased organizational stability through a robust Head of School succession plan and formalized leadership team. Continued strong governance and oversight ensuring financial health and compliance.</p>



## HYBRID LEARNING IN CALGARY: FIND THE PERFECT FIT!

FULL-TIME EQUIVALENT, TEACHER-DIRECTED INDEPENDENT SCHOOLS (K-12)

<p><b>PHOENIX EDUCATION FOUNDATION</b></p> <p><b>GRADES 1-9</b></p> <p><b>PROGRAM:</b> BLENDED <b>SCHEDULE:</b> 2 Days On-site (T/Th) <b>ON-SITE:</b> Creation Studio, Flight School, Immersive Workshops</p> <p><b>LOWEST FEES:</b> ~\$450</p> 	<p><b>BCS@HOME</b> (Bears paw Christian)</p> <p><b>GRADES 1-12</b></p> <p><b>PROGRAM:</b> HYBRID/FLEX <b>SCHEDULE:</b> 1-2 Days On-site <b>ON-SITE:</b> Core Subject Focus, Christian Environment</p> <p><b>FLEXIBLE FEES:</b> ~\$1,400</p> 	<p><b>RUNDLE STUDIO</b></p> <p><b>GRADES 8-12</b></p> <p><b>PROGRAM:</b> RUNDLE STUDIO <b>SCHEDULE:</b> Regular Regular Connection Days <b>ON-SITE:</b> Fine Arts, PE, Labs, Community Days</p> <p><b>PREMIUM FEES:</b> \$16,800+</p> 	<p><b>CALGARY ACADEMY</b></p> <p><b>GRADES 9-12</b></p> <p><b>PROGRAM:</b> BLENDED+ <b>SCHEDULE:</b> 2+ Days On-site <b>ON-SITE:</b> Integrated Fieldwork, Campus Resources</p> <p><b>ELITE FEES:</b> \$18,400+</p> 
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\*Neurodiverse support focus.

**\*\*ALL PROGRAMS ARE FULL-TIME EQUIVALENT & TEACHER-DIRECTED\*\***

**GET THE FLEXIBILITY YOU NEED & THE ACADEMIC QUALITY YOU DESERVE!**



## Domain Five: Local and Societal Context

<p><b>Reflection on Past AERR</b></p> <ul style="list-style-type: none"> <li>• Strengths</li> <li>• Areas for improvement</li> <li>• Trends and/or needs</li> <li>• Stakeholder feedback</li> </ul>	<p><b>Strengths:</b> Our strengths lie in the adherence to our 7 core values: Community, Kinship, Experiential Learning, Sassy, Life-Long Learning, Frugal, and Nimble. These values reinforce the unique partnership with parents who we believe are the primary educators of their children.</p> <p><b>Areas for Improvement:</b> However, persistent operational and financial challenges have necessitated a critical internal assessment regarding the Foundation's long-term sustainability and continued relevance in the current socio-economic landscape.</p> <p><b>Stakeholder Feedback:</b> Parents expressed concerns regarding fee adjustments; while acknowledging the rising operational costs, there remains resistance to the associated financial impact.</p>
<p><b>Outcomes</b></p>	<p><b>To explore how we are fulfilling our Mission Statement and how we can improve the unique aspects of the school.</b></p>
<p><b>Provincial Measures</b></p>	<p>None</p>
<p><b>Local Measures</b></p>	<ul style="list-style-type: none"> <li>• Successful completion of a comprehensive stakeholder survey assessing perceived Mission fulfillment and adherence to the 7 core values</li> <li>• Documentation and formal approval of the school's "unique value proposition" by the Board.</li> </ul>
<p><b>Strategies</b></p>	<ol style="list-style-type: none"> <li>1. Engage key stakeholders (Parents, Staff, Board) in focused conversations to define the school's unique value proposition and ensure strategic alignment with the Mission Statement.</li> <li>2. Develop a long-term plan to ensure the Foundation's financial and operational sustainability based on the findings from the January 2026 strategic planning session.</li> </ol>
<p><b>Plan to Implement</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> What resources</li> <li><input type="checkbox"/> What PD</li> <li><input type="checkbox"/> What processes or adjustments</li> </ul>	<p><b><u>Resources</u></b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Stakeholder engagement survey instruments (parent/student/staff).</li> <li><input type="checkbox"/> Time allocated for the Board and Leadership Team to develop and review a strategic sustainability plan.</li> </ul> <p><b><u>Professional Development (PD)</u></b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Leadership Team review of the outputs from the January 2026 Strategic Planning Session.</li> </ul> <p><b><u>Processes or adjustments</u></b></p> <ul style="list-style-type: none"> <li>• Finalize and distribute a comprehensive stakeholder survey to assess Mission fulfillment and core value perception.</li> <li>• Integrate the new Unique Value Proposition into all recruitment and promotional materials.</li> </ul>
<p><b>Future Impact</b></p>	<p>Clear and shared understanding among all stakeholders of the Phoenix Education Foundation's unique aspects and value proposition. Enhanced long-term organizational sustainability and relevance in the evolving educational landscape.</p>



# Budget Summary

Independent School Authority Code: 0175

**BUDGETED STATEMENT OF OPERATIONS**  
for the Year Ending August 31  
(in dollars)

	Budget 2026/2027	Projected 2025/2026 <small>(Note 1)</small>	ACTUAL 2024/2025 <small>(Note 2)</small>
<b>REVENUES</b>			
Alberta Education and Childcare (excluding Home Education)	\$1,150,584	\$1,105,921	\$1,001,757
Alberta Education and Childcare - Home Education	\$191,174	\$203,626	\$171,006
<b>Total Alberta Education and Childcare Revenues</b>	<b>\$1,341,758</b>	<b>\$1,309,547</b>	<b>\$1,172,763</b>
Other Government of Alberta	\$0	\$0	\$9,250
Federal Government and/or First Nations	\$0	\$0	\$0
Other Alberta school authorities	\$0	\$0	\$0
Instruction fees / Tuition fees	\$70,000	\$85,000	\$122,203
Non-Instructional fees (O&M, Transportation, Admin fees)	\$15,000	\$15,500	\$33,034
Other sales and services	\$15,000	\$15,000	\$27,001
Interest on investments	\$15,000	\$25,000	\$52,236
Gifts and donations	\$5,000	\$10,000	\$18,308
Amortization of capital allocations (where applicable)	\$0	\$0	\$0
Other (specify):	\$0	\$10,000	\$0
<b>TOTAL REVENUES</b>	<b>\$1,481,758</b>	<b>\$1,470,047</b>	<b>\$1,434,795</b>
<b>EXPENSES</b>			
Home Education	\$199,880	\$203,626	\$219,880
Instruction - ECS	\$97,877	\$91,863	\$97,877
Instruction - Grades 1 to 12	\$998,873	\$913,369	\$898,873
Operations and maintenance	\$94,701	\$79,374	\$73,413
Transportation	\$70,072	\$89,273	\$63,129
Board and System Administration	\$98,197	\$92,320	\$92,846
External Services	\$0	\$17,359	\$5,551
<b>TOTAL EXPENSES</b>	<b>\$1,459,600</b>	<b>\$1,467,184</b>	<b>\$1,451,369</b>
<b>SURPLUS(DEFICIT) OF REVENUES OVER EXPENSES</b>	<b>\$2,158</b>	<b>\$2,863</b>	<b>(\$16,574)</b>
	\$2,158		

**Changes or shifts due to results and priorities:**

We anticipate a shift in student demographics as we implement fee adjustments. While new families continue to demonstrate strong interest regardless of these changes, some existing families have expressed reservations regarding the increase. Consequently, despite expanded marketing initiatives, we are preparing for a potential short-term fluctuation in enrollment numbers.

**Want a digital copy?** This document can be found at <https://phoenixfoundation.ca/board-business/>

**Many a mickle makes a muckle . . . meaning that when we look after the small things, it adds up to create something wonderful!**