

2016 – 2017



The logo features the letters 'CAIS' in a bold, black, sans-serif font. A red vertical bar is positioned between the 'C' and 'A'. To the left of the 'C' is a small red plus sign. To the right of the 'A' is a vertical red line that extends downwards, separating the 'A' and 'IS' from the word 'PROGRAM'. The word 'NEXT STEP' is written in large, bold, black capital letters above 'PROGRAM'. The background of the logo is a light grey with faint, repeated text in a smaller font: 'JOBSHADOWING', 'DEVELOPMENT', 'SCHOOL IMPROVEMENT', 'NEXT STEP SESSIONS', 'LEADERSHIP', 'JOBSHADOWING', 'DEVELOPMENT', 'SCHOOL IMPROVEMENT', 'NEXT STEP SESSIONS', 'LEADERSHIP', and 'JOBSHADOWING'.

CAIS | **NEXT STEP**
PROGRAM

**Developing leaders today
for Canada's best
schools of the future**

This package includes the following components:

- Program Vision, Overview and Requirements
- Application process
- Timelines and Commitments
- School Impact: The Change Project
- Leadership Development: Job Shadowing, Mentorship & Self-Awareness
- Appendix

Our Vision

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

Our Mission

To pursue continuous whole school improvement through
exemplary leadership training, research, and accreditation.

Professional Development Mission:

CAIS' professional development program is national, based on current and global effective practice and prepares, and connects and supports leaders in independent schools; ultimately, it has a demonstrable impact on educational excellence, leadership development and continuous whole school improvement.

Our Values

Student-Centred

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

Leadership

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

Excellence

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

Collaboration

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

Relevance

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

National & Global Perspective

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

Inquiry and Understanding

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

Background: Developing leaders who will shape the future of education.

In 2000, a group of CAIS Heads had a vision that the national organization should develop talent, and they created a Leadership Institute (now affectionately known as the LI). The program includes a variety of modules that are specific to the unique nature of independent schools, and the facilitators are leaders in our community who ensure content is relevant and practical to school improvement. Over the years, this program has grown to include a variety of modules, and we are honoured to engage with over 100 participants each summer. The evidence of success is twofold:

- Many of our grads have gone on to assume leadership positions in our schools, including Headships.
- Our grads report that our program has had significant impact on their growth both personally and professionally; additionally, they can demonstrate the impact of our program on our schools.

In 2010, we heard from our graduates that they wanted to experience more CAIS leadership development. We also heard from our schools that there was a need for a targeted program for those administrators who were looking to take the next step in their careers. There had to be an application process and there had to be more experiential learning with impact on our schools. And thus, we launched the Next Step Program. We developed a two-year curriculum, hired three facilitators and five mentors, and limited the program to 12 participants. Our program included two summers and a one-year change project that was supported by mentors.

In 2015, we commissioned Susan Wright to conduct research to better understand the changing leadership landscape. “*Leadership in our schools: A Research Project*” highlights the following:

- 6 out of 10 of Heads in CAIS schools (That's 58 people!) anticipate they will retire or leave their schools in the next 6 years
- 1 in 5 of the Heads (22%) say they anticipate retiring or leaving their schools fewer than 3 years from now
- 66% of current Heads were not selected from within their school – they were at another school within Canada (50%) or came from a school outside Canada (16%)
- 18% of Heads are not developing any potential successors for potential future headship at their schools

Clearly, there is going to be incredible turnover, and all members of the leadership team are going to need to be more conversant with all aspects of school change.

Now in 2016, after two rounds of the program, we are excited to offer an enhanced opportunity. We surveyed participants; we researched leadership models and competencies; we listened to the advice of Heads, Boards, Leaders, and Search Consultants; and we met as a team to really understand how to best prepare future leaders.

We are proud to share our new program.

Program Overview

We identified four main areas of leadership growth worthy of focus:

1. Ensure emerging leaders participate with seasoned professionals at the Leadership Institute, as well as in job shadowing, accreditation, and mentoring experiences;
2. Strengthen leadership capacity through new self and peer assessments, that develop self-awareness and support growth as a leader and learner;
3. Encourage peer support and collaboration through a National Cohort experience; and
4. Guide leaders in actively identifying an organizational need and designing an initiative through the development of a Change Project.

CAIS prepares leaders today to lead schools of the future. This requires a new set of knowledge, skills, networks, and experiences.

The leader of the future will understand:

- Vision, Mission, Values and Strategy
- The business of independent schools, including finance, governance, human resources, enrolment management, communications, risk management, and advancement
- Local, national and international challenges facing schools and the future of education
- His/her leadership style
- How to motivate others
- How to lead effective change

The leader of the future will be able to demonstrate:

- Strategic visioning and planning
- Adaptability and understanding of the change process
- Alignment between talent and organizational needs
- Collaboration with a diverse group
- Communication in writing and presenting
- Coaching conversation skills
- Self-awareness
- Deep understanding of school culture
- Life-long learning and humility
- Hard-work, time-management, and perseverance
- Problem-solving some of the most complex school challenges
- Use of emerging technology

Program Requirements

The program involves two in-person summer programs at the CAIS Leadership Institute:

- July 2016 at St. Andrew's, ON.
- July 2017 at King's- Edgehill, NS.

In addition to being on-site for two summers, participants will take one year to experience the following:

1. Read Top 12 articles, The 2051 Report, and two books:
 - a. *Switch: How to Change Things When Change Is Hard.*
 - b. *Seven Secrets of the Savvy School Leader*, Robert Evans
2. Meet monthly with your mentor
3. Meet regularly with your Head of School
4. Complete job shadowing by December 2016
5. Complete a two part Leadership Assessment (Part One: Self-Awareness in May 2016; Part Two: 360 Feedback in May 2017)
6. Participate in an accreditation review and receive feedback from the CAIS On-site Coordinator
7. Engage in all cohort meetings and seminars
8. Practice coaching conversation techniques
9. Present at a staff/board/parent meeting and/or conference
10. Design and complete your pre-approved Change Project

An **Advanced Leadership Institute Diploma** will be presented to participants upon successful completion of the Next Step Program in July 2017.

Application Process

Eligibility

The Next Step Program is designed for leaders who have at least three years in a leadership role, have the support of their Head of school, and have demonstrated a commitment to professional development. Preference will be given to candidates who have completed several modules at the Leadership Institute and have been on an accreditation review.

The Change Project

Applicants must provide a summary of their proposed project that addresses a need in their school and is supported by their Head of School.

Head of School Endorsement

The Head of School must nominate the Candidate for the program and support his/her attendance at the Next Step Program at the Summer Leadership Institute. Additionally, the Head must support the following:

- The Change Project – what need can the Candidate address within the school?
- Monthly meetings with the Candidate:
 - o Ongoing review and support of the Change Project
 - o De-briefing and discussing Mentoring and Job-Shadowing process
- Provide an opportunity for presentation and accreditation experiences (if necessary)
- Job shadowing experience
 - o Support in the arrangement of a two-day job shadow experience in another CAIS School that suits the unique learning opportunity for the Candidate. (i.e. Head, Professional in Business, Fundraising, Enrolment Management, and/or Human Resources, etc)
- Board meeting experience
 - o Ensure there is an opportunity to attend and possibly contribute to a Board meeting

The Head of School will be asked to sign the Head of School Endorsement Agreement (see appendix).

Cost

The cost of this two-year program is as follows:

- Part One - \$1975 (due prior to the start of the 2016 Summer LI)
- Human Resources Module \$150 (to be taken by those that have not completed the module in the past)
- Part Two - \$1975 (due prior to the start of the 2017 Summer LI)

Timelines

Application deadline: April 30, 2016

Schedule: Before July 2016

Date	Task/Assignment	Facilitator
June 2	Cohort meeting (by zoom) with all participants to discuss: <ul style="list-style-type: none">- Overview of the program- Finding and working with a Mentor- Creating the ideal Job Shadow experience- Completing the Leadership Assessment Tool (Part One: Self Assessment)- Refining your Change Project – know your school; know your self	AM Kee Val Cambre David Hadden David Robertson Barry Wright
June	Participants to complete/return the following: <ul style="list-style-type: none">- Mentor confirmed- Job Shadow checklist- Leadership Questionnaire- Confidentiality form- Head Authorization form Reading assignments: <i>The 2051 Project</i> and <i>Switch: How to Change Things When Change Is Hard</i> . Suggested reading for mentors: <i>Gift of You, Leadership & Netgiving</i> .	Sheri Little

Schedule: July 2016

Date	Task/Assignment	Facilitator
July 2		
8:30pm	Informal meet and greet after the LI dinner	All
July 3		
8am – 8:15am	Welcome and launch of the third Next Step Program	All
8:15am-10am	<p>Personal Development: Understanding Leadership</p> <ul style="list-style-type: none"> a) Review Leadership Awareness/ Self-Awareness Part One results b) Interpersonal Dynamics <p>Focus on Knowledge of the School Leader's Role</p> <ul style="list-style-type: none"> a) Leading with vision and integrity b) Strategy and Innovation to enhance the Value Proposition c) The Business of Schools: Enrolment and Fundraising Revenue <p>Focus on Knowledge of Schools of the Future</p> <ul style="list-style-type: none"> a) The Top 20 CAIS Questions b) The 2051 Project c) Culture eats strategy for lunch 	VC
10:15am-5:00		DBR/DH
5pm - 6:30pm	Recreation break – Individual feedback on the Leadership Assessment Part One	
6:30pm - 8:30pm	Dinner	

July 4		
8am – noon	Group Case Study and Presentations: Permanence and Strength in CAIS Schools	DBR/DH
12:30pm - 5:30pm	Focus on Leadership Skills: Change Management Let's get started: Your Change Projects and the year ahead	BW
5:30pm - 6:30pm	Recreation break	
6:30pm - 9:00pm	Next Step Group Dinner and Reflection: “Campfire with Barry”	BW
July 5		
8am – 9:00am	Focus on Resilience, Risk and Relationships a) BHAG b) Your national cohort c) Your mentor	AMK
9:00 - 11:30am	Next Steps: Where do we go from here? - Problem Solving & Strategic Decision making - Effective Meeting management	VC
12:30pm - 5:00pm	LI Module: Human Resources module is <u>required</u> for participants that have not previously taken the course; other <u>optional</u> modules include Advancement, Coaching, Design Thinking for School Innovation, Finance, Mental Health, Governance, and Women and Leadership. Next Step Participants are encouraged to choose one.	
July 6		
8:00am - 12:30pm	Module continued	

Schedule: August 2016 – June 2017

Program Requirements: In addition to being on-site for two summers, participants will complete the following:

- Read *Seven Secrets of the Savvy School Leader*, Robert Evans
- Meet monthly with your mentor
- Meet regularly with your Head of School
- Complete job shadowing by December 2016
- Complete a two part Leadership Assessment (Part One: Self-Awareness in May 2016; Part Two: 360 Feedback in May 2017)
- Participate in an accreditation review and be evaluated by the CAIS On-site Coordinator
- Attend all cohort meetings and seminars
- Practice coaching conversation techniques
- Present at a staff/board/parent meeting and/or conference
- Design and complete your Change Project

Note: All cohort meetings will take place by zoom. Details will be sent in September 2016. In addition to program updates, the purpose is to challenge and support each other.

Date	Task/Assignment	Facilitator
September 2016	Cohort meeting – Focus on Change Projects	AMK/DH
October	Cohort meeting: Leadership Development Seminar #1 - Focus on Legal School Issues	VC Guest presenter
November	Cohort meeting: Leadership Development	VC
December	Cohort meeting: Focus on Change Projects	AMK/DH
January 2017	Cohort meeting: Leadership Development Seminar #2 - Focus on Financial School Issues	VC Guest presenter
February	Cohort meeting: Focus on Change Projects	AMK/DH
March	Cohort meeting: Leadership Assessment (Part Two)	DH/VC
April	Cohort meeting: Leadership Development Seminar #3 – Focus on Communication	VC Guest presenter
May	Cohort meeting: The final Change Project “Product”	AMK/DH

Schedule: July 2017 – DRAFT to be updated based on participant feedback

Date	Task/Assignment	Facilitator
July 3		
8am – noon	Understanding yourself as a leaders One on one 360 Feedback and coaching Sessions	VC & ALL
1pm - 4pm	Crucial conversations and Coaching conversations Leadership Assessment (Part Two) feedback	ALL
4pm - 6:30pm	Recreation break	
6:30pm - 8:30pm	Dinner	
July 4		
8am – 6:00pm	Change Project Presentation Day	ALL
6:00pm - 7:00pm	Recreation break	
7:00pm - 9:00pm	Next Step Group Dinner at Headmaster's House	ALL

July 5		
8am – 11:30am	Session based on: Seven Secrets of the Savvy School Leader	DBR/DH
12:30pm - 3:00pm 3:15pm - 5:00pm	<p>Roundtable Discussion</p> <ul style="list-style-type: none"> - Debriefing on Job shadowing & leadership skills awareness through their program and experience with the mentoring <p>Talent Strategy Management/Mentorship</p> <ul style="list-style-type: none"> - Focus on leadership capability when leading teams - Understanding people development - Setting and communicating direction through conversational intelligence 	ALL
5:00pm – 7:00pm	Recreation Break	
7:00pm – 9:00pm	Dinner and Grad ceremonies (Next Step and LI)	ALL
July 6		
8:00am - 12:00pm	Wrap up – Resume / Interview skills / networking for future leadership roles	VC/AMK

The Change Project – September 2016 - June 2017

As part of the sustained, practical leadership experience, applicants will choose a Change Project to be implemented from September to June in his/her individual school. The Project, aligned with the strategic needs of the school, must be developed by the applicant and supported by the Head of School.

As leading change is known to be a challenging and often lonely pursuit, all participants are expected to find a mentor and maintain contact with him/her as well as with the National Cohort throughout the year in order to connect and support each other.

The Change Projects will not only have demonstrable impact on the various individual schools, but also, ultimately, they will contribute to leadership development, educational excellence and school improvement across Canada.

Participants will develop a working document that will be used to engage stakeholders in the change process as well as guide the project. The Change Document should include a Table of Contents with the following elements:

- Introduction (includes background, rationale for change, project description, etc)
- Overall Challenge and Goals
- Timelines and Critical Success Factors
- Strategies and Tactics
- Engagement Models
- Measuring Success
- Appendices

For the period from July 2016 to May 2017, the Change Document will remain in draft and will be revised, as necessary, based on feedback from the following key stakeholders:

• CAIS Executive Director review	August 2016
• Head of School review	September 2016
• Mentor review	October 2016
• Stakeholder review	October – December 2016
• National Cohort review	November 2016
• CAIS Executive Director review	January 2017
• National Cohort review	February 2017
• Mentor review	March 2017
• Stakeholder review	May 2017
• Submit report and presentation to CAIS	June 2017

Leadership Development

All of the following components are to be organized by participants, in consultation with their Head and Next Step Facilitators.

Leadership Assessment – Two Parts

In May 2016, participants will complete a Self-Awareness assessment; in May 2017, participants will complete a 360 Feedback assessment. This will allow participants to understand their strengths and preferred style and also have a better understanding of other management styles and capabilities. They will be able to review their own impressions but also receive feedback on their capabilities in a positive and meaningful way.

Job Shadowing

New to the program is a job shadowing component whereby participants have the opportunity to spend time with another Head and members of a leadership team in another school, whose portfolios are less familiar.

Participants will work with their Head to suggest, identify and contact their colleagues to assist with arranging a job shadowing experience. CAIS will assist with placements if necessary. The schools are expected to arrange internal coverage for participants, if needed, and pay for travel. This two-day experience may take place at the same school, or different schools.

The positions to be shadowed include the following:

- Head of School
- Leadership Team members including Directors of Finance, Advancement, Enrolment Management, Human Resources, Learning, etc.

Mentoring

Mentoring is a process that supports individuals to make more conscious decisions and challenges them to take new action with greater levels of courage, self-awareness, and intentionality. Outcomes include enhanced communication skills, better relationships, project completion, and increased confidence with humility.

In general terms, mentors spend 90% of their time asking tough questions and listening deeply. Mentors spend roughly 10% of the meeting time providing advice, insight, examples, and information.

In a world where leaders cannot act alone, finding a mentor and nurturing a two-way relationship is a skill that all leaders require.

Practice coaching conversation techniques

Conversational intelligence is key in setting clear direction and engaging teams.

Presenting

Superior communication skills are required of today's leaders.

Engaging in National Cohort meetings

Leaders surround themselves by a diverse group of colleagues who support and challenge each other; they commit to ongoing learning; and they have the courage to ask tough questions of each other and share their thinking about their learning and their schools.



Appendices

Head Authorization and Consent Form
Confidentiality and Conflict of Interest Form
Participant Agreement



Next Step Program
Head of School Authorization & Commitment Form

The Head of School must nominate the candidate for the program and be committed to providing the following, in addition to supporting their attendance at the Next Step Summer Programs:

- Ongoing review and support of the Change Project
- Monthly meetings with the Candidate:
 - o De-briefing and discussing the Change Project, mentoring, job-shadowing, presentation and meeting experiences
- Job shadowing:
 - o Support in the arrangement of a maximum two day job shadow of a Leadership Team member of a CAIS School that suites the learning opportunity for the candidate.
- Board meeting Experience – optional
 - o Offer an opportunity to attend and experience a School Board meeting

Name of Candidate:

School:

Name of Head:

I _<name>_ nominate the above candidate and agree to develop the candidate through his/her learning process by ensuring opportunities for leadership development as outlined in the program requirements.

Signature

Date

Next Step Program **Confidentiality and Conflict of Interest**

Confidential Information: Next Step participants will be privy to sensitive, proprietary and confidential information and shall regard all information as confidential unless specifically advised or instructed otherwise. Such information must not be revealed or discussed with third parties without specific approval. The duty to maintain confidentiality shall continue indefinitely. Persons to whom this Policy applies who have committed an unintended breach of confidentiality will contact the Executive Director of CAIS to identify the issue so that any necessary remedial action can be planned or implemented.

Duties: Each person to whom this Policy applies shall act honestly and in good faith; have the best interests of the Corporation(s) in mind, and exercise the care, diligence and skill that a reasonably prudent person would exercise in comparable circumstances.

Conflict of Interest: Each person to whom this Policy applies should avoid engaging in any personal business which would conflict with either the business of the Corporation or his or her duties and responsibilities to the Corporation(s). A person to whom this Policy applies who has a material interest in any company or organization which has material dealings with the Corporation must disclose in writing such interest to the Executive Director of CAIS and must exempt himself or herself from participating in any discussion involving such interest.

Violations of this Policy: Each person to whom this Policy applies is responsible for being aware of, understanding and complying with this Policy and shall promptly report any problems or concerns and any actual or potential violation of this Policy to the Executive Director of CAIS.

Certificate

I certify that I have read and fully understand the Confidentiality and Conflict of Interest Policy and will comply with its provisions.

Participant:

Witness:

Signature

Signature

Print Name

Print Name

Date

Date



Canadian
Accredited
Independent
Schools

Next Step Program Participant Agreement

Participants will be required to sign a confidentiality agreement and participate in all Program Requirements:

1. Read Top 12 articles, The 2051 Report, and two books:
 - a. *Switch: How to Change Things When Change Is Hard.*
 - b. *Seven Secrets of the Savvy School Leader*, Robert Evans
2. Meet monthly with your mentor
3. Meet regularly with your Head of School
4. Complete two days of job shadowing by December 2016
5. Complete a two part Leadership Assessment (Part One: Self-Awareness in May 2016; Part Two: 360 Feedback in May 2017)
6. Participate in an accreditation review and be evaluated by the CAIS On-site Coordinator (unless you have completed one in the past three years)
7. Engage in all cohort meetings and seminars
8. Practice coaching conversation techniques
9. Present at a staff/board/parent meeting and/or conference
10. Design and complete your pre-approved Change Project

As a Next Step participant, I agree to the Program requirements as outlined above:

Name of Participant

Date

Signature of Participant

Signature of Head of School