Scholars

Playbook

Scholars

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Scholars

Chapter 1: Introduction & Strategic Planning

Scholars Core Vision

Scholars will be internationally recognized for student achievement, teaching excellence, family partnerships, and local community initiatives. Our lifelong learners - of all ages, from all walks of life - will embrace opportunities in the future with confidence and ease as a result of our individualized programming.

Scholars Core Mission

In a professional and comfortable environment, Scholars provides a broad range of individualized, relevant, and creative learning opportunities of the highest standards to students of all ages.

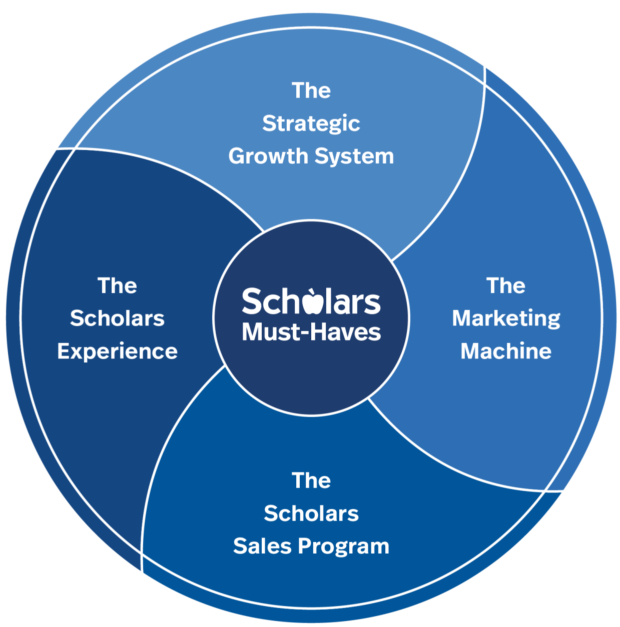
Scholars Core Pillars

01	**Excellence**	We are relentless in our pursuit of excellence.
02	**Pride**	We take pride in our business like we own it and love what we do.
03	**Discipline**	We do the right thing, the right way, every time.
04	**Support**	We actively offer solutions without bias to support others.
05	**Family**	We care about one another like family.

Scholars Must-Haves

Every successful Scholars location focuses on four “must-have” systems. These systems ensure that you are focused on the most important overarching concepts for the optimal implementation of core systems to set yourself up for success and growth! You will learn more about each one of these must-haves throughout this playbook. To begin, here’s a quick reference guide:

- ★ **The Strategic Growth System**
  - Focusing on working “on” the business rather than just “in” the business
- ★ **The Marketing Machine**
  - Making your presence known through a combination of digital-traditional-community initiatives
- ★ **The Scholars Sales Program**
  - Solution-based inquiry and conversion conversations
- ★ **The Scholars Experience**
  - Happy Parents + Happy Students + Effective Programs



Strategic Planning & The Entrepreneurial Operating System® (EOS)

For Head Office down to every location, Scholars strategic planning operates using the foundations of The Entrepreneurial Operating System® (EOS). The EOS Model® focuses on the Six Key Components™ of any business that must be managed and strengthened to become a great business. You can find additional information and resources about EOS here.

- **Vision:**
  - Strengthening this component means getting everyone in the organization 100% on the same page with where you're going and how you're going to get there.
- **People:**
  - Simply put, we can't do it without great people. This means surrounding yourself with great people, top to bottom, because you can't achieve a great vision without a great team.
- **Data:**
  - This means cutting through all the feelings, personalities, opinions, and egos and boiling your organization down to a handful of objective numbers that give you an absolute pulse on where things are.

Chapter 1: Introduction & Strategic Planning

With the Vision, People, and Data Components strong, you start to create a lucid, transparent, open and honest organization where everything becomes more visible and you start to "smoke out all the issues," which leads to…

- ★ **Issues:**
  - Strengthening this component means becoming great at solving problems throughout the organization – setting them up, knocking them down, and making them go away forever.
- ★ **Process:**
  - This is the secret ingredient in your organization. This means "systemizing" your business by identifying and documenting the core processes that define the way to run your business. You'll need to get everyone on the same page with what the essential procedural steps are, and then get everyone to follow them to create consistency and scalability in your organization.
- ★ **Traction®:**
  - This means bringing discipline and accountability into the organization – becoming great at execution – taking the vision down to the ground and making it real.

(The EOS Model®)

Yearly Strategic Plan Hub

To coincide with EOS methodology and Scholars Must-Have: The Strategic Growth System, you will find a variety of different tools and templates in the Scholars Google Drive Documents folder shared with each Scholars location. These resources have been built - and housed within a *Yearly Strategic Plan Hub* document to centralize your ideas, plans, visions, tracking, analysis, and reflection!

- ★ **One-Page Plan**
  - The One-Page Plan is considered to be the "cover letter" of your annual strategic plan. Consider this the one page that every employee could have in their pocket or in their personal planner that summarizes where you are going and what you need to do to get there.
  - From a year-long perspective, you are determining your Wildly Important Goals® (WIG®) for each of the Scholars Must-Haves and the metrics that align with these WIGS.

- You then will break down your WIGs into digestible quarterly “rocks” with metrics that align with the same.

★ **Financial Projections**

- To support your financial projections in your One-Page Plan, the Financial Projections tool allows you to input your projected income and expenses, along with testing proactive and passive strategies for optimization and efficiencies.

★ **Annual Marketing Plan**

- There are two tabs for the Annual Marketing Plan
  - One that includes steps to complete alongside a sample launch quarter for a new location
  - One that offers a template to develop the detailed plans associated with your Scholars Must-Have: The Marketing Machine

★ **Social Media Calendar**

- This tab facilitates the brainstorming and tracking of your locally driven social media content.

★ **SWOT: Competitive Analysis**

- It’s essential to conduct frequent competitive analyses to learn about your local competition - at least once a year.
  - Although you can find some general information online about many competitors, everyone claims to be the best! What you are truly looking for is how your local Oxford, Sylvan, Kumon, and even Jo-Mo's Tutoring present themselves.
- You will find a SWOT: Competitive Analysis Summary tab alongside a SWOT: Competitor Call Scorecard in your *Yearly Strategic Plan Hub*

★ **Community Schools List**

- This tab gives you the space to compile a list of schools in your community, including any additional notes about the type of school and any specialties they offer (French Immersion, AP/IB programs, etc.).
- This will ensure you have a firm grasp of the schools in your community to help you be prepared and confident when speaking with leads.

★ **FRANK List**

- The FRANK (Friends, Relatives, Acquaintances, Neighbours, and Kid Contacts) List is a quick brainstorming tool to consider the connections you have made - and will make - in your community.

★ **Community Events List**
  ○ Over the course of determining local marketing opportunities to fulfill your 4+1 Local Marketing Buckets, your review of community schools, considering your connections in your FRANK list, this tab is the perfect space to collect event information to follow-up on or action!

★ **L10 Tools: Agenda, Scorecard, Rocks, To-Dos, and Issues**
  ○ As part of the Entrepreneurial Operating System® (EOS®), the Level 10 Meeting (L10) establishes a consistent, weekly meeting pulse to optimize your management team's precious time by being able to focus on the most important items each week.

Location Organizational Structure & Role Titles

Scholars Resources

All resources needed to operate a successful Scholars location are found in one of two areas - either IQ's Internal Server Documents or the Scholars Google Drive documents folder.

Long-term and non-editable resource documents are found within IQ's Internal Server Documents, whereas short-term and editable templates are found in the Scholars Google Drive documents folder.

TIP: When accessing a template shared in the Scholars Google Drive documents, you will need to select File > Make a copy and then save it to a folder in *your* location's Google Drive to make it editable.

Behavioural Economics

Sales is communication. But some educators find themselves averse to sales. This is the reason that we have not made this about selling widgets, after all, we are here to help students succeed. We base our sales and enrollment process on the principles of behavioural economics. Behavioural economics studies the effects of ***psychological, cognitive, emotional, cultural***, and ***social factors*** on the economic decisions of individuals and institutions, and how those decisions vary from those implied by classical theory. In short, behavioural economics explains the ***decision-making process your prospective clients are going through when they are deciding whether or not to enroll their dependant at Scholars***. The best way to evoke the five factors mentioned above in a parent/guardian is through a ***question-based approach***, which we employ when taking inquiry, no matter what format they are received - call, email, walk-in, or e-lead.

Question-Based Approach to Increasing Revenue

As many franchisees and/or management staff are passionate about education and have spent most of their careers teaching, they often have limited sales experience. We can solve this obstacle by connecting with parents/guardians through a ***genuine conversation*** and show that we truly care about helping their child reach their potential. If we do not build credibility as an academic expert, it is difficult to sell to someone who is cautious and reluctant.

You need to earn the right to engage. After all, you are a stranger at this point asking questions about someone's child.

The alternative we see is people overcompensating by commoditizing Scholars' value. From our review of CallRail recordings, we have heard franchisees read program information off the website or the Parent Guide, which is a far less efficient approach. We are not taking a pizza order; parents/guardians are evaluating our ability to help their child become more successful in life. Ultimately, you need to deliver ***competence***, ***credibility***, and ***value*** to every family.

Whether on the phone, email, or in-person, asking for a name, number, and other "boring" information before you have earned that right lowers your chance of enrolling the student. These are considered "boring" questions because the caller already knows all of this information; they want you to educate them on why Scholars is the solution.

Get parents/guardians to share information ***without*** just going down the list and filling in the blanks like you are taking that pizza order!

★ **Listen to the Problems**
  ○ Leverage curiosity by asking diagnostic questions

★ **Understand the Alternatives**
  ○ Review the investment-justification of the purchase. Remember: investment is *not* just from a financial standpoint - consider the time, money, and energy investment.

★ **Offer the Scholars Solution**
  ○ Demonstrate the ***competence, credibility,*** and ***value***

Securing a Prospective Client's Time

To succeed, you need to ***secure your prospective client's time***. Do not rush through an inquiry. If more time is needed, book a follow-up call or location visit to continue the conversation. Make sure that every call or meeting is booked in your location's Google Calendar. Further, send them an invitation which includes your location address and any other information that adds value to the process, and therefore moves them closer to becoming enrolled in our program. This also means that you are not sharing their time with someone else and you have their full attention. Obviously, if they are connecting with you for the first time, we know they have made the time and there is no better opportunity to schedule them for a visit, or a complimentary assessment or trial hour.

To secure their time, in something as emotionally driven as the academic success of a child, superficial and generic phrases are the enemy. ***Specificity and purpose are your friends***. Trying to claim our own greatness tends to backfire, causing prospective clients to withdraw even further. That's because starting with the traditional elevator pitch is the quickest way to commoditize our value.

Which of our competitors doesn't claim to be the best? They all do! In which case, if we sound just like everyone else, we forfeit our competitive advantage. Everyone claims to be great, but not everyone demonstrates the ability to be a valuable asset.

By demonstrating that you know how to ask intelligent and relevant questions, you will communicate a higher level of ***competence***, ***credibility***, and ***value***. In order for your passion for education to be conveyed, we do not suggest reading from a script.

Establishing Credibility

We talked about piquing your client's curiosity to secure their time and attention. Now, it's time to focus on establishing credibility early in the conversation. In order for you to have an opportunity to uncover needs, present solutions, and ask for a commitment, parents/guardians must first perceive you as credible. The greater your credibility, the more parents/guardians will trust you and the more comfortable they will feel.

Validating information that you have already collected will help your credibility because it demonstrates to the parent/guardian that you have actively listened and/or done your homework in advance. It also gives you an opportunity to verify that this information is indeed correct. Of course, you can ask questions to gather new information as well. As you establish credibility, the parent/guardian will come alive. The best sales interactions turn into a conversation with both parties sharing information and ideas, as opposed to a one-way dump of information.

If you ask intelligent and relevant questions, you prove that you are a valuable resource that the client requires and trusts. This puts you in a great position and gives you an opportunity to provide valuable solutions.

You can gain a client's confidence by asking specific questions that demonstrate a higher level of competence and credibility. You want to understand the client's goals, objectives, and expectations since you cannot propose a valuable solution without first understanding the child's root issues.

We have such an easy sell: ***supporting every student in reaching their full potential***. We need to convey that they are indeed making a great decision in order to move forward through the enrollment process.

Beginning a conversation with a series of rehearsed lines puts you in an extremely weak position. Tutoring is a competitive market - there is nothing you can say at the buzzword level that's dramatically different from what our competitors are saying about their product, service, or company. The elevator pitch, therefore, tends to be counterproductive to your selling efforts because it commoditizes your value proposition and you will ultimately sound just like everyone else. ***Your power is in your authenticity!***

Truthfully, parents/guardians and children will experience the benefits of Scholars and that will be great for retention, but without your initial conversation skills, Scholars' greatness on its own will not get them in the door. You need to hear the **problems**, bring to light the **alternatives**, and then offer the **solutions**.

Problems → Alternatives → Solutions is how Scholars families make purchase decisions. Bond with the customer on their problems, not your solutions. Then ask questions that build on the value of our offering. To fully cement this concept, ask yourself this question: *what's more important to your parents/guardians: their problems, issues, concerns, goals, and objectives for their child, or hearing an elevator pitch from a tutoring company?*

The more reasons we give the parent/guardian to come to Scholars, the more motivated and urgent the decision is. Give them lots of reasons to pick Scholars. Many people tutor, so use ten implications to the competitor's one, and we win the business every time!

From reviewing CallRail recordings, we want to alert you to common mistakes that new locations make:

- Relying on customers to determine the root issue(s). You need to guide this conversation, which turns into reasons to enroll in Scholars today.
- Every Scholars' location starts with zero students. Do not rush to hand out deals to get people in the door. If they are only enrolling because they received a discount, then these clients are likely to remain a thorn in your side for as long as they are enrolled.
- Be a problem solver, but make sure you have followed the process and have discovered their unique and specific problems.

What do you think is a better way to start a call:

1. "*Tell me more about what your child is experiencing at school so I can share how Scholars can help.*"
2. "*What is your schedule like this week?*"

You'd be surprised how many people ask for a phone number or email address before asking the first question above. Many people never ask the first question (or something similar) at all. If you do, the parent/guardian will give you a list of reasons why they need to attend Scholars that you will remind them of when it's time to schedule them for their complimentary assessment or trial hour. For each issue they raise, the objective is to expand each issue so they feel a greater sense of urgency to move forward and enroll. If you are perceived as a truly valuable resource, prospective clients will want to talk with you about their issues, problems, and concerns - because they want valuable recommendations and solutions.

People love to talk about themselves and issues that are important to them. Using these techniques, you can help potential clients satisfy their own needs by engaging them in more productive conversations.

Greater needs increase the sense of urgency. Emphasize the importance of rectifying the problem. Allow people to explain the misery of the problem. Don't just jump in and fix it.

This is being customer-centric vs. self-serving, as we listen to the problem first.

While we have gone through a few pages of ideas here, at the end of the day, there are three words you need to know when working through the inquiry to the enrollment process. The same three words that will determine your success:

competence ***credibility*** ***value***

Psychology of Pricing

People tend to spend more when it is important. What is more important than a child's future to a parent/guardian? Nothing. For this reason, ***discounts and deals cheapen our offering***. Sure, there is a time and a place for rewarding loyalty and understanding the investment involved if one family is sending three of their children to your location. However, keep in mind that news travels fast and soon enough, everyone in your location will know who is paying the lowest and will come to you requesting a discounted rate since they heard someone else is getting that rate.

With the involvement you will have in your community, we want parents/guardians talking about us, just not to compare their monthly fees. If you are offering discounts to get people in the door, then you need to do a better job of understanding our program and solution, and explaining its benefits to increase the value by the parent/guardian. If you know this chapter front to back, many parents/guardians will not even ask the cost as you have demonstrated the immense value we will add to their family's life.

Best Practices:

- We suggest ending the conversation with your price so there are no surprises and using an even number.
  - No pennies, and definitely not ending in ".99". They are not buying a used car here, and this approach cheapens our offering and you will come off as a tacky salesperson.
- Based on our experience, when a location has a low closing percentage, their first reaction is, "I need to lower my price".
  - This is incorrect. You simply need to reflect on how you can communicate our offering in the best way for families in your community. From speaking with locations who charge the highest rates in our system, you will find that often their parents/guardians do not even ask the price as they know the Scholars Solution is one that their child cannot live without.
  - Monitor your success rate using your KPIs in IQ, particularly your closing percentage. The lower it sits, the more opportunity there is for improvement.

At Scholars, we are the best at what we do. We are a premium offering and people expect to pay a premium price. Never do yourself, or the brand, a disservice by offering discounted rates simply because you do not take the time to engage with the parent/guardian to focus on their problems before moving on to the Scholars Solution

Local Marketing

Local marketing is an essential component of Scholars Must-Have Systems: The Marketing Machine. The Marketing Machine functions with maximum efficiency when it receives all the necessary parts and services to operate smoothly.

Your Scholars marketing combines digital marketing — run through Scholars Head Office and managed by Northern — with traditional and community marketing initiatives. Neither piece can operate alone.

The following local marketing initiatives are a shortlist of best practices to serve as a reference guide when building your quarterly local marketing plan. The rhythm and frequency of your location's local marketing efforts will certainly dovetail with the seasonality of the school year calendar and the annual community events calendar.

Local Marketing Investment

Every location shall invest the **greater of 5% of gross revenue or $15 000 in local marketing per year** as per their Franchise Agreement.

$753.99 per month is pre-allocated for Scholars digital marketing program, leaving a minimum of approximately $5 952.12 per year (or $1 488 per quarter) of additional minimum local marketing spend. All local marketing investments are noted in the Monthly Franchise Report submissions for the month in which the initiative was paid for.

Note: *Although $15 000 is the total minimum annual local marketing investment for each location, we strongly recommend investing substantially more into "boots on the ground" local marketing efforts in a location's first year of operation, as building brand awareness in a new community is essential to long-term success!*

Brand Pillars

Understanding our brand is essential to creating marketing collateral that is both valuable and effective in connecting with your local audience. In a franchise model like ours — where each location operates independently but shares a common identity — brand consistency is even more critical.

At Scholars, we are stronger together.

This principle applies not only to our marketing and social media efforts but also to our programming, customer experience, and even the layout of our spaces. Clear and consistent cohesion across the system reinforces credibility, professionalism, and trust.

Next, let's review our marketing **brand pillars** — the foundation of our brand's marketing identity. For further details about our brand guidelines, please refer to the *Marketing Guide* in IQ's Internal Server Documents > Marketing - Marketing Guide and Resources..

Our Purpose	• Scholars fosters lifelong growth in ***academics, self-confidence, and self-esteem*** for all students.. • Our personalized tutoring services provide students with ***the support they often can't find in traditional classrooms***, which builds genuine confidence and measurable results. • What keeps us committed is seeing students ***unlock their full potential***.
Our Position	• Scholars is a ***premium*** supplemental education company that creates results that matter for students inside and outside of the classroom through ***personalized programming***. • Scholars claims the space where academic results meet individualized, ***relationship-driven support***. • Unlike mass-market tutoring services, we offer customized learning plans taught by caring teachers, ensuring students not only improve their grades but also build ***lasting confidence, skills, strategies, and habits***. • Our competitive edge lies in measurable outcomes backed by genuine care, our ***Enrich, Enhance, Extend*** pedagogy, and regular communication with parents/guardians and classroom teachers.
Our Personality	• If Scholars were a person, we'd be the ***encouraging, knowledgeable mentor***: warm, approachable, and deeply invested in each student's success. • We speak with clarity and confidence, striking a balance between professionalism and genuine care, always aiming to make families feel ***supported and empowered***. • Our style is ***clean, modern, and inviting***, reflecting our belief that learning should be both purposeful and positive.

Our Perception	- When we're not in the room, parents/guardians and students will describe Scholars as ***reliable, results-driven, and genuinely caring.*** - Families see us as a ***trusted partner*** in their child's academic journey, delivering real progress. - The impression we leave is that we ***go beyond tutoring***; we build confidence, consistency, and connection with our students and the community.

Resources for Strategic Planning: Annual Marketing Planner & Social Media Content Calendar

In your *Yearly Strategic Plan Hub* template document found within the Scholars Google Drive Documents folder, you will find the *Annual Marketing Planner* tabs where you will find detailed steps about how to execute sample initiatives within each marketing bucket along with a *Social Media Content Calendar* tab.

These resources will help you plan, organize, reflect, and be efficient with the specifics of your local marketing plan associated with the Scholars Must-Have Systems: The Marketing Machine, which is connected to your overall *One-Page Plan*.

The 4+1 Strategy

The first four marketing "buckets" of the "4+1" marketing strategy should be implemented ***at least once every quarter***. In contrast, the fifth column, ***localized social media***, should be implemented ***two to three times per week*** to engage your community beyond Head Office's posts. Details about each of these buckets are described in detail further in this chapter.

1 Additional Signage	2 "Print" Collateral	3 "Active" Community Events	4 Community Connections	+1 Social Media
At least one new initiative in each bucket each quarter				*Ongoing*
★ Roadside Curbex ★ Sandwich board ★ Outdoor benches ★ Bus shelters ★ Digital boards ★ Rink or arena boards ★ Car wraps	★ Postcards ★ Door hangers ★ Newspaper/ Magazine ads/Articles	★ Fairs & festivals ★ Merchant/ plaza nights ★ Group-led business networking events ★ Workshops ★ Open Houses	★ Sports team sponsorships ★ School club sponsorship ★ Community Action Drives ★ Volunteering ★ Scholarship giveaways	★ Use the four content pillars to create social media posts that show the locally owned and operated aspects of your location.

Seasonality

As you are considering the initiatives for each bucket, consider the following questions and the seasonal timeline:

- What is the goal/purpose of your marketing?
- What is the cost/benefit of each medium?
- Is it direct or indirect marketing?
- Is it active or passive marketing?

Back-to-School	Progress Report Cards & "New Year"	Final Report Cards & "It's Not Too Late"	Summer Learning
AUG / SEPT / OCT	NOV / DEC / JAN	FEB / MAR / APR	MAY / JUNE / JULY
Themes • Back-to-school momentum • Confidence-building • Preparation for progress reports	Themes • New Year goals • Mid-year progress • Report cards • Holiday break supports	Themes • The "final push" of the school year • Exams • Habit-building	Themes • Skill retention • Routine • Flexibility • Academic confidence • Preparing for the best start to the next school year
*Look for Marketing Guide Codes: **E, FA***	*Look for Marketing Guide Codes: **E, WI***	*Look for Marketing Guide Codes: **E, SP***	*Look for Marketing Guide Codes: **E, SP***

Additional Signage

Aside from your unit signage, an additional form of signage, displayed every quarter, has been proven to drive awareness of who we are and what we offer. The additional signage also provides an opportunity to promote your name in other areas of your community.

- Sandwich Boards
- Roadside Signs (Curbex or other)
- Digital Boards (Out of Home) - i.e. community centre, mall/plaza signage
- Community Buildings: banners, arena boards, etc.
- Outdoor Benches and Shelters
- Buses
- Billboards
- Car wraps

The two most popular choices for locations system-wide are ***sandwich boards*** and ***roadside signs*** as additional signage. Here are the steps to acquire these pieces:

<u>Sandwich Board:</u>

- [ ] Verify with your landlord/property manager that you are able to have a sandwich board on your sidewalk, and if there are any restrictions.
- [ ] Purchase your sandwich board.

- [ ] **TIP:** The WindPro Heavy Duty Snap Edge Sign - 24” x 36” - Black from ULINE is highly recommended for its durability and low poster cost. With other non-weatherproof sandwich boards, you may save on the initial unit, but there is a greater expense for plasticore material for the poster itself rather than traditional poster paper.
- [ ] Submit a Marketing Request Form with your poster dimensions, selected image, header 1, and header 2.
    - [ ] **TIP:** Remember, seasonal messaging every quarter works best! To determine which messages are most relevant to the season, refer to the Marketing Guide Codes in the seasonality chart above. Though template designs are available in the Marketing Request Form, feel free to request additional customization as required.

- [ ] Send the production-ready location-specific print collateral you received from the Scholars Marketing Team to a print vendor of choice: local print vendor, Staples Print Shop, VistaPrint, etc.
- [ ] Install the poster into your sandwich board and have it outside your location for the entire time you are open.

<u>Roadside Sign:</u>

- [ ] Verify with your landlord/property manager that you are able to have a roadside sign on a grassy roadside portion of the plaza’s property. Confirm if there are any restrictions - i.e. length of time, location, etc.
- [ ] Source a local vendor for the roadside sign. Most vendors will offer assistance on location strategy and municipal permitting (if applicable).
    - [ ] While there are many types of roadside signs, a mini-billboard style, like those offered by companies like Curbex, have been proven to have the greatest impact and ROI compared to magnetic/slide letter signs or lawn signs, which portray a lower-value offering that falls out of line with our premium product.
    - [ ] Submit a Marketing Request with the roadside sign dimensions from your selected vendor. Choose your image and headers.
    - [ ] **TIP:** Remember, seasonal messaging every quarter works best! To determine which messages are most relevant to the season, refer to the Marketing Guide Codes in the seasonality chart above.

- ☐ Send the production-ready location-specific collateral you received from the Marketing Team to your selected signage vendor. The vendor will then handle the printing and installation in-house and deliver the signage to the selected area in your plaza.

"Print" Collateral

This category works in tandem with your other "buckets" to get multiple visibility points within your community. Rather than the traditional "print" of newspaper ads, consider other ways to get your name and product offering into your community.

Collateral, such as postcards, door hangers, "feature speaker" newspaper/magazine articles, library bookmarks, and the like, is a great way to complement your other local marketing efforts.

The most popular choice for locations system-wide is direct mail campaigns using our branded postcard templates. Here are the steps to execute this campaign:

- ☐ DRMG is a preferred vendor that Scholars has used multiple times for direct mailpostcard campaigns.
  - ☐ DRMG works with locations to select preferred demographics in your territory (e.g. family size, household income, etc.). The company then handles the printing in-house and distribution via Canada Post outlets.
  - ☐ Alternatively, you can select a separate print vendor for the postcards and then handle the demographic and order work with Canada Post directly, but an all-in-one solution like DRMG is the most efficient.

- [ ] Submit a [Marketing Request Form] with your postcard dimensions and any other print requirements from your selected vendor. Though postcard templates are available on the Marketing Request Form, feel free to request additional customization as required.
    - [ ] **TIP:** Remember, seasonal messaging every quarter works best!
    - [ ] **TIP:** The 5” x 11” postcard size is a great choice because it stands out and is viewed as a modern and premium collateral size. The Pathway Postcard (shown below and available in the Marketing Request Form) is a very popular choice as it summarizes the middle insert of the Parent Guide in a simple and engaging way.

“Active” Community Events

These in-person events in your community help drive brand recognition and build partnerships. They are also the perfect way to be seen as a brand ambassador and a trustworthy resource for education in your community.

Some events to consider:

- Community Fairs and Festivals: Participate in events such as RibFests, local fairs, street fairs and extra-curricular sign-up nights to connect with families in the area

- School Fairs & Festivals: Participate in school fairs to interact with students, parents/guardians, and educators, showcasing the location's educational programs and highlighting the benefits of academic enrichment
- Merchant/Plaza Nights: Join 'Open Doors' events and collaborate with other businesses in the area to create a vibrant and inviting atmosphere for the community
- Business Networking Groups: Engage with the Chamber of Commerce, BIA, and other professional groups to expand your network and establish meaningful connections within the local business community
- Municipalities and Townships: Partner with local municipalities, townships and neighbourhoods to contribute to community initiatives
- Create-Your-Own Event in your plaza: Organize tailored events within your plaza, incorporating interactive activities and informative sessions to attract community members and promote a sense of inclusivity
    - E.g. Slices of Scholars pizza night, book exchange days, LEGO building contests, Scholars awards celebration, etc.

The most popular choices for locations system-wide are fairs and festivals. Here are the steps:

- [ ] Research available events on your neighbourhood community websites, social media pages, and business association pages.
- [ ] Fill in the required registration form and submit payment (if required).
- [ ] Many events like this will require you to provide them with proof of insurance to attend. Additionally, the organizing committee/township/etc. may require themselves to be added as an additional insured. If this is required, submit a Help Desk Ticket requesting an amended Certificate of Insurance.
    - [ ] In the Help Desk Ticket, please include the name and date(s) of the event <u>and</u> the full name and address of the additional insured party <u>at least seven business days prior</u> to the insurance certificate deadline.
- [ ] Prepare the following three items:
    - [ ] Branded Material: event gear, prominent signage, and print collateral
        - [ ] You can request to borrow a tent and/or tablecloth from Scholars Head Office via the Marketing Request Form <u>or</u> submit the Marketing Request Form to order your own tent, tablecloth, rollup banner (an example

from the *Marketing Guide* is shown here), etc. If you do not have a vendor already in mind, the Marketing Team can offer suggested vendors based on the collateral.

- ☐ Order your personalized event gear <u>at least two weeks before</u> the event.

- ☐ Submit Marketing Request(s) for branded print collateral to hand out. The Pathway Postcard and/or the Complimentary Assessment Postcard (shown below) from the *Marketing Guide* are a perfect fit!
  - ☐ **TIP**: It's always wise to keep a stock of these on hand so you can jump at a last-minute in-person event.
  - ☐ Send the production-ready location-specific print collateral you received from the Marketing Team to a print vendor of choice: local print vendor, [Staples Print Shop](), [VistaPrint](), etc.

- ☐ The Draw: exciting activity
  - ☐ Coordinate something that draws prospects to your table - think balloons, face-painting, popcorn, yard games, spin-the-wheel, etc. By drawing students (and their accompanying adults) to your table, you get an opportunity to capture a few moments of connection.
    - ☐ Source a local vendor to provide the service, rent the items from, or purchase items to be used again for future events.
- ☐ Getting the Info: lead collection method
  - ☐ Now, you won't have enough time at this event to have a full "inquiry" conversation and demonstrate how Scholars can help their family specifically. Having a giveaway basket filled with a seasonal or event theme, or a guessing jar game, is a great way to capture prospect information to follow up with after the event. You will find ballots for these events in IQ's Internal Server Documents > Marketing/Operations - Lobby & Community Event Activities.
    - ☐ After the event, you will enter all leads into IQ and send post-event follow-up emails to families.

Community Connections

In today's socially conscious environment, employees and customers place a premium on working for and spending their money with businesses that prioritize corporate social responsibility. It is imperative as a business owner to be actively involved within your community and to give back. The initiatives you choose to participate in must align with yours and the location's core values. Similar to “active” community events, community connections demonstrate your interest and direct involvement in and support of student-based activities and needs in your community.

- Sports Teams: Sponsor local sports teams, not only as an investment in the community but also as a way to connect with current and potential clients.
    - **TIP:** Submit a Marketing Request Form to receive a personalized file so you can add the Scholars logo on the back of the jersey.
    - **TIP:** Don’t simply make a passive donation - get involved!
        - If they are having a year-end tournament, plan to attend and ask to set up a small table. At the very least, order some branded swag - like water bottles from a promotional vendor like 4imprint - to give to the team.
- School Clubs: Establish meaningful connections by supporting school clubs such as STEM, robotics and chess. This is particularly impactful when engaging with schools where we aim to enhance our presence, focusing on programs that naturally align with the Scholars offerings.
    - **TIP:** Same as with sports teams, find a way to get involved further. Do they have a final competition day? Take some branded swag for the group and cheer them on!
- Community Action Drives: Take part in drives for essential items, including food, books, and back-to-school backpacks. During the holiday season, contribute to the spirit of giving during the holidays by participating in initiatives like Toy Mountain. These efforts go beyond monetary donations, emphasizing your commitment to the well-being of the community.
    - **TIP:** This is a great way to connect with other local businesses. Team up with the manager of your closest grocery store or Walmart and find a Saturday to set up outside their store to collect donations.
- Volunteer Engagement: Actively volunteer for community activities, such as gift wrapping, managing drop-off locations, and providing distribution support. This hands-on involvement demonstrates our dedication to positively impacting local events.
    - **TIP:** Be sure to be a “walking billboard” at these events by wearing some of your Scholars-branded gear.

Additional Local Marketing Opportunities

There may occasionally be marketing opportunities that do not explicitly fall within the 4+1 marketing buckets, but that does not mean that they shouldn’t be considered in your overall local marketing plan!

These initiatives include, but are not limited to: personalized radio ads, email marketing, referral incentive programs, etc.

Social Media

Your social media presence is an ongoing commitment to connecting with your local community through Instagram and Facebook in a way that complements and reinforces the other four marketing buckets at all times of the year. As a Scholars franchised location, your role in building and maintaining your location's online presence is just as important as ours at Head Office. While we work together toward shared goals, it's essential to understand how our responsibilities complement one another.

Here's how we divide the work:

- **Head Office:** We create system-wide content designed to keep your channels active and maintain consistent visibility. These posts are announced in advance in *The Scoop*, allowing you to plan and align your local content accordingly.
- **Each Scholars Location:** You are responsible for generating localized content that reflects your unique presence in the community. This authentic, community-driven content helps build trust and relevance at the local level.

Posting Goal: Aim for one post per day, combining both Head Office content and your own local contributions to create a dynamic, engaging feed.

Content Strategy

Instagram and Facebook are key tools for community building. On social media, you can accumulate interest from new leads and build loyalty in current students by showing them the value of our services, getting them excited about upcoming events, and providing them with a "peek behind the curtain" at the experience of the Scholars classroom.

In addition to our brand pillars, every location should be guided by our social media **content pillars** — four overarching themes that give your social media strategy both structure and intention. These pillars ensure that our content stays consistent, engaging, and aligned with both our business goals and our audience's interests.

The optimal framework includes:

- **Two sales-focused pillars** to highlight programs, promotions, and drive conversions
- **Two community-building pillars** to create connection, build trust, and humanize your brand

Using content pillars alongside our core brand pillars is essential for planning content in advance, staying on message, and creating a well-balanced feed that serves both your business and your audience.

Keep in mind that not all content will fit neatly into a single content pillar — many posts will naturally overlap categories, and that's okay! The key is to maintain a healthy balance between sales-driven content and community-building content.

If your feed is overly focused on promotions, it can start to feel transactional. Your goal is to create a social presence that your audience genuinely *wants* to follow — because the content is engaging, informative, and relevant to their needs. When your posts consistently offer value, trust grows—and so does the likelihood of meaningful conversions.

Content Pillars

Sales Focused	**Convince**	• "Hard sales"
		  ○ Showcasing our services, text-based calls to action, and direct sales content
		  ○ The most straightforward content to create, focused purely on conversions, designed to anticipate and overcome objections

	Excite	• "Soft sales"
		  ○ Location updates, collaborations, upcoming events, awards, and exciting announcements
		  ○ Brand-centred but not explicitly pushing sales

Community Building	**Relate**	• Relatable or entertaining content aimed at building community through common experiences.
	Educate	• Value-driven educational content aimed at building credibility and brand authority (e.g., related to education, school, accessibility, study habits, etc.) .

Content Examples

Not sure where to get started? Start with some of these replicable ideas:

Convince	Excite	Relate	Educate
Vary your content pillars so that no two pillars are posted back-to-back.			
★ Parent/guardian testimonials ★ Student success stories (i.e. a narrative-driven video campaign addressing specific pain points of a student, ending with a strong call to action) ★ Why Scholars? Side-by-side carousel of Scholars versus a generic tutoring solution ★ Special seasonal offerings (e.g. accelerated summer program, LEGO STEM summer camp, etc.) ★ Q&A video with tutor about the Scholars Solution ★ Positive reviews ★ Direct calls-to-action	★ Event photos and videos ★ Contest winners ★ Lobby campaigns ★ Featured manipulatives ★ Announcement of upcoming events, partnership with local businesses, or charities ★ Video highlights from Scholars classroom with exciting manipulatives and smiling students ★ Program updates ★ Announcement of milestones hit (e.g. number of students tutored!) using a branded graphic with a celebratory tone ★ Behind-the-scenes clips from a real tutoring session	★ Scholar of the Month ★ Teacher of the Month ★ Causes and community connections ★ Motivational quote of the week ★ Viral trends ★ Back-to-school nerves are real! Have you ever felt this way? Comment below! ★ What makes a great tutor? Five top qualities we hire for!	★ Video overview of tests like the IELTS (i.e. What is it? What does it take to pass? How do you prepare?) ★ Graphic overview of the “summer slide” ★ Provincial curriculum updates ★ Five warning signs that your child is falling behind in school ★ Ten research-backed tips for improving study habits at home ★ Tips for multiple-choice tests ★ Book of the week ★ Word of the day ★ Word problem of the week ★ Educational video series based on a Scholars blog post

Social Media Resources

- *Social Media Content Calendar*
    - In your *Yearly Strategic Plan Hub* template document found within the Scholars Google Drive Documents, a *Social Media Content Calendar* that can be used with your team - sometimes locations will even have a creative teacher help with an additional 30 minutes to an hour each week - to plan out content days and weeks in advance. By having a team member block off some time each week to develop the posts in advance, you will be prepared to post these quickly and easily throughout the week.
- Marketing Request Form
    - Use the Marketing Request Form to request design for your social media posts (template or custom, e.g., Google Review template for Instagram, etc.).
- Instagram Highlight Icons
    - Graphic icons for your Instagram story highlights are available in IQ's Internal Server Documents > Marketing - Marketing Guide and Resources.
- Instagram Stories
    - Pre-made Instagram stories for FAQs can be found in IQ's Internal Server Documents > Marketing - Marketing Guide and Resources.
- *Marketing Guide*
    - The *Marketing Guide* found in IQ's Internal Server Documents > Marketing - Marketing Guide and Resources provides an in-depth overview of the Scholars design and language conventions.

Social Media: Important Reminders

- As an education company, we are judged more heavily than other service-based providers when it comes to spelling and grammar; therefore, it must be perfect!
    - Use a browser extension like Grammarly to double-check your writing!
    - This extends to student work as well (e.g. Scholars Apples and lobby campaigns)
- Hashtags aren't needed! If any, use minimal hashtags (maximum of three)
- Ensure posts are sized correctly for the platform; see the Social Media Dimensions Guide below
- *Do not post any proprietary content (e.g. curriculum documents or assessment materials)*
- Do not use any Scholars logos on posts that have not been submitted through the Marketing Request Form
- Ensure all featured students have signed the Media Release (in the Enrollment Form and all featured teachers have signed the Media Release in the Employee Handbook
- Tag your location or city in each post
- Remember to refer to your location as "Scholars of Location" – not "Scholars Location"
- Schedule your posts in advance using Meta tools within Instagram and Facebook

Social Media Dimensions Guide

Are you unsure about the best dimensions for Instagram posts, reels, Facebook videos, or stories? This quick guide breaks down the latest sizing best practices so your local content looks polished and professional.

Instagram

Profile Grid

- Current trend: Instagram is prioritizing vertical images, both in reels and in the feed.
- Profile grid: Instagram's profile grid now displays posts in a 4:5 aspect ratio, making vertical images more prominent.
- Recommended size: 1080x1350 pixels (4:5 aspect ratio)

Reels and Stories

- Recommended size: 1080 x 1920 pixels (9:16 aspect ratio)
- TIP: Keep key elements (text/logos) vertically centred to avoid being cut off by the user interface!

Facebook

Feed Posts

- Square format: Facebook's feed typically displays posts in a square format.
- Recommended size: Square images (1080x1080 pixels) (1:1 aspect ratio)

Videos and Stories

- Recommended size: 1080 x 1920 pixels (9:16 aspect ratio)
- TIP: Keep key elements (text/logos) vertically centred to avoid being cut off by the user interface!

In summary, by requesting both a vertical (4:5) and a square (1:1) version of your graphics, you're prepared to post to both Instagram and Facebook, ensuring your content looks great on both platforms! Templates for each of these sizes are available in the Marketing Request Form.

Editing: Best Practices

Images

- Use the Marketing Request Form to request your design *if* a logo or stock photo is required.
- Refer to the Social Media: Dimensions Guide above.
- Avoid filters and unnecessary text overlays.
- Refer to the *Marketing Guide* for additional brand guidelines (e.g., brand colours and fonts).

Videos (Reels)

- The hook: Get to the point quickly!
  - Rather than including a lengthy pre-amble to your videos, keep audience attention by diving right into the content.
- Avoid filters and transitions
- Write in sentence-case
- Balance audio with music
  - For clarity, avoid music unless absolutely necessary.
- Place captions in the middle of screen to avoid the user interface (UI); white captions are preferred
- Request a customized end screen on the Marketing Request Form

Remember that everything you post online is a representation of you, the brand, and what you are able to offer. As an education company, we are judged more than anyone else on proper language conventions. As such, ***please pay close attention when reviewing and editing your posts before publishing*** to ensure you are presenting the best depiction of the quality of our service. A Grammarly account is a great tool!

"The Rule of 7"

By consistently engaging in this "4+1" local marketing strategy, you will ensure that your community recognizes and understands the brand and offering. This is based on the marketing fundamental "The Rule of 7". This philosophy is tried and true across various product and service models, and suggests that consumers need to see an ad at least seven times before they're ready to make a decision. In our modern world, this rule is less about "ads" and more about "touches" and impressions.

These impressions are different forms of interaction that your audience encounters across several different avenues. They're not necessarily the same every single time, but rather seven similar messages and interactions. After seven "touches," prospects likely have enough information to be ready to inquire about our service. We have seen time and time again that the highest-quality touches and impressions are through ***interactive and engaging efforts*** in the community.

1. Repetition is key:
   - Most customers will not be ready to engage and inquire with you after a single "touch" - or even two or three. Therefore, messaging needs to be repeated several times.
   - In a world flooded with brand messaging, our brand is just one of the many voices vying for attention. To cut through the noise of other brands, our audience needs to be told the same story repeatedly since humans are naturally drawn to patterns.

2. Keep it consistent:
    - These repeated “touches” aren’t effective if our audience can’t identify who they are coming from or what our core offering is.
    - As part of a franchise, you have the power of a brand with 25 years of providing excellence in education to thousands of families behind you compared to Roger’s Tutoring.
    - This is why the Marketing Team works tirelessly to maintain our brand’s identity - whether it be colours, fonts, imagery, or language - to keep telling the same story and be highly recognizable whether you are in a well-developed territory or a new market.

3. The simpler, the better:
    - Simple messaging is not only easier to repeat—it’s easier for our audience to understand. Complicated messaging requires our audience to use more calories to process.
    - In our templates and taglines, we can address a pain point, position ourselves as a solution to that pain, and provide a call to action.
    - By the time a customer sees our messages seven times, they have a good idea of our story and how our solution connects to them.

4. Use multiple avenues:
    - Getting to seven “touches” is much easier than it used to be with the diverse avenues available for local marketing. Filling each “4+1” bucket at least once every quarter allows you to reach the same audience in various ways, which amplifies your recognition in your community.

5. Every piece doesn’t need to be “new”:
    - When well into the “4+1” strategy, you can sometimes feel like you are generating “stale” content because of the repetition of images, taglines, and messaging. However, it’s important to remember that our audience views our content differently than we do.
    - We are “overexposed” to our brand, which cannot be said about our lead prospects. When deciding on the content for your marketing initiatives, continuing with the same batch of seasonal messaging throughout each piece will only provide consistency and repetition.

6. “7” isn’t set in stone:
    - Unfortunately, there is no magical guarantee that a prospect will be ready to engage and inquire after seven touches. Some customers may take four, and others may take sixteen before they are ready to become customers.
    - The importance of “The Rule of 7” isn’t the number itself but the idea of repetition, consistency, and diversification.

Chapter 3: Marketing & Community Connections

Our audience has many supplemental education brands vying for their attention constantly. When you make an effort to communicate with your audience in a way that addresses their needs and uses clear and consistent language, you'll stand out from all the noise. You will gain customers if you know your audience, communicate with them clearly and repeatedly, and address how Scholars can meet their needs!

Marketing Requests & Marketing Guide

The Scholars Marketing Team is here to support your marketing efforts through the Marketing Request Form. As noted in every location's Franchise Agreement, all material that contains the Scholars logo must be created and/or approved by the Marketing Team. To ensure brand consistency across our network, the team has developed a handy *Marketing Guide* that can be found in IQ's Internal Server Documents > Marketing - Marketing Guide and Resources. This guide provides photos, taglines, templates, best practices, as well as our commitment to returning your collateral promptly.

Note: When submitting your requests to the Marketing Request Form, the Marketing Team may make some modifications to match our brand standards and language. For example, our brand language is "Scholars of Location" rather than "Location Scholars" and we choose language that reflects our premium brand, such as "complimentary assessment" rather than "free assessment."

Community & School Connections

At Scholars, we know that student success is a team effort. By fostering strong relationships with our community, including schools, school boards, and parent councils, we create a supportive learning community that bridges the gap between in-school and out-of-school learning and supports the "whole child". These connections allow us to better understand curriculum expectations, align our strategies, and advocate for the needs of our students.

One of the best ways to build these relationships — and grow our presence in the community — is by ***sponsoring or participating in school events***. Whether it's a barbeque, literacy night, career fair, fundraiser, or sports tournament, school events provide valuable opportunities to engage directly with students, parents/guardians, and educators. By sponsoring, donating, or volunteering, we not only show our commitment to education but also increase brand visibility and trust among families and school staff.

"Getting In" with Schools and Parent Councils

Leverage your network of tutors, parents/guardians, friends, and colleagues to identify and connect with schools about upcoming sponsorship and donation opportunities. A small sponsorship or a donated prize (e.g., three complimentary tutoring sessions, a backpack full of school supplies, etc.) can go a long way in building goodwill and positioning us as a go-to resource for academic support. The stronger our presence in school communities, the more we reinforce our reputation as an integral part of student success.

Engage with school-affiliated Facebook groups and pages where PTAs often post updates, organize events, and welcome community partnerships. Reaching out directly to school staff through ***Facebook, email, LinkedIn***, or via ***Team Approach Agreement*** conversations. Attending school board or PTA meetings and volunteering at events are also great ways to establish relationships that can lead to long-term collaboration.

Let's make the most of these opportunities and continue growing our impact — one school connection at a time!

Best Practices

Leverage your Network: Find your "Entry Badge"

When approaching a new contact, always build credibility in your communication with schools by ***describing your direct connection to the school***. Sending generic emails to a publicly-available email address is like knocking on a locked door without a key. Think of your connection as your "entry badge" to gain you access to the next stage of the consideration process.

Leverage:

- ★ Tutors
  - *"One of my incredible teachers, Miss Abby, often works as an Occasional Teacher at your school"*
- ★ Parents/Guardians
  - *"One of my student's parents, Megan Smith, brought your upcoming book fair to my attention."*
- ★ Metrics
  - *"There are 10 students from your school who are currently enrolled at Scholars of Location and we're only continuing to grow each day!"*
- ★ *Team Approach Agreement*
  - Use your touchpoints with the *Team Approach Agreement* to build rapport with local teachers.
    TIP: Although the purpose of these meetings is to gather information about specific student needs, communication over time may move towards involvement in school events and fundraisers.

★ Consider your FRANKS List

Messaging: Giving Back!

Instead of cold-emailing schools with promotional offers, we focus on giving back through donations, sponsorships, and active participation in school events. By ***approaching schools with the mindset of contributing***, we build trust and establish ourselves as a valued partner in education

- Emphasize:
  - “Give back to the community”
  - “Sponsorship, donation, and event-participation opportunities”
- Avoid:
  - “Certified vendor” and “marketing”
- The more specific, the better!
  - If you are aware of an upcoming community event or fundraising initiative, call it out by name (e.g., Terry Fox Run, book fair, fundraiser for new outdoor equipment, etc.)

Sample Email: Fundraising and Sponsorship Opportunities

Good afternoon [Name],

Mr. Carter shared with me that your school is participating in a fundraising initiative for the Terry Fox Foundation next month. Cancer research is a particularly inspiring cause for us, so we would love to help out in any way that we can!

Are you seeking additional sponsors for your upcoming Terry Fox Run event?

For some additional context, Scholars is a supplementary education service that has been supporting students from K-12 with personalized tutoring and mentorship services since 1999! Our team at the Scholars of [Location] has been working closely with students since [DATE], and we’ve been seeking opportunities to give back to the hardworking students and parents in our area.

Would you be available for a quick call next week to discuss how we can support your fundraising initiatives? (e.g., Donation of prize vouchers, active event participation, direct sponsorship, etc.).

Yours in Education,
[Director Name]

Inquiries

How do you convert a lead to an enrollment? ***Connect with parents/guardians through a genuine conversation and show that we truly care about helping their child reach their full potential!*** The desired result of this initial touchpoint is to book the assessment, benchmarking session, or trial hour.

Every lead - no matter the source - should be treated with urgency. In today's modern world, it's extremely easy for parents/guardians to inquire with multiple tutoring companies in a short period of time, especially with digital lead collections. Therefore, it's important that we are always picking up the phone every time that it rings and responding to digital inquiries as soon as they enter your inbox.

In many cases, the prospective client is working the "Tutoring Near Me" list on Google and calling or submitting digital requests to the entire list. If you miss picking up the phone or responding to an email in a timely manner, you've given your competitors the opportunity to scoop up the lead for themselves.

TIP: Whenever the phone rings or your inbox pings, think of it as a ***$2 500 cheque you don't want to miss!*** (This is based on a conservative estimate of a client enrolling for six months of sessions at a minimum of eight one-hour sessions a month at a rate of $50 per hour.)

Individualized Inquiries

Every inquiry is unique; there is no "one approach fits all" and no "one pitch or spiel convinces all". As you read in Chapter 2: Sales, a question-based approach that aims to listen to the ***problems***, understand the ***alternatives***, and offer the ***Scholars Solution*** is the only method that builds ***competence***, ***credibility***, and **value** between you and prospective clients. As a general rule of thumb, you want the client to be doing about 75% of the communicating and for you to remain an active and engaged listener throughout.

Types of Inquiries

There are four primary sources of inquiries:

- **phone call** (e.g., to the location's phone number or fielded through the toll free central line);
- **in-person** ("walk-ins" or while out in the community);
- **email**; and
- **e-leads** (e.g., website landing page submissions, Calendly, etc.).

Post-Secondary/Adult Learner Inquiries

While the majority of your client base will be from Pre-Kindergarten to grade 12, you may also find that you have post-secondary and/or adult learners inquiring. But, don't fear - the process is the exact same no matter the inquiry!

Some additional considerations:

- Oftentimes adult learners have increased flexibility compared to students who are in school; therefore, you may be able to utilize your location during daytime hours to accommodate adult learners.
- It is important to remember that many adult learners have not completed a course in some time, may have had a bad experience working in a classroom setting, and/or have low confidence in their academic capabilities. Remember to let them know that we have a vast amount of experience in helping adult learners.
- For some adult learners, they are looking to prepare for specialized tests or exams - i.e. SAT, ACT, IELTS, etc. It is critical to set appropriate expectations related to their goals, commitments, and timeline.

Best Practices for Phone/In-Person Inquiries:

1. **Friendly Greeting:** e.g., "*Scholars of Location, how may I help your child learn today?*"

2. **Ask and Listen**: Establish credibility and build rapport by asking diagnostic questions to determine the root problem driving the inquiry. These questions will help you decide the appropriate next step for the child (e.g., assessment, trial hour, etc.).
    - Use the *Inquiry Form* (IQ's Internal Server Documents > Operations - Enrollment Documents) to guide your open-ended questioning and note-taking: *"May I ask you a couple of specific questions about your child?"*

3. **Outline Relevant "Scholars Highlights"**: Review the investment-justification of the purchase *prior* to providing monthly tuition details. Remember: investment is *not* just from a financial standpoint - consider the time, money, and energy investment.
    - Determine which features of the Scholars Solution to mention based on the child's specific needs in parent-friendly language (e.g., Manipulative Shelf (enriching, enhancing, and extending a student's learning to bring the concepts to life), Mastery Criteria (every student's program is paced based on their specific needs), Scholars Store (motivation and engagement), ratios, conferencing/re-assessments, etc.).

4. **Outline the Next Steps**, including **booking the assessment, benchmarking session, or trial hour**, the post-assessment/trial hour/benchmarking session review, along with expectations of frequency, ratio, and monthly tuition.

5. **Input Lead** in IQ for follow-up.

6. **Send Follow-Up Email with Google Calendar invite,** summarizing the content of the call and reminding them of the appointment time and location.

Best Practices for Digital Inquiries:

For ***digital inquiries*** made via email or e-lead channels, including Calendly bookings, you should always ***connect via phone or email to confirm the appointment time and location, to collect more information about the child, and build rapport*** with the parent/guardian.

1. **Friendly Greeting:**
   - Phone: e.g., "*Scholars of Location, how may I help your child learn today?"*
   - Email: e.g., "*Thank you for your interest in Scholars of [Location] where we support students in catching up, keeping up, or getting ahead."*

2. **Ask and Understand**: Establish credibility and build rapport by asking diagnostic questions to determine the root problem driving the inquiry. These questions will help you decide the appropriate next step for the child (e.g., assessment, trial hour, etc.).
   - Use the *Inquiry Form* (IQ's Internal Server Documents > Operations - Enrollment Documents) to guide your open-ended questioning and note-taking:
     - Phone: e.g. *May I ask you a couple of specific questions about your child?"*
     - Email: e.g., *"At Scholars, every student benefits from individualized programming. To begin, may I please ask a few specific questions about your child."*

3. **Outline Relevant "Scholars Highlights"**: Review the investment-justification of the purchase *prior* to providing monthly tuition details. Remember: investment is *not* just from a financial standpoint - consider the time, money, and energy investment.
   - Determine which features of the Scholars Solution to mention based on the child's specific needs in parent-friendly language (e.g., Manipulative Shelf (enriching, enhancing, and extending a student's learning to bring the concepts to life), Mastery Criteria (every student's program is paced based on their specific needs), Scholars Store (motivation and engagement), ratios, conferencing/re-assessments, etc.).

4. **Outline the Next Steps**, including **booking the assessment, benchmarking session, or trial hour**, the post-assessment/trial hour/benchmarking session review, along with expectations of frequency, ratio, and monthly tuition.

5. **Input Lead** in IQ for follow-up.

6. **Send Follow-Up Email with Google Calendar invite,** summarizing the content of the call and reminding them of the appointment time and location.

“Keeping the Train on the Tracks”

While your first impression with a prospective client is crucial, It’s also important to consider that your initial inquiry touchpoint is not the only time you are going to be able to connect with a prospective client to learn more about their child[ren], build rapport, and establish your ***competence***, ***credibility***, and ***value***.

As such, when engaging in an inquiry conversation that is heading towards the desired result of booking an assessment, benchmarking session, or trial hour, don’t derail the conversation by asking subsequent questions. You will be connecting with them again soon and can ask any remaining questions at that time!

Touchpoint 1: Initial Inquiry

Desired Result: Book Assessment, Benchmarking Session, or Trial Hour

- The best measure of the success of an initial inquiry conversation is whether or not you were able to secure an appointment for the assessment, benchmarking session, or trial hour. If the prospective client is not ready to commit to this appointment right away, establish your follow-up process expectations.
    - **Digital Inquiries**: You should always *call to follow-up on digital inquiries* (e.g., to collect more information about the child, build rapport, and/or to confirm appointment time and location).
    - **Phone/In-Person Inquiries**: After booking the next touchpoint, send a follow-up email recapping your conversation along with a Google Calendar invite

Touchpoint 2: Assessment, Benchmarking Session, or Trial Hour

Desired Result: Enroll student and/or book an Assessment Review Meeting

- Before diving into the assessment, benchmarking session, or trial hour, give yourself the time to have the parent/guardian complete both pages of the *Student Information Form* (IQ’s Internal

Server Documents > Operations - Enrollment Documents). Consider this the “entry ticket” to the complimentary evaluation step before enrolling.
- Throughout this appointment, you must collect the data required for enrollment and personalized programming, convey the value of Scholars Solution, and build rapport with the parent/guardian and child.
- Ideally, you should **meet briefly with the parent/guardian immediately after the assessment, benchmarking session, or trial hour** to provide an overview of the student’s learning skills and observed performance in an effort to enroll the student immediately - ***capitalize on the urgency and the fact that they are already present with you.***
    - If the parent/guardian would like to see the assessment results prior to enrolling, book an Assessment Review Meeting as soon as possible to convert to an enrollment.
- Even if the student enrolls after the initial assessment, book an Assessment Review Meeting as soon as possible - or even at the beginning of their first session - to build rapport with the parent/guardian and convey the credibility of the Scholars Solution.

Touchpoint 3: Assessment Review Meeting or Benchmarking Session/Trial Hour Review Meeting

Desired Result: Enroll student and/or convey credibility and value of the Scholars program

- Assessment Review Meeting: in this meeting, you will present the student’s completed Assessment Record to the parent/guardian outlining the student’s academic skills demonstrated, along with observations about the child not found in the correct and incorrect answers, and the next steps for the student’s personalized programming.
- Benchmarking Session/Trial Hour Review Call: in this conversation, you will present the observations made during the session to the parent/guardian, along with the next steps for the student’s personalized programming.

Individualized Inquiries

Finding the “Root”

The most important aspect of any inquiry is to determine the root cause of their inquiry. This goes beyond simply asking what the client is looking for. If a parent/guardian states that they’re calling regarding math help, don’t just focus on math, ask follow-up questions regarding their language skills – especially reading comprehension. If they can’t understand what they’re reading, their math skills aren’t the root cause of their academic struggles. Demonstrate that you are ***invested in understanding the student as a whole***!

We're in the business of ***authentic connections*** and ***building relationships***; we just happen to do it by providing outstanding tutoring, mentorship, and supplemental education. Our focus should always be on the individual: to develop a student who is confident, independent, willing to take risks, and not be afraid to make mistakes - to name a few qualities. Our goal is to help children become autonomous thinkers and develop critical thinking skills — not just focus on their academics.

Highlight Features of the "Scholars Solution"

In order to convey value and credibility, our guiding-questions will help determine which features of the Scholars Solution will be relevant to share with each individual inquiry. It's important to note that not all of these highlights need to be shared during the initial inquiry conversations. Consider focusing on those that provide a "solution" to the student's "problem" and demonstrate the value of our programming.

For example, a parent who is speaking about their child being frustrated in class because they aren't keeping up with their peers (and are noticing this themselves) and are lacking engagement and motivation, would have the complimentary assessment, mastery criteria, and Scholars Store highlighted in their conversation, whereas a high school student who is achieving at a high level already and is looking into advanced placements likely won't be interested in hearing about the Scholars Store (despite them still earning points every session)

Complimentary Evaluations

No matter what program a student is enrolling in, every student receives a complimentary evaluation before beginning their first paid session. This complimentary evaluation type is determined by the program they are going to be enrolled in.

These complementary evaluations are *part of the enrollment*, not just a step to complete. While the information can help with the final conversion of a student, these evaluations should only be completed for clients who you have a good deal of certainty about enrolling rather than someone who just wants the information to take back to the school.

When booking any complimentary evaluation, it's important to give yourself some buffer time at the beginning and end of the evaluation so you can complete all aspects of the evaluation without you or the child feeling rushed, giving appropriate time to answer parent/guardian's questions, and sharing your initial observations with the goal of enrolling them before they leave.

See Chapter 5: Assessments for more information about our assessments, benchmarking sessions, and trial hours and their related processes.

Complimentary Assessment

The first step in creating any elementary reading, writing, or math program is completing a complimentary assessment. The assessment results allow us to construct an entirely individualized program that bolsters the student's academic weaknesses while leveraging their strengths. We use the assessment for all elementary students, whether they are looking to catch up, keep up, or get ahead. Not only is the assessment necessary to build the child's individualized program, but it is also a significant differentiator between Scholars and our competitors (i.e., not a "one-size-fits-all" solution).

Complimentary French Benchmarking Session

All students heading into French programs receive a complimentary benchmarking session. During this session, students will work on a variety of level-appropriate activities with a subject-specialist teacher to determine the student's introductory level of their programming, along with their strengths and areas for improvement in reading, writing, listening, and speaking in French.

Complimentary High School Trial Hour

For high school, students complete a complimentary trial hour. During this time, you and one of your subject-specialist teachers will determine more information about the student's strengths and weaknesses - not just from a purely subject matter standpoint, but also considering their skills, strategies, and habits. This session is an evaluation and opportunity to learn more about a student; it is not a homework completion session or a "free" class to get ready for a test coming up on Friday.

Scholars Competitive Edge

Conferences & Reassessments

We meet with parents/guardians after every 12 hours of instruction for an individualized conference. The conference is a time where we provide a report on concepts students have completed in the last 12 classes, what they're currently working on, and set goals and expectations for what they will be working on in the next 12 classes and beyond.

Every 36-hour interval for those students who completed an initial assessment, in addition to their conference, we also complete a reassessment to determine their progress since their last assessment. Not only does this allow us to make any necessary adjustments to their program, but it also demonstrates their growth to the parent/guardian. Many of our competitors offer a "one-size-fits-all" approach to learning, making our assessments and conferences a key competitive advantage.

Team Approach Agreement

Scholars believes in a Team Approach to working with each child. To that end, with parental consent, we will attempt to contact each child's classroom teacher and/or other educational professionals to discuss assessment results, programming, and steps moving forward to help them reach their academic goals. The Team Approach Agreement is a key competitive differentiator to leverage during inquiry calls. See Chapter 6: Assessment Review & Enrollment Meetings for more information about best practices for school communication.

Scholars Store

Scholars students get the opportunity to earn points each session, which they can redeem for prizes from the Scholars Store. Not only does the Scholars Store offer our students valuable lessons in goal setting, delayed gratification, and hard work, but it's also tons of fun! Discuss how the Scholars Store can promote strong learning skills while rewarding consistency and effort.

Manipulative Shelf

The Manipulative Shelf is a key aspect of our programming and the physical embodiment of our ***Enrich, Enhance, Extend*** pedagogy. We use physical manipulatives to engage our student's unique learning styles, apply learned concepts in various scenarios, and infuse our lessons with engaging activities. The Manipulative Shelf helps us separate ourselves from our competitors who focus on "kill-and-drill" worksheets to the detriment of student engagement.

Mastery Criteria

Unlike school – where the class moves on to the next unit regardless of an individual student's understanding of a concept – Scholars students do not "move on" until they are confident and competent in their understanding of a concept. "Mastery learning" is an instructional approach where educational progress is based on performance rather than time spent. Learners at Scholars are given multiple lessons about the same concept until they reach the required mastery level. At Scholars, no student is left behind!

Must-Have Expectatations

For all inquiries, it is critical to use a portion of your time to outline and establish expectations with parents/guardians to ensure that you are aligned on all fronts *before* they come in for a complimentary assessment, benchmarking session, or trial hour.

There is nothing worse than having a student complete a fantastic trial hour, only to be met with "Oh, this is too expensive. My budget is $20 an hour," when you discuss the next steps of enrolling their child into Scholars.

Frequency & Scheduling

All students who attend Scholars should begin with ***full-time enrollments per subject*** - i.e., attend a minimum of two one-hour sessions per week. Students who attend with this frequency see an ***average increase of one full grade level after 40 hours of sessions*** in the focused subject area. This frequency also maximizes retention, gives the best return on investment, and builds strong learning habits and routines.

Students who attend less than two one-hour sessions per week per subject are considered to be on a "maintenance" enrollment. Students who attend with this frequency will see limited marked gains towards their goals. Ensure that you manage expectations for parents seeking this solution; though these students will certainly still see some growth, the trajectory and return on investment will be considerably slower.

Most families prefer a schedule where the student attends classes on two different days that aren't back-to-back, such as Monday/Wednesday, Tuesday/Thursday, or Wednesday/Saturday. Non-back-to-back sessions will also result in the best progress results since the instruction is spread out over the course of a week.

We pride ourselves on being understanding, accommodating, and flexible with scheduling. Unlike other extra-curricular activities where there are limited days and times for basketball practice, swim lessons for their level, or other group-based activities, students can come to Scholars whenever we have available times and competent subject-specific teachers available! Ultimately, every student should receive a minimum of eight, one-hour classes every month to ensure progress.

Please review the make-up classes policy outlined in the Enrollment Form (IQ's Internal Server Documents > Operations - Enrollment Documents).

Teaching Ratios

At Scholars, we work in small student-to-teacher ratios - a maximum of 3:1 or 2:1 ratio depending on the program. This means that there are two or three students at the teaching table with one teacher. During the session, each student is on their own individualized program and receives individualized attention throughout the class as the teacher is connected to that table for the entire session as opposed to having teacher(s) roam around a room or hop between students.

Teaching in these small student-to-teacher ratios - i.e., not one-on-one - supports a student's development of their skills, strategies, and habits, including independence, problem-solving, and autonomy – essential skills for success outside the four walls of the Scholars space, whether that be in their larger-ratio classrooms at school or when attempting homework alone at home..

Program Ratios:

- For all GAP programs (grades 1-8 reading, writing, or math curriculum programs), the ratio is a maximum of 3:1
- For all French, LTT (high school), and Reading Readiness programs, the ratio is 2:1.

Ultimately, by the end of a student's time with us, we want to develop an independent student who can complete their work on their own, take risks, and not be afraid to make mistakes, which can only be accomplished in our small group ratios.

Tuition Rates

Tuition rates should always be presented as a monthly rate. If parents/guardians only hear the per-class rate, they often think of each class individually and are less likely to stay committed to the schedule and be reliable.

However, the first month is usually prorated based on the number of classes the student will receive since most students do not start at the very beginning of the month. This is the *only* time we prorate or work on a per-class basis.

Payment Tiers:

Many locations will develop payment "tiers" connected to the varying program types offered at Scholars, along with loyalty pricing for families or students who are enrolled in more than one full-time subject enrollment. An example of most common tier structure is:

- GAP/Reading Readiness: $55/hr - i.e., minimum $440/month based on recurring schedule
- LTT or French: $60/hr - i.e., minimum $480/month based on recurring schedule

- Sibling/loyalty pricing (minimum of 16 hours a month when enrolled in full-time programs) with the first student/program entered at the full hourly rate and then sibling/loyalty rate applied to the sibling or second program if being used by the same student. (Generally, about a 10% rate savings)

  - GAP/Reading Readiness: $50/hr - i.e., minimum $400/month based on recurring schedule
  - LTT or French: $55 - i.e., minimum $440/month based on recurring schedule

Payment Options:

All parents are on some form of pre-authorized payment method. As outlined on the Enrollment Form (IQ's Internal Server Documents > Operations - Enrollment Documents), the two approved forms of payment are:

- credit card, or
- pre-authorized debit (PAD) from their bank account

Do not provide any other options for payment. It is not worth your time chasing clients every month to collect cash, e-transfer, cheque, or on-site point-of-sale (POS) terminal payments.

Best Practices:

- Always process payments on the first of the month for that same month.
- Do not bill at the end of the month for the classes attended that month, or you will spend countless hours each month on billing, and clients will not respect scheduling, make-up, and payment policies.
  - Note: this best practice is also aligned with IQ's logic for many of its features and functionalities, including, but not limited to the Monthly Billing Report - i.e., variable monthly billing, billed at the beginning of each month

Next Steps

If you have had a successful initial inquiry, the next step before ending the conversation is to schedule the complimentary assessment for elementary reading, writing, or math students, a complimentary benchmarking session for French students, or a complimentary trial hour for high school students.

TIP: If the client is hesitant to schedule an assessment, benchmarking session, or trial hour, you can suggest they come for an on-site visit to see the location in action!

The Follow-Up Process: The "7-in-7"

As we discussed already in this chapter, from an initial inquiry, our desired result is to book an assessment, benchmarking session, or trial hour. However, that isn't always the case, and, as such, we must engage in a systematic follow-up process.

Certainly, we would love - *and maybe even expect* - to convert a client the first time we meet a prospective client. Yet studies reveal that only 2% of sales occur when two parties meet for the first time.

The 2% who commit after a first meeting tend to be people who have already looked into the subject matter, and already know what they're looking for. If they meet someone who ticks all the right boxes and they get on well, then business may well be transacted. But that is far from the norm. The other 98% will only buy once a certain level of trust has been built.

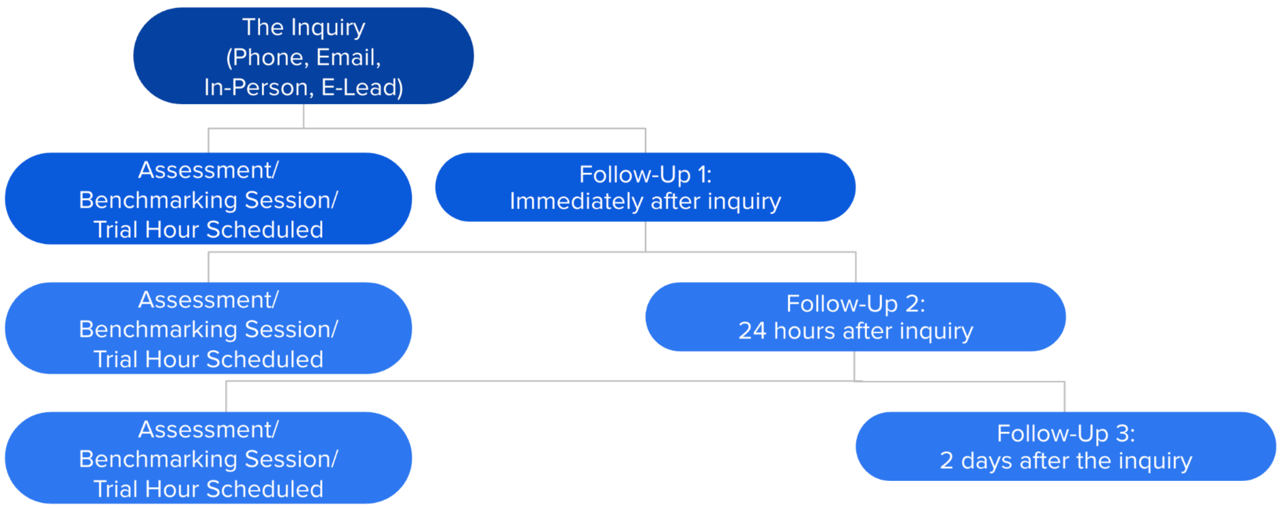
Anyone who believes they can go into a sales situation armed with '101 sure-fire sales closes' and make sales is seriously misinformed - and about 20 years behind the times. Our highest conversion-makers in the system are those who truly get to know their prospects, understand their problem and provide irrefutable proof that Scholars is the solution for their child[ren]. They build relationships and trust by engaging in ongoing dialogue (otherwise known as follow-up) rather than just peddling their products and services with an armoury of closing tricks.

The "7-in-7" Methodology

★ Follow-Up One:
  - In our most ideal scenario, after the initial inquiry, the assessment, benchmarking session, or trial hour has been booked, we will send a follow-up email as discussed in the Best Practices for Phone/In-Person Inquiries and Best Practices for Digital Inquiries above.
  - If a client has not committed to the assessment, benchmarking session, or trial hour, by the end of the initial inquiry conversation, we will also follow-up with an email:
    - outlining the summary of your conversation and the next steps;
    - including two-three available times in the upcoming days to book the assessment, benchmarking session, or trial hour;
    - along with expectations of frequency, ratio, and monthly tuition;
    - and setting the expectation for our next follow-up

★ Follow-Up Two:
  - Hopefully, from our follow-up the parent/guardian has now booked an assessment/benchmarking session/trial hour. However, if we haven't received that confirmation, we will follow up again the following day.
    - Perhaps this time via phone since our last connection was via email unless the parent/guardian has mentioned that email is the best form of communication.

★ And so on, as shown in the graphic below:



Best Practices

- Remember that the parent/guardian has reached out to you because they have a ***problem*** that they are looking for the ***solution*** to. Therefore, you following up with them shows your ***commitment to their child[ren]'s success.***
- Prepare for each follow-up conversation by reviewing the student's lead profile notes in IQ to ensure that you are providing ***personalized messaging*** about how Scholars can help *their* child[ren] rather than a "I'm just following up"-style message.
- While we refer to this process as the "7-in-7", if a parent shares that they need a few days to review the information with their partner, for example, then certainly we will move our next follow-up.
- Following through with your follow-up plan demonstrates strong integrity - doing what you say you're going to do - which is ***crucial for building trust and strengthening your credibility***.
- All follow-up communication touchpoints are to be logged into the student's lead profile in IQ.

Handling Objections

The more you understand *why* a prospective client might be hesitant to enroll, the better equipped you are to get them signed up right away. Don't let these objections become an obstacle to a conversion! Ask questions and show them a perspective they may not have previously considered.

TIP: Place a copy of the Quick Reference Guide: Handling Objections found as an appendix to this Playbook on the clipboard that holds your Inquiry Forms in your office.

1. Cost: *“That’s really expensive.”*

Price objections are the most common sales objection there is. Why? Because money is on top of everyone’s mind. But the price is all about perceived value. The number one tactic to avoid this objection from arising in the first place is to never begin the conversation by discussing price – focus on the parent, their pain points, and how your solution will benefit them.

Their opinion on your price all comes down to perceived value – make the ***value*** of your solution known before discussing the cost, and you will significantly minimize the likelihood of this objection arising.

When presented with this objection, emphasize features of the Scholars Solution that add value (e.g., our complimentary assessment, benchmarking session, or trial hour, our frequent conference reporting, our reassessments, our Manipulative Shelf, our Scholars Store, our low student-to-teacher ratio, etc.).

You can also ask the parent why they think that our solution is too expensive. The parent then has to break down their reasoning which gives you another insight into their perspective. Some parents may not understand the short- and long-term costs of maintaining the status quo. In order to break the status quo for this parent, you can highlight the costs of anxiety, being held back in future grades, not developing long-term study habits, and more.You can then address these issues specifically, which will lead the conversation in the right direction.

Sample Responses:

- *“Our prices are reflective of the personalization of our programs and student success across our network.”*
    - *“On average, students go up an entire grade level after just 40 hours at Scholars. That’s a year’s worth of learning!”*
- “*We want to prove to you why our program is the best and share the value we can offer to you and your child. That being said, can you tell me a little more about your child and why you think the solution is too expensive?*”
- *“What is the value of increased confidence, lower anxiety and transferrable study and problem-solving skills?”*

2. Affordability: *"That's out of my budget."*

It can be challenging when someone understands the value of the Scholars Solution, but states that the tuition is out of their budget. Meet these objections with validation and empathy. We do not minimize this objection by pretending that our programs are not considered to be expensive to some families.

Deals and discounts cheapen the brand, so if a parent legitimately cannot afford our services, then now may not be the right time for them to enroll with us, and we must leave the door open for them to enroll should their circumstances change in the future..

Sample Responses:

- "*I understand that Scholars is currently out of your budget. We would love to help your child when the time is right. Let's connect again in a couple of months to see if anything has changed.*"
- *"Is there anyone else in the family who can help pay for this tutoring? We know students who get help from grandparents, etc."*

3. Key Decision-Maker: *"I need to speak with my partner."*

Sometimes, the person you are talking to is not the only "key decision-maker" in the "purchase." In some cases, they may be procrastinating on making a decision and in others, they are simply the family member tasked with sourcing the information.

It will be quite apparent whether you are speaking to the decision-maker or not, especially when you begin speaking about the tuition, schedule, and commitment. It is important to present your solution to all of the people involved in making the decision to ensure everyone is on the same page.

Keep the process moving by offering to talk to all parties: Dad, grandparents, and maybe even their aunt. Getting all decision-makers in one room will help you have more control over the conversion and facilitate the decision, as you can present as much insight as possible. This is where you send that Google Calendar invitation to secure their time and attention.

Sample Responses:

- "*I understand completely. I will send a follow-up email outlining all of the information that we just discussed for you to share. I will also share some available days and times in the upcoming days for us to hop on a call or schedule an on-site visit for you all to come in for a meeting so we can discuss with your family.*"

- *"I'll send you a follow-up email with everything we just discussed. Then, I'll give you and your partner a call tomorrow after you've had a chance to go over the details together."*

4. Rushing: *"I don't have that much time right now. Just send me the information."*

This objection is one way of saying "this isn't critically important to me right now" or could be a sign that you haven't translated enough value of your solution. Use open-ended questions to get them talking about their child. If the parent/guardian does not engage, reschedule the call for a better time or invite them to the location to see our program in action! Emphasize that parents have found this in-location touchpoint to be an easier method of fully understanding our solution.

If the client shares that the reason they are rushing has to do with their child, use this to your advantage by showing how your solution could help ease their pain (e.g., building learning skills, developing routine, etc.). Our solution helps make their lives easier – this is a great time to emphasize that!

Sample Responses:

- "*I hear you - it's a crazy time of year! In order to provide you with some specific information for your child's personalized programming, can I ask you just three questions?"*
- "*I'd be happy to send you some information via email, but I'd like to ask you a few questions first to make sure I send you the most relevant information for you and your child."*
- *"Our families tend to find it valuable seeing the steps we take to get results in person. Would you be interested in coming in to go over everything? I have availability on xx and yy."*
- *"We know all about busy schedules! Our team at Scholars is well-versed in managing students who require schedule flexibility. How about I call you back at xx or yy?"*

5. Scheduling: *"We don't have time to come two hours per week!"*

This objection may result when you have not adequately translated the value of the Scholars Solution. Two hours per week is only a minor commitment in exchange for the immense value that we offer! Address this objection by reinforcing the importance of learning, the flexibility of our make-up classes policy, and by drawing comparisons with their other extra-curriculars (e.g., like sports and music, practice is essential for building confidence and competency in reading/writing, etc.!)

Sample Responses:

- *“I’m hearing that your child goes to hockey practice three times a week. That’s a big commitment! But just like in hockey, practice is essential for building confidence, competency, and passion for reading. Could you squeeze in an hour right after school twice a week?”*
- *“We are well-versed in handling busy families! That’s why we offer flexible scheduling options and a make-up policy to fit around your schedule. Which days are most convenient for you?”*
- *“We absolutely understand how busy schedules can be. That’s why our program is designed to make the biggest impact in the least amount of time possible: two hours per week ensures retention while building healthy learning habits and routines.”*
- *Summer: “Though it may seem like a big commitment, two hours per week is just 1% of your total summer!”*

6. Ratios and In-Home Tutoring: *“We want a 1:1 tutor.” or “We want a tutor who will come to our house.”*

Some parents may believe that a 1:1 tutoring solution offers more personalized attention and customization, leading to faster progress. This couldn’t be further from the truth! In fact, we find that students show the same – if not more – progress in a 2:1 or 3:1 ratio in our programs.

Teachers at our ratio can maintain personalized attention while discouraging “over-reliance” on tutors that sometimes comes with 1:1 ratios. Moreover, our in-location ratios offer a microcosm of a school classroom (i.e., a classroom on a smaller/more manageable scale) so that students can transfer their learning to school with ease.

Sample Responses:

- *“Our locations are designed to mimic a classroom on a smaller scale, which makes it easier for our students to transfer their understanding to their school classroom with confidence!”*
    - *“Studies show that test scores improve dramatically when the study environment is similar to the testing environment. Studying in a location that is organized like a classroom will be much better for retention than studying at your kitchen table!”*
- *”Our students thrive in this 3:1 ratio and show the same – if not better – results than 1:1 tutoring. In a 3:1 setting, students receive personalized attention, but they also have the opportunity to develop their own skills, strategies, and habit toolbox, without immediately relying on their tutor for help. Plus, they get to develop essential social skills too!”*

7. Homework: *"Do you give homework? We want to keep working on these concepts at home."*

Parents sometimes believe that homework is necessary to reinforce learned concepts, prepare for school expectations, build study habits, and to ensure they are informed about their child's learning.

At Scholars, ***we do not send students home with homework***, as every student's programming and success is based on activities that are fully supported by a Scholars teacher, which takes the burden off of parents, especially if students are already inundated with school homework, and ensures that we are able to consistently evaluate a student's progress and mastery - e.g., the parent is not the one completing the homework assignments *for* the child.

This doesn't mean that we want to discourage parental involvement and engagement. Consider:

- Book recommendations for families to read together at home
- For students working on letter identification, have the parent/guardian pick a letter and ask the child to find as many signs with that letter on their trip to Scholars.
- Recommend quick practice (no more than five minutes) on an app for mental math or fast fact recall

Sample Responses:

- *"Our philosophy is to take the burden off of the parent, so most of our students do not take additional work home! The program is designed to be successful without it. Having said that, I'm happy to share some great books for you and your child to read together at home."*

8. School Supports: *"I don't think we need two hours per week. My child has an EA and their IEP was just updated."*

"Accessibility" is not the same as "education." School supports like Educational Assistants and Individual Education Plans help make education more approachable for the child, but they are not a substitute for personalized lessons, especially lessons that fill in knowledge gaps from previous grade levels. Parents may believe that these solutions will address their pain points without the Scholars Solution, but they are usually incorrect in this assumption.

Sample Responses:

- *"I'm so happy that your child has an EA! However, an EA is an accessibility aid intended to make classroom material more accessible; it's not going to provide personalized* *lessons or fill the knowledge gaps from previous grade levels. That's where we come in!"*

9. Child's Personality: *"My child hates school. It's going to be impossible to get them to show up for tutoring two hours per week."*

A parent's perception of their child's personality and attitudes can significantly influence their willingness to invest in tutoring. If a child has a strong dislike for school, parents may anticipate that tutoring will be another emotional battle, leading them to resist the idea. Parents might also worry that adding tutoring to an already negative school experience will overwhelm their child, leading to frustration, disengagement, and burnout.

One way to address this is by highlighting how Scholars feels different from school. Emphasizing interactive, low-pressure learning, engaging elements, and short session times can help ease their concerns.

Sample Responses:

- *"I can certainly understand that. A benefit of Scholars is that you're not just investing in education: you're investing in a team of teachers who are dedicated to building your child's openness to learning. You won't be fighting these battles alone anymore! We've got your back."*
- *"Students who struggle in school often thrive at Scholars due to the small ratios, our Enrich, Enhance, Extend approach, and our personalized programs, which ensure that each child's lessons are exactly aligned with their existing knowledge. They won't feel overwhelmed by challenging concepts like they might be at school!"*

10. Competitors: *"I'm going to call around to other tutoring companies before I make any commitments."*

Tutoring is an investment. We do not discourage potential clients from exploring their options prior to enrolling. In fact, we encourage it! If a parent appears to be in "information-collection mode," empower them to continue their research with guiding questions that will get them to recognize the Scholars Solution on their own.

Choose the questions that are most appropriate for the student given the context of the call. After providing these guiding questions, let them know that you will call them back the next day to follow-up on their research process. These questions are designed to show parents what makes Scholars different and, more importantly, *better* than the competition.

Sample Responses:

- *"Great idea! We absolutely encourage you to do your research prior to enrolling. Based on what I've heard about your child, I have some questions you should be asking when you call around:*
    - *What are their student-to-teacher ratios?*
        - *Ours are a maximum of 3:1; some tutoring companies have one teacher walking around and supervising all the students in the classroom as they do independent work.*
    - *Do they start with an assessment to personalize their lessons? Do they offer reassessments after 36 hours in the program?*
        - *Some tutoring companies have a one-size-fits all approach. We tailor all our lessons to the child and reassess the student after 36 hours to see their growth and make any necessary adjustments to their program.*
    - *Do they progress updates to you every 12 hours, if at all?*
        - *We conference with you every 12 hours to keep you informed about your child's progress and update their learning goals.*
    - *Do they offer a Team Approach to learning?*
        - *With your support, we will contact your child's teacher to determine how to best support them.*
    - *What are their teachers' education levels?*
        - *All of our teachers have a university-level education or above, and they're all trained Scholars teachers and mentors.*
    - *Do they use "off-paper" tools and resources to engage different learning styles? Or do they just use worksheets?*

  I will include these questions in my follow-up email!"

Frequently Asked Questions

In addition to objections, there are a number of frequently asked questions that you should be prepared to answer during an inquiry. Oftentimes parents are asking these questions because they believe they are the "right" questions to ask. Being prepared and having confident explanations, even when you have to say no, will establish you as an authority in supplemental education.

1. "Can my child attend for just one hour a week?"

In order for the program to be effective and for our students to see progress, all students attend Scholars twice a week minimum (i.e. a full-time enrollment). Students with this schedule see an ***average increase of one full grade level after 40 hours of sessions*** in the focused subject area. All students should begin their Scholars journey with this frequency as it maximizes retention, gives the best return on investment, and builds strong learning habits and routines. For high school students, their courses often cover more than one chapter in a week. That being the case, they need to attend at least twice per week in order to keep up with the pace of the classroom and ensure no gaps are being created.

Clients who are looking to “get ahead” (i.e., enrichment) may have more difficulty understanding the value of a full-time enrollment. However, moving from 90% to 95% is much more challenging than moving from 60% to 70%! Even though the child may be doing well academically, if the goal is to get them from 90% to 95%, that will not happen by coming once per week. Emphasize that learning is like sports or music, practice makes perfect! (You do not stop going to soccer practice just because you’re the best on the team, especially if you are wanting to be drafted!)

Any student who attends less than two one-hour sessions per week per subject is considered to be on a “maintenance” enrollment. Ensure that you manage expectations for parents seeking this solution; though these students will certainly still see some growth, the trajectory and return on investment will be considerably slower.

2. “How long will this take?”

We recognize that every child progresses differently, but on average we see that it takes 40 hours ***to move up one grade level in a given subject***. Within your location, your entire team should be constantly evaluating how students are doing to ensure that the concepts are not too easy or too difficult. In addition, with the conference that occurs after every 12 hours of instruction, you are able to keep parents informed of their child’s progress. Additionally, after every 36 hours of instruction, you will reassess students in elementary reading, writing, and math programs to determine and demonstrate the progress made since their initial assessment.

3. “Do I have to sign a contract?”

There is no long-term contract when enrolling at Scholars since tuition is paid month-by-month; however, you do want to ensure that you have set appropriate commitment expectations with the parents from the beginning. The withdrawal policy is outlined in the Enrollment Form (IQ’s Internal Server Documents > Operations - Enrollment Documents)..

4. “Are all of your teachers “certified” teachers?”

Throughout our system, you will find the phrase “certified teachers and qualified mentors” when referencing our teachers. Though all of our teachers have at least some post-secondary education, you will find that the majority of our locations have a variety of backgrounds, skill sets, and certifications. The most important qualities that we are looking for in teachers is not a certificate, but rather someone who is qualified and passionate about helping students succeed. Teachers also receive Scholars Teacher Training on our teaching philosophy and programs to ensure they are qualified to teach and support students at the highest level at our locations.

5. “Can students get help with their homework during their class?”

Since our high school program focuses on specific subject support, it is pivotal that high school students bring in their binders, textbooks, assignments, along with completed quizzes and tests so we can offer them the optimal level of support.

For elementary students, our focus is always on filling in skill gaps and building a foundation for students for long-term success. If a student is behind, they will obviously have difficulty with the material at their current grade level, so the best thing to do is focus on getting them up to grade level.

While we want to help alleviate any stress, frustration, and anxiety a student is experiencing with a concept, if we only work on homework, then the root problem is never truly resolved and will only worsen. That is why we spend a maximum of ten minutes at the end of each class (if required) on relevant and necessary school homework that a student needs support with.

Any time given for school homework at Scholars should not be spent working on something the student isn’t having difficulty with and just needs to finish. All in all, the majority of the time spent at the location is on building the foundations for long-term success rather than providing a short-term, “band-aid” solution.

6. “Is it one-on-one tutoring? Why do you teach at a 3:1 or 2:1 ratio?”

As you already know, at Scholars we work in small student-to-teacher ratios. During their time at Scholars, every student works on their own individualized program that is built to suit their unique strengths and areas for improvement.

Not only are we working on academic skills at Scholars, we are also working to build student’s confidence, independence, skills, strategies, and habits, which are critical to their success outside of Scholars. Ultimately, a maximum of a 3:1 ratio allows for the development of essential skills (e.g., self-regulation, cooperation, etc.) and independent problem solving (without the overreliance on the teacher that comes with a 1:1 ratio).

7. “Will my child sit with students their own age?”

When matching up students to teaching tables, the first thing that should be considered is “what will be the best for this child?” Since students are all working on their own individual programs, they do not need to sit with other students their own age or even at their own ability level, so use the information you gathered from the inquiry conversations, follow-ups, and assessment to match students together appropriately with teachers who you think will best be able to support them.

As a result, you may have students who are sitting with peers their own age, or you may have them grouped by their ability level. Conversely, you may have some teaching tables grouped by a teacher’s specialty - i.e. French or Physics - or in any other combination possible as well.

TIP: It’s not necessary - and is actually discouraged - to have a student fully committed to a single teacher’s schedule. In your teaching team, you will have a wonderfully diverse group of teachers who are all competent, confident, passionate, and trained to support a variety of students - give your students the opportunity to experience them all!

While you may assume that “attaching” a student to a teacher for every session will aid in retention, it can have the exact opposite effect if the teacher they have worked with is sick, goes on vacation, or moves on to another opportunity themselves. The student will often follow out the door behind them.

8. “My child needs help with all subjects. Can they work on reading, writing, math, French, and their homework at Scholars?”

At times, parents may present a long list of problems they are looking for solutions with. This is where determining the root cause and setting expectations is paramount! As we know, reading is the foundation for all other subjects. If a student is having difficulty in math, it may be because they cannot read and/or comprehend the instructions and/or word problems. As such, the majority of our students will enroll in a reading program first and foremost.

Since every subject requires a minimum of two hours a week, if a parent is willing to commit to four hours a week, then a child could certainly work on two subjects. However, we would *not* *recommend more than four hours a week during the school year* as the child may experience burnout. In this case, you would complete the two subject assessments on different days to ensure you are getting the most accurate results.

Ultimately, in order to see progress, students' programs need to be focused and intentional. Do not look at this long list of problems that a parent presents as a challenge, but rather as an opportunity! When you demonstrate a student's growth and progress, they will be ready to continue working through their child's areas of need following the logical and systematic plan that you put in place from the very beginning.

Assessments

A critical premise in the Scholars philosophy is the belief that certain fundamentals need to be understood and mastered before true comprehension occurs. Assessments help determine the student's academic strengths and weaknesses, and allows Scholars to develop an individualized program to address any skill gaps, which helps them achieve academic success. Only certified assessors or assessors in training may administer the assessment since adhering to all assessment procedures is essential to maintaining the integrity and quality of the assessment. ***In order to be eligible to be an assessor in training, individuals must first complete the Operations portion of the Designated Operator Training***.

Assessors in Training

Before becoming certified, assessors in training may also complete assessments; however, the following steps must be completed:

1. **Before the Assessment:**

   Send a Help Desk Ticket informing Head Office of the upcoming assessment ***a minimum of 24 hours in advance*** of the scheduled assessment. For assessments scheduled on the weekend, the Help Desk Ticket must be received by noon ET on Friday.

   Whenever getting ready to submit a Help Desk Ticket, always also prepare a student-specific Google Drive folder to be shared with "Editor" access to the Assessments Team - Assessments@ScholarsED.com.

   The following is required depending on the assessment type being prepared:

Reading Readiness or 1-3 Writing	CAT-3, Levels 11-19/20
☐ Help Desk Ticket outlines the student's lead number, the student's name, key information from the inquiry that led you to choose this assessment, the assessment date and time, and an indication of the amount of time you have allocated for the assessment(s), including the student-specific Google Drive folder	☐ Help Desk Ticket outlines the student's lead number, the student's name, key information from the inquiry that led you to choose the assessment(s), and the assessment date and time, including the student-specific Google Drive folder link ☐ Prepare the Google Doc version of the

link ☐ Prepare the appropriate Google Doc version of the Assessment Record with the student's first and last name, assessment date, and complete grade, and upload into the student's Google Drive folder ☐ HQ will correlate this information with the student's profile and Day View in IQ. An email will be returned with the "green light" to proceed or to ask additional questions before administering the assessment.	*CAT-3 Scoring Chart* with the student's full name, assessment date, assessment being completed with level and appropriate subtests and test times indicated and upload into the student's Google Drive folder ☐ Prepare the appropriate Google Doc version of the Assessment Record with the student's first and last name, assessment date, and complete grade, and upload into the student's Google Drive folder ☐ HQ will correlate this information with the student's profile and Day View in IQ. An email will be returned with the "green light" to proceed or to ask additional questions before administering the assessment

2. After the Assessment:

Complete the following steps ***a minimum of 24 hours prior*** to the Assessment Review Meeting. For Assessment Review Meetings scheduled on the weekend, the comment tagging the Assessment Team in the Assessment Record and all completed documents must be received by noon ET on Friday.

- When submitting assessment documents for review, well-labelled scans or photo upload of each document are acceptable.

Assessors in training cannot share the assessment results with parents/guardians without the approval of Head Office to ensure the validity and accuracy of results being shared.

The following is required depending on the assessment type completed:

Phonics & Reading Readiness	☐ Share the *Assessment Observation Record* ☐ Share the *Phonics Assessment: Assessor Instructions, Scoring Record & Answer Key* ☐ Share the *Reading Readiness Assessment* ☐ Share the *Reading Readiness Assessment: Assessor Instructions, Scoring Record & Answer Key*

	☐ After you have completed entering marks, comments, and next steps into the Assessment Record previously shared, tag Assessments@ScholarsED.com in a comment to flag them that it is ready for review. Please include the Assessment Review Meeting date and time as well ☐ HQ will provide edits and feedback for your review prior to proceeding with the Assessment Review Meeting
Phonics & CAT-3, Level 11-13 Reading	☐ Share the *Assessment Observation Record* ☐ Share the Phonics Assessment: Assessor Instructions, Scoring Record & Answer Key ☐ Share the CAT-3 student booklet worksheet pages completed ☐ Complete all sections of the *CAT-3 Scoring Chart* ☐ After you have completed entering marks, comments, and next steps into the Assessment Record previously shared, tag Assessments@ScholarsED.com in a comment to flag them that it is ready for review. Please include the Assessment Review Meeting date and time as well ☐ HQ will provide edits and feedback for your review prior to proceeding with the Assessment Review Meeting
1-3 Writing	☐ Share the *Assessment Observation Record* ☐ Share the *1-3 Writing Assessment* ☐ Share the *1-3 Writing Assessment: Assessor Instructions, Scoring Record & Answer Key* ☐ After you have completed entering marks, comments, and next steps into the Assessment Record previously shared, tag Assessments@ScholarsED.com in a comment to flag them that it is ready for review. Please include the Assessment Review Meeting date and time as well ☐ HQ will provide edits and feedback for your review prior to proceeding with the Assessment Review Meeting

CAT-3, Level 11-13 Math	☐ Share the *Assessment Observation Record* ☐ Share the CAT-3 student booklet worksheet pages completed. ☐ Complete all sections of the *CAT-3 Scoring Chart* ☐ Share the completed Transfer of Skills (TOS) ☐ After you have completed entering marks, comments, and next steps into the Assessment Record previously shared, tag Assessments@ScholarsED.com in a comment to flag them that it is ready for review. Please include the Assessment Review Meeting date and time as well. ☐ HQ will provide edits and feedback for your review prior to proceeding with the Assessment Review Meeting.
CAT-3, Levels 14-19/20 Reading and Writing	☐ Share the Assessment Observation Record ☐ Share the CAT-3 student answer sheet (scantron) completed. ☐ Complete all sections of the Scoring Chart ☐ After you have completed entering marks, comments, and next steps into the Assessment Record previously shared, tag Assessments@ScholarsED.com in a comment to flag them that it is ready for review. Please include the Assessment Review Meeting date and time as well. ☐ HQ will provide edits and feedback for your review prior to proceeding with the Assessment Review Meeting.
CAT-3, Levels 14-19/20 Math	☐ Share the Assessment Observation Record ☐ Share the CAT-3 student answer sheet (scantron) completed. ☐ Complete all sections of the Scoring Chart ☐ Share the completed Transfer of Skills (TOS) found in IQ's Internal Server Documents > Operations - Math. ☐ After you have completed entering marks, comments, and next steps into the Assessment Record previously shared, tag Assessments@ScholarsED.com in a comment to flag them that it is ready for review. Please include the Assessment Review Meeting date and time as well. ☐ HQ will provide edits and feedback for your review prior to proceeding with the Assessment Review Meeting.

The Initial Assessment Process

The initial assessment is often our first in-person encounter with a client and it presents another great opportunity to continue to build ***competence, credibility***, and ***value*** with the family. As a result, ensure that you are completing all of the following steps whenever assessing a student:

Before the Assessment

- ▢ Ensure that you have allocated enough time to complete all required aspects of the assessment, along with buffer time for the parent/guardian to complete the *Student Information Form* (IQ's Internal Server Documents > Operations - Enrollment Documents) and any of their outstanding questions prior to the assessment.
- ▢ Review appropriate information from the *Inquiry Form* (IQ's Internal Server Documents > Operations - Enrollment Documents) and/or the student's lead profile in IQ prior to the parent and student's arrival.
- ▢ Ensure that your office presents a welcoming and organized atmosphere - i.e. no other student folders sitting on the desk or filling cabinet
- ▢ Have the *Student Information Form* (IQ's Internal Server Documents > Operations - Enrollment Documents) ready for parents to fill out while the student starts their assessment. You should also have an Enrollment Folder ready, with a copy of the *Enrollment Form* (IQ's Internal Server Documents > Operations - Enrollment Documents) ready, as many students will be ready to enroll as part of this session meeting.
- ▢ Ensure that your assessment room is clean and that all test materials are ready prior to their arrival. Provide at least two sharpened pencils and an eraser.
- ▢ Upon arrival, greet the student and parent by name and introduce yourself. Review the assessment process, including timelines. Parents are welcome to wait in the waiting room or run some errands while their child is completing the assessment; however, they cannot sit in the teaching area or the assessment room while the student is working as this will impact the validity of the student's results.
    - **TIP:** For younger students, consider assessing them in the front office while the parent can see them through the windows in the lobby/office to help ease any separation anxiety.
- ▢ Spend time developing a rapport with the student and parent, taking the student on a tour, and highlighting some aspects of the location they may enjoy - the Manipulative Shelf, the Scholars Store, etc.
- ▢ Have the parent fully complete both pages of the *Student Information Form* (IQ's Internal Server Documents > Operations - Enrollment Documents)on-site. This form should not be taken home and returned at a later time.

   - **TIP:** While they are filling out this form before you start the assessment with the student is a great time to ask and answer any further questions.
- After, walk the student to the assessment room (or remain in the front office) and have them begin the assessment as per the assessor instructions for that assessment.

During the Assessment

- Use positive reinforcement throughout the assessment to help build confidence and create a positive environment, but don't go overboard!
   - Focus on clear and specific praise that is not solely focused on academics - e.g., *"You are doing so well at rereading the questions again."*
   - Verbal praise ***is not*** required after every answer - e.g., *"That's right! Good job! You got it!"*
- Control your tone facial expressions – do not give any clues about whether a student answered correctly vs. incorrectly.
- Do not provide any extra comments or instructions other than those dictated in the assessor's instructions. Extra information will result in an inaccurate assessment result.
- Use the *Scholars Assessment Observation Record* (IQ's Internal Server Documents > Operations - Assessment Documents) to take thorough notes throughout the assessment so you can share your initial anecdotal observations with the parent post-assessment and to support the writing of detailed comments in the Assessment Record to provide valuable and ample feedback to the parents.
   - Note any waning of attention – take a break if necessary.
   - Note the student's body language - confidence, self-esteem, anxiety, fidgeting, focus, fatigue, etc.
   - Note if they utilize finger tracking when reading, their pencil grip, and/or how they hold a book.
   - Note how the student forms letters and numbers - i.e. - they should be starting at the top and working downward.
   - Note if the student asks you to repeat questions. This may be a result of the student having hearing challenge or auditory processing weakness
   - Note if the student is very close to the page in order to read. This may be an indicator of some vision difficulties.
   - Note any strategies used during the assessment (drawing pictures to help with math or comprehension, using a number line, spelling tricks, self-correcting, etc.)
   - Does the student persevere? Take risks? Demonstrate strong organization, attention to detail, or time management strategies?
- For students assessed using the Phonics Assessment, Reading Reading Assessment, 1-3 Writing Assessment, or a CAT-3 Levels 11-13,, the assessor will sit with the student for the entirety of the assessment.

- For students who complete CAT-3 Level 14+ assessments, the assessor completes the sample questions for each section with the student and then the student *can* proceed with answering independently. However, it's crucial for the assessor to continue to monitor their progress to make sure they aren't overwhelmed, able to complete the required questions, and have observations to fill their *Scholars Assessment Observation Record* (IQ's Internal Server Documents > Operations - Assessment Documents).

After the Assessment

- Ideally, you should meet briefly with the parent/guardian immediately after the assessment to provide an overview of the student's learning skills and observed performance in an effort to enroll the student immediately - *capitalize on the urgency and the fact that they are already present with you.*
    - If the parent/guardian would like to see the assessment results prior to enrolling, book an Assessment Review Meeting as soon as possible to convert to an enrollment.
- Even if the student enrolls after the initial assessment, book an Assessment Review Meeting as soon as possible - or even at the beginning of their first session - to build rapport with the parent/guardian and convey the credibility of the Scholars Solution.
- If you are working towards your assessor certification, remember that you must submit all assessment documents to Head Office for review before presenting the formal Assessment Record and corresponding data to the parents.
- Ask the parents if they have any further questions.
- Give the child a small Scholars' token, such as a small promotional item (pencil, pen, stress ball, etc.) or a Scholars Apple with xx points on it. If the student brings the Scholars Apple back for their first session, they get to kick-start their point accumulation for the Scholars Store.

Scholars Assessments

Phonics Assessment

The Phonics Assessment is designed for students who are ***not yet reading at the grade four level***. This assessment focuses on the following areas: letter names and sounds, short vowels, consonant blends, long vowels, consonant digraphs, vowel digraphs, r-controlled vowels, and five levels of sight words. The assessment allows us to build an individualized reading program for students, whether that be Reading Readiness or GAP-Reading.

Note: The *Phonics Assessment* is never done in isolation. It is also a starting assessment for a *Reading Readiness Assessment* or a *CAT-3 Reading* assessment.

Administration:

- The student is not yet reading at the grade four level.
- If the student becomes visibly frustrated or is unable to answer the first few questions while completing one of the subtests, discontinue the subtest and continue to the next one. Begin the next subtest and if the student continues to be frustrated, stop assessing.

Materials:

- *Phonics Assessment*
- *Phonics Assessment: Assessor Instructions, Scoring Record & Answer Key*
- *Assessment Observation Record*

  Note: All of the above materials are found in IQ's Internal Server Documents > Assessment Documents

Marking and Reporting:

- Review the objectives for each subtest and present the instructions orally for each subtest.
- As you work through the assessment with the student, use the scoring charts for each subtest to mark and determine if the student has achieved mastery or not. ***Pay attention to the early stopping points marked throughout the assessment.***
- When you have finished assessing, transfer the student's subtest scores to the *Reading Readiness Assessment Record* or the *CAT-3 Reading Assessment Record* depending on the student's reading level. (Both of these Assessment Record templates are found in Scholars Google Drive Documents folder > Assessment Records)
  - In the Phonics Assessment Results section, include the total correct in the score column for each subtest administered. Type N/A in the score column if the student wasn't able to attempt that section - either due to an early stopping point or missing the required knowledge foundation.
  - Include appropriate comments and next steps in the appropriate Assessment Record - see Sample Comments and Next Steps.

Reading Readiness Assessment

The Reading Readiness Assessment is designed for students who are ***reading below the grade one level***. This assessment screen assesses a student's strengths and areas for improvement in the areas of comprehension, vocabulary, introductory mathematics, fine motor skills, and more.

Administration:

- The student is reading below the grade 1 level.
- The student has already completed the *Phonics Assessment*.

- If the student becomes visibly frustrated or is unable to answer the first few questions while completing one of the subtests, discontinue the subtest and continue to the next one.
  - Unlike the *Phonics Assessment*, where there are early stopping points, in this assessment screening, students will attempt all subtests.

Materials:

- *Reading Readiness Assessment*
- *Reading Readiness Assessment: Assessor Instructions, Scoring Record & Answer Key*
- *Assessment Observation Record* (the same one that was started with the Phonics Assessment)
  Note: All of the above materials are found in IQ's Internal Server Documents > Assessment Documents
- Two sharpened pencils, eraser, pencil crayons, and ruler

Marking and Reporting:

- Review the objectives for each subtest and present the instructions orally for each subtest.
- As you work through the assessment with the student, use the scoring charts for each subtest to mark and determine the total number correct for each.
- When you have finished assessing, transfer the student's subtest scores to the R*eading Readiness Assessment Record* (Scholars Google Drive Documents folder > Assessment Records).
  - In the Reading Readiness Assessment Results section, include the total correct in the Score column for each subtest administered. Type N/A in the score column if the student wasn't able to attempt that section -due to missing the required knowledge foundation.
  - Include appropriate comments and next steps in the Assessment Record - see Sample Comments and Next Steps.

1-3 Writing Assessment

The 1-3 Writing Assessment is designed for students in **grades 1-3 who are reading at grade level**. This assessment measures writing foundations and extensions.

Administration:

- The student is in grades 1-3 and reading at grade level.
- If the student becomes visibly frustrated or is unable to answer the first few questions while completing one of the subtests, discontinue the subtest and continue to the next one. Students will attempt all subtests in this assessment.

Materials:

- *1-3 Writing Assessment*
- *1-3 Writing Assessment: Assessor Instructions, Scoring Record & Answer Key*

- *Assessment Observation Record*
  Note: All of the above materials are found in IQ's Internal Server Documents > Assessment Documents
- Two sharpened pencils and an eraser

Marking and Reporting:

- Review the objectives and present the instructions orally for each subtest.
- As you work through the assessment with the student, use the scoring charts for each subtest to mark and determine the total number correct for each.
- When you have finished assessing, transfer the student's subtest scores to the 1-3 Writing Assessment Record.
  - In the Reading Readiness Assessment Results section, include the total correct in the Score column for each subtest administered. Type N/A in the score column if the student wasn't able to attempt that section -due to missing the required knowledge foundation.
  - Include appropriate comments and next steps in the Reading Readiness Assessment Record - see Sample Comments and Next Steps.

Canadian Achievement Test 3 (CAT-3)

The CAT-3 is a nationally standardized assessment used by Scholars to place students at the appropriate starting level and to develop individualized programs. The CAT-3 is administered to determine a student's functional level in reading and language comprehension, reading and language conventions, vocabulary, writing conventions, mathematics, and computations.

CAT-3 Level Assignments, Test Subject, and Test Times

The *CAT-3 Level Assignments, Test Subjects, and Test Times* (IQ's Internal Server Documents > Operations - Assessment Documents) is an invaluable resource to use in your preparation for any CAT-3 assessment. There are two charts within this document:

Level Assignment Chart

The assessment that you choose for each student is very important in order to generate results that will accurately depict the student's areas of strength and weakness. As a result, it is imperative that you reference the Level Assignment Chart within the *CAT-3 Level Assignments, Test Subjects, and Test Times* to ensure each student is being assessed at the appropriate level.

Exceptions:

1. Parents who have expressed that their child is ***significantly above grade level*** should be assessed at ***one level higher*** than the chart indicates.

2. Parents who have expressed that their child is ***significantly below grade leve***l or according to their IEP should be assessed ***one level lower*** than the chart indicates.

Test Subjects and Times for Required Subtests

This chart provides information on the required subtests for each subject along with the time limits that must be enforced for each subtest.

CAT-3 Reading, Writing, or Math Assessment

Administration:

- Follow the appropriate level Test Directions for Teachers and ensure that the time limits are being enforced.
- For Levels 11-13, the assessor sits with the student for the entirety of the assessment.
  - If the student is struggling to the point where he/she is having difficulty reading the words at that level and/or not getting any answers correct, then drop down a level. Do not drop down further than one level below the student's actual grade.
- For Levels 14-20, the assessor completes the sample questions for each section with the student and then the student *can* proceed with answering independently. However, it's crucial for the assessor to continue to monitor their progress to make sure they aren't overwhelmed, able to complete the required questions, and have observations to fill their *Scholars Assessment Observation Record* (IQ's Internal Server Documents > Operations - Assessment Documents) ***Ensure they are comfortable filling in the scantron answer form.***
  - If the student is struggling to the point where he/she is having difficulty reading the words at that level and/or not getting any answers correct, then drop down a level. Do not drop down further than one level below the student's actual grade.

Materials:

- ▢ Two sharpened pencils and an eraser
- ▢ CAT-3 Student Book for Levels 11-13 and/or Scantron Answer Forms for Levels 14+
- ▢ CAT-3 Test Directions at the corresponding level of the student's assessment
- ▢ *Assessment Observation Record*
- ▢ *CAT-3 Scoring Chart*
- ▢ CAT-3 Answer Key
- ▢ Norms Book

Marking and Reporting:

- ▢ Prepare your *CAT-3 Scoring Chart* (Scholars Google Drive Documents > CAT-3 Assessment Documents). This is where you will record all of your calculations.

- Use the CAT-3 Answer Key to tally the number of questions correct in each subtest administered. ***Pay attention to the difference between non-starred and starred questions in Reading and Language Part 1 & Part 2.***
- Use the Norms Book to determine the scale scores, percentiles, and grade equivalents for each subtest administered.
    - Scale Scores - based on the CAT-3 Level administered
    - Percentiles - based on the student's current grade and the time of year they were assessed
    - Grade Equivalents - based on the CAT-3 assessment level administered
        - **Note**: Use the following columns in the scale score, percentile, and grade equivalent charts for each subject's assessment:
            - **Reading: Reading & Vocabulary**
            - **Writing: Language & Language/Writing Conventions**
            - **Math: Mathematics & Computation/Computation & Numerical Estimation**
- For students who have completed the CAT-3 math assessment, you will also need to complete the Transfer of Skills.
- When you have finished your calculations, transfer the student's percentile and grade equivalency for each subtest administered into the appropriate CAT-3 Assessment Record, along with appropriate comments and next steps - see Sample Comments and Next Steps
    - *CAT-3 Reading Assessment Record* (plus Phonics Assessment section if the student is below the grade 4 level)
    - *CAT-3 Writing Assessment Record*
    - *CAT-3 Math Assessment Record*
        - **Note**: if a student scores above their current grade, simply indicate "above" in the grade equivalent section. See pages 1-2 of the Norms Book for further information about interpreting CAT-3 scores. Otherwise, the grade equivalent from the Norms Book is includes

	Percentile[1]	**Grade Equivalent[2]**
Mathematics	**89th**	**Above**
Computation	**56th**	**6.3**

- Include the initial assessment grade equivalencies for each subtest assessed in the student's profile on IQ.

Math Transfer of Skills:

The *Transfer of Skills (TOS)* sheet is a tool to help you relay pertinent information from the math assessment to the parent, as well as a foundation for building the individualized math program for the student. Every question at every level of the CAT-3 Mathematics and Computation subtests have been matched with the appropriate sub-concept(s) in our math program. Therefore, if a question has been answered incorrectly on the assessment, that skill needs to be incorporated into a student's program.

Complete the following steps to determine the skill gaps:

- Select the correct Transfer of Skills level.
- In tab 1, highlight the codes to any questions that are incorrect on the answer sheet.
- In tab 2, highlight the codes in tab 2 that were highlighted in tab 1 in their ordered list. This provides you an organized summary of skill gaps based on the five strands of math by grade level, which you will summarize in the *CAT-3 Math Assessment Record* and also use when creating the student's program.
- In the CAT-3 Math Assessment Record - Identified Skill Gaps section, include the grade level and the total number of skill gaps identified in each strand at that level as shown in the example below:

Identified Skill Gaps*:

	Number Sense & Numeration	Measurement	Geometry & Spatial Sense	Patterning & Algebra	Data Management & Probability
Grade 4	5	1	2	4	3
Grade 5	8	1	5	4	4
Grade 6	12	5	6	7	4

*Number of identified skill gaps in each stream at each grade level.

Sample Comments & Next Steps

Comments

The comments section of any Assessment Record should give a succinct summary of the ***observations*** you made during the assessment. The comment section will generally not include any specifics about ***what*** the student had difficulty with as this is shown in the result chart(s) themselves; rather, the comment section should focus on demonstrating ***how*** their child thinks and works.

This is the perfect opportunity to further establish your competence and credibility by tying in the parent's concerns and observations shared during the initial inquiry conversations to the comments from the assessment. This paragraph is generally 3-5 sentences long.

Sample Comments:

- *Although ______ had difficulty with some of the phonics subtests, ______ persevered and always tried their best.*
- *______ rushed through their assessment and did not use all of the available time. It will be important for ______ to focus on the quality of their work rather than the number of questions they are able to complete quickly moving forward.*
- ______ was very eager and engaged throughout the assessment! It is clear that _____ enjoys a challenge and embraces it completely.
- *______ does not currently hold their pencil correctly, which is likely the reason they are experiencing fatigue when writing and a lack of fine motor control when colouring.*
- *While ______ finished all of their assessment questions before the allocated time was up, they used the extra time to review their answers. We applaud this wonderful habit!*
- *Despite scoring well in the mathematics subtest, ______ displayed a weakness in their computation skills. This means ____________ has been relying on a calculator to do their computations. This is concerning because it will affect all areas of math, but particularly their speed when completing timed tests at school.*

Next Steps

The next steps section of the Assessment Record will ***outline the plan, establish goals, and set expectations*** for the student's program. Avoid "powerless" words like "recommend and *suggest" in this* section as this does not help you to assert yourself as the expert parents are looking for. In the end, this section should not only focus on the student's academic goals, but also demonstrate how Scholars programs will support their skills, strategies, and habits for life-long skills - a key retention tool as well. This paragraph is generally 3-5 sentences long.

Sample Next Steps:

- *______ will attend Scholars a minimum of two one-hour sessions per week on a personalized reading program.*
- *______ program will focus on logically and sequentially filling in the skill gaps demonstrated in the assessment so they can catch up to their peers. We can further accelerate their progress by adding an additional hour.*
- *______ program will build on their phonics strategy of diligently breaking apart words into smaller components to increase their reading comprehension and vocabulary.*
- *During ______'s time at Scholars, we will work with ______ to become more confident/develop better study habits/improve their mental math skills.*

TIP: Place a copy of the Quick Reference Guide: Assessment Flowcharts found as an appendix to this Playbook on the clipboard that holds your Inquiry Forms in your office.

French Benchmarking Session

All students heading into French programs receive a complimentary benchmarking session. During this session, students will work on a variety of level-appropriate activities with a subject-specialist teacher to determine the student's introductory level of their programming, along with their strengths and areas for improvement in reading, writing, listening, and speaking in French.

Administration:

- [ ] Before your first French benchmarking session, you will create a "French Benchmarking" student profile in IQ with a $0 J'aime le francais and $0 Prêt à lire program under this student.
  - ***Note:*** you will continue to reuse this profile for all French Benchmarking sessions.
- [ ] When a student books their benchmarking session, complete the following steps:

- ☐ Schedule the benchmarking session in IQ under the teacher who will be completing this session - IQ > Scheduler > Day View > Add Assessment > Input all necessary fields and select Type: Trial Hour and Subtype: French.
- ☐ Edit the French Benchmarking student profile in IQ (Enrollment Actions > View Enrollment) and first update the session.
    - **TIP:** This session will just be for the day of the upcoming benchmarking session and the default teacher will be you as the Director since we do not want the teacher to be adding any marks or comments to this profile for these sessions. This is to print the material for the trial session, and then you will mark the session as attended in IQ via Binder > Assignments Pending Approval (without any marks or comments since this material will likely need to be reused in future benchmarking sessions for students starting at the same point).

- ☐ You will then update the Active Course (View > Edit) to align with the correct starting points based on the Prêt à lire and J'aime le français Benchmarking Chart (found below), which is guided by your initial inquiry conversation(s).
- ☐ Once you have all of this information updated, you will head to Binder > Binder Pulling Report and print off the new pages for the day in question.
- ☐ You will provide these pages to the teacher, who will complete at least one page of each strand (i.e. phonics, vocabulary, etc.) after fully completing and editing the appropriate French *All About Me* (IQ's Internal Server Documents > Operations - Binder Documents).
- ☐ Your teacher will be able to provide you with feedback after the session on the appropriateness of the selected benchmarking level for you to use when creating their official program and course.

Materials:

- ☐ Appropriate level of the French *All About Me* (IQ's Internal Server Documents > Operations - Binder Documents)
- ☐ Eight activities from the French Benchmarking student's binder pulling for that day

Marking and Reporting:

- ☐ Based on the information shared with you by the teacher regarding the student's strengths and areas for improvement in reading, writing, listening, and speaking in French, you will meet with the parent/guardian about this information and discuss the next steps.

- [ ] **TIP:** The best practice is to have this conversation immediately after the benchmarking session (make sure to budget time for yourself and set this expectation with the parent/guardian upon booking) with the goal of enrolling on the spot.

Prêt à lire and J’aime le français Benchmarking Chart

Program Levels	Core French	French Immersion
Prêt à lire 1	Beginner French	Beginner French
Prêt à lire 2	< Grade 4	< Grade 1 (JK)
Prêt à lire 3	< Grade 4	< Grade 1 (SK)
J'aime le français 1	Grade 4/5	Grade 1
J'aime le français 2	Grade 6	Grade 2
J'aime le français 3	Grade 7	Grade 3
J'aime le français 4	Grade 8	Grade 4
J'aime le français 5	Grade 9	Grade 5
J'aime le français 6	Grade 10	Grade 6
J'aime le français 7	Grade 11	Grade 7
J'aime le français 8	Grade 12	Grade 8

High School Trial Hour

For high school, students complete a complimentary trial hour. During this time, you and one of your subject-specialist teachers will determine more information about the student’s strengths and weaknesses - not just from a purely subject matter standpoint, but also considering their skills, strategies, and habits. This session is an evaluation and opportunity to learn more about a student; it is not a homework completion session or a “free” class to get ready for a test coming up on Friday.

Administration:

- [ ] When a student books their trial hour, schedule this session in IQ under the teacher who will be completing this session - IQ > Scheduler > Day View > Add Assessment > Input all necessary fields and select Type: Trial Hour and Subtype: subject of focus.
    - [ ] Edit the French Benchmarking student profile in IQ (Enrollment Actions > View Enrollment) and first update the session.
        - **TIP:** This session will just be for the day of the upcoming benchmarking session and the default teacher will be you as the Director since we do not want the teacher to be adding any marks or comments to this profile for these sessions. This is to print the material for the trial session, and then you will mark the session as attended in IQ via Binder > Assignments Pending Approval (without any marks or comments since this material will likely need to be reused in future benchmarking sessions for students starting at the same point).
- [ ] Provide a copy of the *Subject Support Outline* (IQ's Internal Server Documents > Operations - LTT Documents) to the teacher for them to work through with the student at the beginning of this session.
    - [ ] **TIP:** This two-sided document should take the majority of the session when administered well, with a few minutes to review a question or two from their homework.
        - Each section should be fully completed (i.e. three substantial and complete thoughts for "Strentgths"...)
    - [ ] **TIP:** Throughout the completion of the *Subject Support Outline*, the conversation will naturally gravitate towards organization, time management, specific concepts/assignments.
        - This is the perfect opportunity to have the student pull out their resources and have your teacher take copies of ***all*** course outlines for the semester, previous tests/assignments, upcoming assignments, etc. to be put in the student's binder upon enrollment.
- [ ] Your teacher will be able to provide you with feedback after the session along the fully completed *Subject Support Outline* and the pages they photocopied for the student's binder moving forward.

Materials:

- [ ] *Subject Support Outline* (IQ's Internal Server Documents > Operations - LTT Documents)

Marking and Reporting:

- ☐ Based on the information shared with you by the teacher alongside the completed *Subject Support Outline*, you will meet with the parent/guardian about this information and discuss the next steps.
    - ☐ **TIP:** The best practice is to have this conversation immediately after the trial hour (make sure to budget time for yourself and set this expectation with the parent/guardian upon booking) with the goal of enrolling on the spot.

Chapter 6: Assessment Review & Enrollment Meetings

Assessment Review Meeting

Every client who has completed an assessment, will always have an Assessment Review Meeting to present the student's completed Assessment Record to the parent/guardian outlining the student's academic skills demonstrated, along with observations about the child not found in the correct and incorrect answers, and the next steps for the student's personalized programming.

Whether the student enrolled on the assessment day - after you shared an overview of the student's learning skills and observed performance in an effort to enroll the student immediately (preferred) - or if the parent/guardian would like to see the assessment results prior to enrolling (alternative), the Assessment Review Meeting will be booked as soon as possible after the assessment <u>or</u> even at the beginning of their first session for those already enrolled..

Preparation:

- [ ] Following the steps found in Chapter 4: Assessments, you will have already generated the appropriate Assessment Record.
- [ ] Schedule a 30-minute Assessment Review Meeting with the family.
    - [ ] **TIP:** Send a Google Calendar invite to confirm the appointment in both your and your client's calendars.

Assessment Review Meeting:

- [ ] Begin every Assessment Review Meeting by building rapport with the parent(s)/guardian(s)
- [ ] Before presenting the Assessment Record, ask the parent what their child shared about their first experience at Scholars.
- [ ] Place the Assessment Record in front of the parent(s)/guardian(s)
    - [ ] **TIP:** Chunk the material that you are presenting to the parent by covering the bottom sections and revealing section by section to ensure they are focused on the topic of discussion.
- [ ] As you go through each section, ensure that the parent has an opportunity to ask any questions they may have.
    - [ ] While you can certainly show parent(s)/guardian(s) examples of a student's work or the questions they answered, ***<u>none</u>*** of this material can go home - photocopies, photos, etc.
- [ ] At the end of the assessment review conversation, both yourself and the parent(s)/guardian(s) will sign the bottom of the Assessment Record.

- [ ] ***For those who <u>have</u> enrolled already***, keep the original for the student's file on location and send a copy home with the parent - either a physical photocopy or an email scanned copy.
    - [ ] If sending home a physical copy, this will go into the Enrollment Folder, which asks as the family's file folder at home for all of their Scholars reports - i.e. Enrollment Form, Assessment/Progress Assessment Records and Conference Reports.
- [ ] ***For those who <u>haven't</u> enrolled yet***, proceed to the Enrollment Meeting.
    - [ ] **TIP:** As the assessment is completed as a part of a student's enrollment, a copy of the Assessment Record will go home once the student has completed an Enrollment Form (IQ's Internal Server Documents > Operations - Enrollment Documents).

Best Practices

- If the parent insists on having the Assessment Review Meeting in the Scholars Online Classroom or over the phone, have the discussion first.
    - In-person or voice-to-voice conversations will always yield the best results as you are able to clarify any questions the parent(s)/guardian(s) may have in live time, ensure that clear expectations and goals are understood, continue to build the rapport needed to develop ***competence***, ***credibility***, and ***value***, and get ahead of any concerns they may have to proactively respond.
        - **Note:** Assessment Records are ***<u>never</u>*** just emailed to families to review on their own.

Enrollment Meeting

Before enrolling the student in IQ, every family will meet with you for an Enrollment Meeting. The purpose of this meeting is to finalize the student's recurring schedule, gather pre-authorized payment information, and, most importantly, ***establish expectations with Scholars enrollment policies.***

This Enrollment Meeting will take place in one of two ways:

★ **Preferred:**
If the student is enrolled on the assessment day - after you shared an overview of the student's learning skills and observed performance in an effort to enroll the student immediately - you will complete the Enrollment Meeting following the assessment.
- **TIP:** Ensure you always give yourself enough buffer time after an assessment to allow for this review (approximately 30 minutes).

★ **Alternative:**
After the parent(s)/guardian(s) have engaged with you during the Assessment Review Meeting, you will transition into the Enrollment Meeting.

Preparation:

- ☐ Prepare a copy of the Enrollment Form (IQ's Internal Server Documents > Operations - Enrollment Documents)
- ☐ Schedule a 30-minute Assessment Review Meeting with the family.
  - ☐ **TIP:** Send a Google Calendar invite to confirm the appointment in both your and your client's calendars.

Enrollment Review Meeting:

- ☐ Place the Enrollment Form in front of the parent(s)/guardian(s)
  - ☐ **TIP:** Chunk the material that you are presenting to the parent by covering the bottom sections and revealing section by section to ensure they are focused on the topic of discussion.
- ☐ As you go through each section, ensure that the parent has an opportunity to ask any questions they may have before completing, initialing, or signing.
- ☐ Once the Enrollment Form is completed, keep the original for the student's file on location and send a copy home with the parent - either a physical photocopy or an email scanned copy.
  - ☐ If sending home a physical copy, this will go into the Enrollment Folder, which asks as the family's file folder at home for all of their Scholars reports - i.e. Enrollment Form, Assessment/Progress Assessment Records and Conference Reports.

Best Practices

- If the parent insists on having the Assessment Review Meeting in the Scholars Online Classroom or over the phone, have the discussion first.
  - In-person or voice-to-voice conversations will always yield the best results as you are able to clarify any questions the parent(s)/guardian(s) may have in live time, ensure that clear expectations and goals are understood, continue to build the rapport needed to develop ***competence***, ***credibility***, and ***value***, and get ahead of any concerns they may have to proactively respond.
- Only enroll students in IQ, once the Enrollment Form has been completed fully and you have processed their first payment.

Team Approach Agreement (Optional)

The fourth page of the Enrollment Form contains our optional - while highly recommended - Team Approach Agreement. By completing the Team Approach Agreement, it gives us the information and opportunity to *attempt* to connect with members of the student's education success team.

Unfortunately, there is no guarantee that the member of the student's education success team will respond - as they are not obliged to. In order to increase your chances of success, here are a few best practices:

★ Email

Most of the time, you will have the best success in connecting via email. When emailing a member of the student's education success team, always maintain a professional and "offering" tone - i.e., you are not just "hunting" for information, but rather are also offering valuable information and insights to the team member, along with sharing some highlights of our programming to emphasize the value of our services.

- When sending an email to a member of the student's education success team, always include a scanned copy of the Team Approach Agreement so the team member knows that you have received direct authorization from the parent for parties to connect and share, along with CCing the parent/guardian to the email as well.
  - Sample Email:

    Hello [Teacher's Name],

    We recently completed a complimentary [subject] assessment/benchmarking session/trial hour for [Student's Name] and they have enrolled in our fabulous [subject] program at Scholars of [Location]!

    At Scholars of [Location], we believe in a Team Approach to education. We work with each child's student's education success team to discuss their assessment results, learning skills, and academic performance so that we can provide personalized support at Scholars. Together, we can help [Student's Name] build their confidence and reach their goals.

During their assessment/benchmarking session/trial hour, we observed... (e.g. their reading comprehension skills are currently at grade 3.2, they are strong at decoding unfamiliar words, but they lack confidence in the words that they do know and break apart all words, which impacts their fluency, etc.)

Does this align with what you are seeing in the classroom? Is there anything else you'd like us to know? Do you have a Google Classroom or agenda that you use to track progress and upcoming assignments?
I'd also be happy to connect with you via phone if that's your preferred method of communication.

Yours in Education,
[Director's Name]

★ Respect Their Time

Hopefully, you have a great first response and connection with the student's education success team member! Just like you, student's education success team members are busy, so it's important to respect their time when thinking about future communications.

Rather than emailing them every week or every other week, consider some key times to facilitate meaningful touchpoints - i.e. Scholars conference reports, progress assessment completion, school reporting periods, etc. These are great times to reconnect to reflect on the child's victories, areas of growth, and to get updated about the class's progress at school.

The Pre-Reading Readiness & Reading Readiness Programs

Program Summary

The new Reading Readiness and Pre-Reading Readiness programs feature multiple levels, which start at our earliest of readers to logically and sequentially scaffold the foundational skills necessary to become a successful reader, and flows seamlessly into any of our other elementary reading, writing, or math programs.

Phonics:

The phonics component is the basis of our program and, as such, has been fully revamped based on the frequency of letters in the English language to allow students to learn how to decode words instead of having to know every word by sight.

The student will work on assigned exercises for each subconcept and will move onto the next subconcept once the mastery criteria has been met. The subconcepts in each strand are integrated as well so students don't work through an entire skill level from start to finish before being introduced to a new skill.

This strand includes multiple opportunities for review to further establish proficiency of the skills when put in the context of other letters as well as deepens their retention of the letters and sounds.

Phonics is a mandatory component of both the Pre-Reading Readiness and Reading Readiness programs. You will select specific concepts for this component based on the results of the Phonics Assessment and students will be assigned subconcepts sequentially.

Sight Vocabulary:

Students will have specific sight vocabulary activity pages as a mandatory component to their program. As such, the sight word list from IQ's Internal Server Documents is no longer required. Sight words are high-frequency words in reading that a student should, with practice, be able to say upon seeing (i.e. without needing to 'sound them out'). Aside from being high frequency, some of the words in these lists do not follow traditional phonics rules students are being taught at this stage, thereby requiring memorization.

Note:

- Level 1 aligns with the short vowel-consonant rhyming patterns students focus on in Level 1's concepts.
- Level 2 aligns with and contains the Pre-Primer Dolch sight words from the Phonics Assessment.
- Level 3 aligns with and contains the Primer Dolch sight words from the Phonics Assessment

Sight vocabulary is a mandatory component in the Reading Readiness program. It is not a component of the Pre-Reading Readiness program. You will select a starting point for this component based on the results of the Phonics Assessment and students will be assigned subconcepts incrementally.

Comprehension:

The comprehension activities in this program synchronize with the phonics and sight vocabulary concepts. In the initial levels, students focus on sound patterns with the most frequent consonants and short vowels and work up to an introduction of reading comprehension skills and strategies such as classification and following directions.

Comprehension is a mandatory component in the Reading Readiness program. It is not a component of the Pre-Reading Readiness program. You will select a starting point for this component based on the results of the Phonics Assessment and students will be assigned subconcepts incrementally.

Level 1 Phonics, Sight Vocabulary, and Comprehension Integration Example:

Phonics	Sight Vocabulary	Comprehension
T (IMF & Review) N (IMF & Review) S (IMF & Review) TNS Review Short E	- et Family - en Family - et & - en Family Review	- et Family - en Family - et & - en Family Review

Vocabulary:

The vocabulary component ensures that the student can read levelled words, understand what the words mean, and know how to use words appropriately. In Reading Readiness, the vocabulary sets are thematically based. Additionally, target words from initial activities become non-target words for future activities to further reinforce vocabulary development throughout the program.

Vocabulary is a mandatory component in the Reading Readiness program. It is not a component of the Pre-Reading Readiness program. You will select a starting point for this component based on the results of the Phonics Assessment and students will be assigned subconcepts incrementally.

Fine Motor:

An additional optional component has been added to our new Reading Readiness programs. These pencil and scissor activities help build students' fine motor skills and prepare them for printing. ***This is highly recommended for students who need to develop their fine motor skills before beginning to print letters.***

Fine Motor is a mandatory component of the Pre-Reading Readiness program. It is an optional addition to the Reading Readiness program. You will select specific concepts for this component based on the students needs and students will be assigned subconcepts sequentially.

Printing:

Our brand new printing program is scoped and sequenced in the same way our new phonics program is - based on frequency of letters and sounds. This means that our early readers have multiple opportunities to read, learn, and practice these letters. Additionally, we are introducing sky, grass, dirt imagery and letter stories to act as cues in supporting students with proper letter formation, alignment of letters on primary paper lines, and beginning formation of words and simple sentences.

Each activity page will last two sessions so that students practice the letter in the first class with prompts and guidance, and in the second session, they practice further to demonstrate their retention. For each concept, students will work on capital formation and placement, lowercase formation and placement, along with applying these formations to words and simple sentences.

Note: In IQ, teachers will include a mark for the page after both session activities are completed as indicated by the note on each page.

While these activities are uploaded to IQ in colour, they are also grey-scale friendly. Additionally, to further support this component, it is ***highly recommended*** to print the ***Alphabet Anchor Chart*** and/or the ***Printing Anchor Chart*** found in IQ's Internal Server Documents in colour and added to the front section of a student's binder in a page protector for longevity for quick reference.

The one-page Printing Chart coincides with the sky, grass, dirt imagery of the activity pages themselves to support students with proper letter formation, alignment of letters on primary paper lines, and beginning formation of words and simple sentences, while the two-page Alphabet Chart, features all of the uppercase letters on one page with anchor images and then similarly presented on the next page with lowercase letters.

Printing is a mandatory component of the Pre-Reading Readiness program. It is an optional addition to the Reading Readiness program. You will select specific concepts for this component based on the results of the Phonics Assessment and students will be assigned subconcepts sequentially.

Note: In the Reading Readiness program, Fine Motor and Printing are merged together so that a student who begins in Fine Motor can automatically transition to Printing skills (so long as selected).

Mathematics:

The optional mathematical component in the Reading Readiness program ranges from pre-math skills, such as identifying numbers and counting to simple addition and subtraction. ***Students who are reading below level should not be completing math components to allow them to focus purely on their reading skills.***

Mathematics is an optional component of both the Pre-Reading Readiness and Reading Readiness programs. You will select a starting point for this component based on the results of the math-related subtests from the Reading Readiness Assessment and students will be assigned subconcepts incrementally.

The Elementary Reading Program (GAP - Reading)

Program Summary

Scholars elementary reading program focuses specifically on comprehension, vocabulary, sight words (if applicable), and phonics (if applicable). The goal of this program is to fill in gaps in learning and increase achievement levels in comprehension and vocabulary, along with strengthening phonetic skills and facilitating sight word mastery for those who require these components.

Optional - Phonics:

For students ***not yet reading at the grade 4 level***, the initial Phonics Assessment will determine the student's skill gaps in phonics. The student's program will contain only those subconcepts which they have not yet mastered. The student will work on assigned exercises for each subconcept and will move onto the next subconcept once the mastery criteria has been met.

Optional - Sight Words:

Another aspect of the elementary reading program that will be added for those students ***not yet reading at the grade 4 level*** is sight words. Throughout their sessions at Scholars, these students will continue to develop their proficiency with these high frequency words.

Reading Comprehension:

The comprehension section focuses on a number of different subskills organized sequentially from foundation skills to extension skills. Once the student has met the mastery criteria in all subskills, the student is promoted to the next level and the same process is followed. Depending on the student's instructional level, the following subskills may be presented:

- Classification
- Sequencing
- Following Directions
- Facts
- Cause and Effect
- Fiction and Non-Fiction
- Fact and Opinion
- Main Idea
- Predicting Outcomes
- Drawing Conclusions
- Deductive Reasoning (Inferencing)
- Author's Purpose
- Character Analysis
- Structural Technique

Vocabulary:

The vocabulary component ensures that the student can read the grade-levelled words, understand what the words mean, and know how to use words appropriately. Depending on the student's instructional level, the following subskills may be presented:

- Antonyms
- Synonyms
- Homophones
- Homographs
- Compound Words
- Prefixes
- Suffixes
- Base or Root Words
- Bound Bases
- Possessives
- Context Clues
- Multiple Meanings
- Figures of Speech
- Idioms
- Analogies

The Elementary Writing Program (GAP - Writing)

Program Summary

Scholars elementary writing program looks specifically at language mechanics (i.e.capitalization and punctuation), language expression (i.e. grammar, sentence structure, etc.) and composition. The goal of this program is to increase achievement in writing skills and to help students be able to apply these skills to their own writing.

Writing Foundations:

The writing foundations component of the elementary writing program focuses on capitalization, punctuation, and general sentence rules. Depending on the student's instructional level, the following subskills may be presented:

- Capitalization
- End Punctuation
- Commas
- Quotation Marks
- Subjects & Predicates
- Apostrophes
- Abbreviations
- Colons & Semi-Colons
- Hyphen

Writing Extensions:

The writing extensions component of the elementary writing program builds off of the foundations the student is learning and includes concepts to make a student's own writing more concise and interesting. Depending on the student's instructional level, the following subksills may be presented:

- Nouns
- Verbs
- Pronouns
- Adjectives
- Adverbs
- Possessives
- Conjunctions
- Interjections
- Prepositional Phrases

Writing Fluency:

The written fluency component of the elementary writing program develops a student's ability to recognize and create written pieces with a natural flow by using grade-appropriate content, vocabulary, and sentence structure. Depending on the student's instructional level, the following subksills may be presented:

- Forming Sentences
- Paragraph Structure
- Brainstorming
- Topic Sentences
- Supporting Details
- Descriptive Writing
- Narrative Writing
- Expository Writing
- Persuasive Writing
- Research Writing
- Style

Writing Application:

The purpose of the activities included in the application component of the elementary writing program is to ensure that students are able to take the foundational skills developed in the previous three components and apply them to their own written pieces following the writing process:

1. Selecting an appropriate topic
2. Developing and outline
3. Create the first draft
4. Revise the first draft
5. Rewrite the first draft
6. Proofreading and editing
7. Finalize the piece for publication

This component of the program provides an excellent opportunity to capture a student's unique interests when selecting an appropriate topic for each style of writing. Depending on the student's instructional level, the following writing styles may be presented:

- Journal Writing
- Summary Writing
- Narrative Writing
- Descriptive Writing
- Expository Writing
- Persuasive Writing
- Short Essay

The Elementary Math Program (GAP - Math)

Program Summary

Scholars Elementary Math Program focuses specifically on core concepts and skills from within the math curriculum. The goal of this program is to develop students' skills and confidence with a variety of different math streams identified as requiring support from the math assessment, and enable them to transfer these skills outside of Scholars - whether it be to schoolwork or real world scenarios.

Number Sense and Numeration:

Numeration is the understanding of numbers, number systems, and their related operations (addition, subtraction, multiplication, and division).

A well-developed understanding of numbers includes a grasp of not only counting and numeral recognition, but also of a complex system of more-than and less-than relationships, part-whole relationships, and connections between numbers, real quantities, and measures in the environment.

Helping students to understand numbers must always include introducing them to procedures for accurately performing operations with numbers. Students need to develop a "number sense" by mastering key facts and processes.

Measurement:

Measurement lends itself naturally to the introduction of fractions and decimals. It also requires the student to be actively involved in solving and discussing problems. Students compare objects directly by covering them with various units and counting the units. As students develop increasing skills in numeration, they can be challenged to undertake increasingly complex measurement problems.

Geometry and Spatial Sense:

Spatial sense is the intuitive awareness of one's surroundings and the objects in them. Geometry helps us represent and describe, in an orderly manner, objects and their interrelationships in space. A strong sense of spatial relationships and competence in using the concepts and language of geometry can improve students' understanding of number and measurement.

Insights and intuitions about the characteristics of two-dimensional shapes and three-dimensional objects, the interrelationships of shapes, and the effects of changes to shapes are important aspects of spatial sense.

Patterning and Algebra:

One of the central themes in mathematics is the study of patterns and functions. This study requires a student to recognize, describe, and generalize patterns and to build mathematical models to predict the behaviour of real world phenomena that exhibit observed patterns.

Algebra is the language through which most of mathematics is communicated. The language of algebra can be used to generalize a pattern or a relationship or as a problem-solving tool; it is a means of clarifying concepts at an abstract level before applying them.

Data Management and Probability:

The related topics of probability and statistics are highly relevant to everyday life. Graphs and statistics bombard the public in advertising, opinion polls, reliability estimates, population trends, descriptions of discoveries by scientists, and estimates of health risks, to name a few. It includes, but is not limited to, such topics as ratios, fractions, percentages, and decimals.

Optional - Timed Math Drills:

Timed Math Drills are activities that aim to increase the speed and accuracy of numeracy and arithmetic skills.

The Prêt à lire Program

Program Summary

Scholars Prêt à lire program features multiple levels of components, which start at the earliest of French linguists, to logically and sequentially scaffold the skills necessary to be successful in French.

La phonétique (phonics):

Students starting to learn a new language require specific and dedicated worksheets for phonics subconcepts. The student will work on assigned exercises for each subconcept and move on to the next one once the mastery criteria have been met. The subconcepts in each strand are integrated so students don't work through an entire skill level from start to finish before being introduced to a new skill.

Example:

S ➡T ➡ N ➡ Revue: STN ➡ E ➡ R ➡ L ➡ D ➡ Revue: RLD ➡ A ➡ Revue: EA

Hints for teachers:

- For sounds in isolation, the *majority* of the pictures on a page will have the sound
- For review sets, all pictures will contain one of the sounds.

Le vocabulaire (vocabulary):

The vocabulary component ensures that the student can read levelled words, understand what the words mean, and know how to use words appropriately. In this program, the vocabulary sets are thematically based. Additionally, target words from initial activities become non-target words for future activities to reinforce vocabulary development throughout the program.

Example:

Les formes ➡ Les couleurs ➡ Révision: Les formes et les couleurs

Les mots courants (sight words):

Another aspect of this program is sight words. Throughout their sessions at Scholars, students will continue to develop their proficiency with these high-frequency words. Rather than reading the words from a word list, this program contains multiple activities for each word list for a student to demonstrate mastery.

Example:

Liste 1 ➡ Liste 2 ➡ Revue: Listes 1 & 2

Jouer avec les mots (word play):

Since repetition is vital when learning a new language, this course component provides fun and engaging games and activities for students to further practice and build confidence with the words they are learning in the other course components of Prêt à lire.

Activities include: crossword puzzles, word searches, BINGO, Go Fish, word scrambles, memory games, etc.

Example:

Les formes ➡ Les couleurs ➡ Revue: Les formes et les couleurs

The J’aime le français Program

Program Summary

The J’aime le français program seamlessly transitions from our Prêt à lire program and features multiple levels of components to logically and sequentially scaffold the skills necessary to be successful in French.

Le vocabulaire (vocabulary):

The vocabulary component ensures that the student can read levelled words, understand what the words mean, and know how to use words appropriately. Target concepts from initial activities become non-target concepts for future activities to reinforce vocabulary development throughout the program further.

Example:

Les voyelles et les consonnes ➡ L'ordre alphabétique ➡ Révision: L'alphabet

La grammaire (grammar):

Throughout their sessions at Scholars, students will continue to develop their proficiency with isolated grammar concepts. Establishing proficiency with grammar allows students to communicate their ideas and feelings clearly in written and oral communication.

Example:

Le nom commun ➡ Le nom propre ➡ Le déterminant ➡ Révision: Les noms et les déterminants

L'écriture (writing):

With the foundations of phonics, comprehension, vocabulary, and grammar established, this course component provides an opportunity for students to not only gain exposure to conventions, forms, and style when writing but also includes continued opportunities to demonstrate their proficiency with their own written pieces.

Example:

La majuscule et le point ➡ L'ordre de la phrase ➡ Révision: La phrase

La comprehension en lecture (comprehension):

The comprehension activities in this program focus on a number of different subskills organized sequentially, from foundation skills to extension skills. This section allows students to develop the ability to not only decode and read the words in a variety of texts but also process these words to determine meaning from the texts.

Example:

Mettre en ordre ➡ Suivre les directives ➡ ➡ ➡ La cause et l'effet ➡ La fiction et la réalité

Optional - La phonétique (phonics):

Students starting to learn a new language require specific and dedicated worksheets for phonics subconcepts. The student will work on assigned exercises for each subconcept and move on to the next one once the mastery criteria have been met. The subconcepts in each strand are integrated so students don't work through an entire skill level from start to finish before being introduced to a new skill.

Example:

S ➡T ➡ N ➡ Revue: STN ➡ E ➡ R ➡ L ➡ D ➡ Revue: RLD ➡ A ➡ Revue: EA

Hints for teachers:

- For sounds in isolation, the *majority* of the pictures on a page will have the sound
- For review sets, all pictures will contain one of the sounds.

Scholars Program Highlights

- Worksheets are the anchoring foundation for the concept/skill, and are built to reinforce essential pedagogical practices along with valuable skills, strategies, and habits for students:
  - Dating each page
  - Following - and checking off - directions
  - Reading aloud, along with listening skills
  - Active learning - including covering word lists rather than copying from above
  - Directional guidance for teachers
  - Teacher's initials on each page
- Each subconcept has six-eight unique activities before moving back to the beginning of the concepts if not yet mastered, which is flagged by "-R1" being noted in the page number. Therefore, effective mastery marking is crucial for appropriate pacing through the material.
  - **TIP:** review the scoring chart from the Scholars Teacher Training with all teachers
- Concepts are scaffolded to ensure a smooth and natural progression from one level to the next.
- "Small" and "large" reviews throughout each component
- Cross-conceptual integration

Going Beyond

While our programs are inherently cross-conceptual, it's crucial that teachers continue to ***enrich, enhance, and extend*** beyond the worksheets so that they are customized and individualized for each student's specific needs and goals.

Consider:

- Manipulatives
- Whiteboard work
- "Teach the teacher"
- Lots of oral communication extensions!

Mastery Learning

Mastery learning is an instructional approach where educational progress is based on performance rather than time spent. Learners are given multiple opportunities and are assessed repeatedly until they reach the required mastery level. This final level of achievement remains the same for all, but the time to master it can vary.

At Scholars, students in our proprietary curriculum programs shared above achieve mastery of a concept when they are able to achieve **100% on the first two activities** or **four activities at or above 80%**. They then progress to the next concept within that skill. It's important to note that mastery does not imply that they will always remember that concept or never need to review again; it simply means that, at that time, the student had successfully demonstrated proficiency with the concept.

TIP: The Quick Reference Guide: Mastery Learning can be found as an appendix to this Playbook.

High School Program (LTT - *Subject - Grade)*

Scholars High School Program is designed for students who have a strong foundation in all of their basic skills and are functioning at, or close to, their current grade level, and need specific subject support. This program allows students to bring in their own textbooks and homework from school and have guided support from one of our certified teachers or qualified mentors.

During the sessions, teachers will help the student understand and apply the skills required to work successfully through the material. This program can be used for any subject, so long as there is a qualified teacher available. Instead of setting up a specific program, the students ask the teacher/instructor specific questions as they are working through their homework or assignment.

In addition to specific subject support, the Study Skills program may also be incorporated into high school students' lessons.

Study Skills Program

The Study Skills Program is an excellent added value to our programs, and provides skills that all students can benefit from. If this subprogram is added to a high school program, students should spend 10-15 minutes each class on study skills.

Throughout this program, key assignments are designed to introduce students to fundamental study skills and help them to become increasingly more confident in their own skills and strategies. It is imperative that teachers working with students on study skills transfer the strategies and skills learned at Scholars to the work the student is currently doing in the classroom.

Some of the topics included in this program are:

- Goal setting
- Learning styles
- Time management
- Organization
- The study environment
- Concentration
- Active listening
- Memory
- Test preparation
- Essay writing

Test Preparation (OTHER - S)

From time to time, students may be working towards additional testing beyond their traditional high school courses. This could include SAT, ACT, or even courses like pilot training or real estate courses. As long as you have a teacher who is competent and confident in the areas the student needs support on, you are able to offer these programs at your location.

In all cases, students who wish to prepare for these tests are encouraged to purchase their own preparation books from their local bookstore or online since it is crucial that they also be practicing their skills outside of Scholars to achieve the results they are looking for.

GED/CAEC

GED®

The GED is an international testing program for adults who have been unable to complete high school. The GED measures the level of “educational maturity” gained through experience, which is often equal to, or above, the level of a high school graduate.

The GED test covers five core high school curriculum areas: math, science, social studies, language arts - reading, and language arts - writing.

CAEC

As of May 3, 2024, the General Education Development (GED®) high school equivalency program is no longer available in Canada. The new Canadian Adult Education Credential (CAEC) has replaced the GED®.

This new credential is available in English and French, to provide a high-quality, made-in-Canada education qualification as a replacement for the GED®. The CAEC is for adults who do not have a high school diploma but need an education credential to open new doors to educational, training, or employment opportunities.

While the test is the same across the country, please review your local provincial website for more information about how your province will be offering this course. For example, in Ontario, interested individuals will register for this course via TVO Independent Learning Centre (ILC), but Alberta follows a different registration process.

Supporting at Scholars

Before beginning to work on GED/CAEC preparation, students must first complete the CAT-3 Level 18 reading, writing, and math assessments. They are required to meet a minimum grade equivalency of 9.0 to start directly into their GED/CAEC preparation; otherwise, you will enroll them into an elementary reading, writing, and/or math program to fill in the gaps first and foremost so they are able to access the preparation material.

SAT, ACT, etc.

Before beginning their sessions, students preparing for SAT, ACT, or the like should begin by completing a practice test at your location under testing conditions (quiet testing room, time restrictions in effect, etc.) before their first session. This “assessment” would be complimentary just as with all of our other assessments.

Test d’évaluation de français (TEF)

The Test d’évaluation de français (TEF) is an internationally recognized exam that assesses French proficiency for immigration, citizenship, and professional purposes. The TEF Canada is specifically required by Immigration, Refugees and Citizenship Canada (IRCC) for those applying for permanent residency or citizenship. The test evaluates four key skills: listening, speaking, reading, and writing, with a scoring system aligned with the Canadian Language Benchmarks (CLB). Understanding the TEF structure is essential to supporting many adult French students!

Best Practices for Program Planning

1. French Benchmarking Session - Using these assignment worksheets as the foundation, your teacher will determine students' strengths and weaknesses (i.e. comprehension, vocabulary,

grammar, writing, and oral and aural competencies). After the French Benchmarking Session, set clear expectations based on their existing proficiencies.
2. Structure Lessons Around TEF Components – During each session, focus consistently on developing the four areas of the TEF: 1) listening, 2) speaking, 3) reading, and 4) writing.
3. Set Score-Based Milestones – Develop a study plan with measurable goals based on students' required CLB levels.
4. Use Authentic Test Materials – Incorporate past exams and sample questions to familiarize students with test formats.
5. Prioritize Speaking and Listening – Since oral comprehension and expression are heavily weighted, dedicate extra practice time to these areas.
6. Simulate Test Conditions – Schedule mock exams under timed conditions to improve confidence and time management.
7. Encourage Daily French Immersion — To reinforce skills outside of lessons, recommend French media, conversation practice, and reading.

International English Language Testing System (IELTS)

The International English Language Testing System (IELTS) is a globally recognized standardized test designed to assess the English proficiency of non-native speakers. It is widely used for academic admissions, professional certification, and immigration purposes. Like the TEF for French, the IELTS evaluates four key language skills: listening, reading, writing, and speaking. IELTS is available in two formats: Academic, usually for those applying to universities and higher education institutions, and General Training, for individuals seeking work, training, or migration opportunities. Achieving a high IELTS score can significantly impact educational and career prospects, making thorough preparation essential for test-takers. Adult ESL students will often contact Scholars for support with IELTS preparedness.

Best Practices for Program Planning

1. Assessment – Based on the inquiry call, determine the student's English proficiency. No matter the level of English proficiency, choose an assessment level that aligns with their self-reported English knowledge. In addition to their assessment results, have the student converse (generally) with the assessor to determine their strengths in writing, listening, and speaking. After this initial assessment, set clear expectations based on their existing proficiencies.
2. Structure Lessons Around IELTS Components – During each session, focus consistently on developing the four areas of the IELTS: listening, speaking, reading, and writing. Be sure to focus on the "weak areas," monitor success, and allocate extra time to sections where the student needs more support.

3. Use Authentic Test Materials – Incorporate practice exams and sample questions from either the Academic or the General Training tests. Use these materials to guide your sessions.
4. Encourage Daily English Immersion – Promote speaking, listening, reading, and writing at home through real-life interactions and media.
5. Simulate Test Conditions – Schedule mock exams under timed conditions to improve confidence and time management.

Student Binder Assembly

1. Print a *Student Binder Cover Insert* in colour (IQ's Internal Server Documents > Operations - Binder Documents) with the student's first name and last initial, and place it in the front cover pocket.
2. Print the appropriate coloured Scholars Binder Spine (IQ's Internal Server Documents > Operations - Binder Documents) with the student's first name and last initial, and place it in the spine pocket.
3. Use the following chart to assemble the rest of the binder based on the student's program.
    - **Note**: If a student is enrolled in two different programs, they should have two binders to avoid any confusion.

Program	Spine Colour	Front Section	Tab 1: New Activities	Tab 2: Completed Activities
Pre-Reading Readiness or Reading Readiness	• Green	• *All About Me - Grades 1-4* • *Alphabet Anchor Chart* • *Printing Anchor Chart*	• Incomplete activities from last class • Newly printed activities	• All completed and marked activity pages
Elementary Reading	• Green	• *All About Me - Grades 1-4* or *All About Me - Grades 5-8* • *Alphabet Anchor Chart (if applicable)* • *Printing Anchor Chart (if applicable)*	• *Sight Words* (if applicable) • Incomplete activities from last class • Newly printed activities	• All completed and marked activity pages

Elementary Writing	• Green	• *All About Me - Grades 1-4 or All About Me - Grades 5-8* • *Alphabet Anchor Chart (if applicable)* • *Printing Anchor Chart (if applicable)*	• Incomplete activities from last class • Newly printed activities • Lined paper	• All completed and marked activity pages
Elementary Math	• Yellow	• *All About Me - Grades 1-4 or All About Me - Grades 5-8*	• Incomplete activities from last class • Newly printed activities	• All completed and marked activity pages
Prêt à lire or J'aime le français	• Red	• *French All About Me - Grades 1-4 or French All About Me - Grades 5-8* • *Printing Anchor Chart (if applicable)*	• Sight Vocabulary (if applicable) • Incomplete activities from last class • Newly printed activities	• All completed and marked activity pages
High School	• Blue	• *Subject Support Outline*	• Copies of syllabi • Copies of tests, quizzes, assignments for future/further review	• Lined paper and/or graph paper
Test Preparation	• Orange	• Initial Practice Test	• Subsequent Practice Tests • Concept Summary/Study Sheets	• Lined paper and/or graph paper

Course Creation in IQ

For elementary students, you will use the results from their assessment(s) to build the student's individualized coursework for their program as per the following chart and examples.

For students who have completed a CAT-3 assessment, you will use their grade equivalency to determine their starting point. For example, a student who scored at a grade equivalent 2.2 on Reading and Language would start at the first subskill for Comprehension Level 2. Whereas, a student who scored at a grade equivalent of 3.7 on Vocabulary would start at the first subskill for Vocabulary Level 4. If a student scores at a .5 level, the assessor may use their discretion to round up or down in program level. All in all, students should only ever be starting at the beginning of a level or halfway through.

For students who scored at a grade equivalent ***above*** their current grade, they would begin at the next "half-step" level. For example, a student in 5.5 who scored above their current grade equivalency would begin their program at Level 6.

All in all, students should only ever be starting at the beginning of a level or halfway through a level.

Program	Mandatory Components & Starting Points	Optional Components & Starting Points
Pre-Reading Readiness ***(for students who did not master Phonics subtests 1 & 2)***	• Phonics ○ Select phonics gaps as per Phonics Assessment. • Fine Motor ○ Select fine motor skills based on student needs. • Printing ○ Either select all letters or focus on the ones they had difficulty with in the Phonics Assessment and/or Reading Readiness Assessment.	• Mathematics ***(only for students who are up to par with their reading skills)*** ○ Start at the first concept in the list based on the results of the math-related subtests from the Reading Readiness Assessment.

Reading Readiness ***(for students who <u>did</u> master Phonics subtests 1 & 2)***	• Phonics ○ Select phonics gaps as per Phonics Assessment. • Comprehension ○ Level 1: did not master Phonics subtest 3 (Short Vowels). ■ Begin with the first concept in the list ○ Level 2: did not master Phonics subtest 5. ■ Begin with the first concept in the list ○ Level 3: did not master Phonics subtest 6 ■ Begin with the first concept in the list • Sight Vocabulary ○ Select the same level as comprehension. ■ Begin with the first concept in the list • Vocabulary ○ Select the same level as comprehension. ■ Begin with the first concept in the list	• Fine Motor & Printing ○ Fine Motor: Select fine motor skills based on student needs. ○ Printing: Either select all letters <u>or</u> focus on the ones they had difficulty with in the Phonics Assessment and/or Reading Readiness Assessment. • Mathematics ***(only for students who are up to par with their reading skills)*** ○ Start at the first concept in the list based on the results of the math-related subtests from the Reading Readiness Assessment.
Elementary Reading	• Comprehension ○ Use the grade equivalency results to place the student at the appropriate level. • Vocabulary ○ Use the grade equivalency results to place the student at the appropriate level.	***Select for those reading at the grade 4 level or below*** • Phonics ○ Select phonics gaps as per Phonics Assessment • Sight Words ○ In the Sight Words lists, you will cross off any words the student was able to automatically recognize during the Phonics Assessment, and then the teacher will start with the first set of available words.

Elementary Writing	• Writing Foundations • Writing Extensions • Written Fluency • Written Application For students who completed the 1-3 Writing Assessment and received less than 70% overall, they will begin at Level 1/2 in each course component. For students who completed the 1-3 Writing Assessment and received 70% and above overall, they will begin at Level 3 in each course component. For students who completed a CAT-3 Level 14 and above, use the Writing Conventions grade equivalency to place the student at the appropriate level for Foundations and Extensions, and the Language grade equivalency to place the student at the appropriate level for Fluency and Application.	
Elementary Math	• Math Skills 　○ Based on areas indicated on TOS completed as part of the Assessment Record 　○ Then select all concepts after the level assessed - e.g. a student who completed a Level 14, will have all grade 5 skills added to their course.	• Timed Math Drills 　○ Select the appropriate starting point based on the student's instructional level.

Prêt à lire	• La phonétique (phonics) ◦ Select phonics skills based on student needs • Le vocabulaire (vocabulary)* • Les mots courants (sight words)* • Jouer avec les mots (word play)* ** Start at the beginning of the level or halfway through based on the student's current/estimated skills level (not grade level) as guided by the Benchmarking Chart. It is essential for student success that all three of these components begin at the same point within the level.*	
J'aime le français	• La comprehension en lecture (reading comprehension)* • Le vocabulaire (vocabulary)* • La grammaire (grammar)* • L'écriture (writing)* * Start at the beginning of the level or halfway through based on the student's current/estimated skills level (not grade level) as guided by the Benchmarking Chart. It is essential for student success that all three of these components begin at the same point within the level.	• La phonétique (phonics) ◦ Select phonics skills based on student needs.
High School & Test Preparation	There are no course components outlined for these programs. Students and teachers will work together to develop an ongoing plan for each session.	

Assignments Pending Approval

After each lesson, the student's assignment completion must be closely evaluated for appropriate marks and comments before being approved by a director. It is crucial that lessons be approved as soon as possible to ensure that the student's next active lesson is ready for their next class. During this approval step, you will also be marking the attendance for each lesson.

Special note for writing programs: Writing Application activities require students to follow the complete writing process, which takes multiple sessions to complete. While the steps to complete the process are identified in the student's lesson outline, rather than the traditional scoring method of including a score based on how the student did with the material, the teacher must record a **score of 100%** to move onto the next step in the following class. **Directors should pay close attention to the Writing Application activities to ensure a mark of 100% is given if the student is to move forward in the process**

Effective Retention Strategies

Retention starts from the very first conversation you have with a parent!

Inquiry

The initial conversation with the parent has an immense underlying correlation to retention.

1. Did we establish a positive rapport with the parent?
2. Did we ask enough questions to understand their core concern?
3. Did we discuss topics beyond academics, including confidence level, self-esteem, independence skills, homework situation, and how they feel about school?
4. Most importantly, did we ask the parent what their expectations are?

Assessment Review

The assessment review is an opportunity to really connect with the parent and establish a relationship.

1. Are we just providing results from their child's assessment or are we explaining ***why*** it matters?
2. Based on the expectations of the parent stated during the initial inquiry, are they realistic?
3. Are we discussing conferences and why it's important to come in and have these meetings?
4. Was the Team Approach Agreement mentioned and why it's important to work together to reach a child's educational goals?

Programming

If a student is engaged, enjoys coming and sees the benefits, they will continue attending.

1. Ensuring that each student is put on the right program that it is going to challenge them is vital to retention. At no point should the program be "easy".
2. Are teachers empowered to give feedback regarding student's needs?
3. Is reassessing being done accordingly?
4. Are conferences being completed on time?

Teachers

Not only are they critical to retention; they contribute to the overall success of your location.

1. Did we pair the student with the teacher we think they will work best with?
2. Are teachers establishing a positive rapport with the student?
3. Are we having conversations with teachers to make sure it's the right fit and also assessing the table dynamic?
4. Are we following up with the parent after a few sessions to see how their child is finding Scholars and their teacher?

The Standard Conference

After every 12 hours of instruction, prepare for the conference meeting. Every conference meeting is focused on sharing insights from ***the last 12 sessions*** and setting the stage for ***the next 12 sessions***.

Pre-Reading Readiness, Reading Readiness, elementary reading, writing, or math, and Prêt à lire and J'aime le français conferences are generated directly within IQ; whereas, the *High School Conference Report* template is found in the Scholars Google Drive Documents folder.

Conference Reports

Preparation:

- ☐ Schedule a 30-minute Assessment Review Meeting with the family.
    - ☐ **TIP:** Send a Google Calendar invite to confirm the appointment in both your and your client's calendars.
- ☐ On IQ's main dashboard, you will find the Conference Reminders list. Review this list on a weekly basis (i.e. every Friday) to stay in touch with the conferences that are coming due.
    - ☐ **Note**: IQ will add the student's name to your Conference Reminders list two sessions before the conference is due - i.e. a 12-hour conference will be added to the list at the 10 hour mark - to give you approximately a week to prepare the conference report.
- ☐ Once a student's name has been added to the Conference Reminders list, focus the upcoming week on actively reviewing the student's binder, observing their sessions, and reviewing their completed assignment comments in IQ (IQ > Student Profile > Enrollment Actions > View Course > Course Actions > View Completed Assignments) to support effective comments and next steps in the conference report.
- ☐ From the Conference Reminder list, select 'Create Conference'. Based on the Mastery Learning criteria, IQ will automatically generate the list of concepts (for all programs except LTT and OTHER) the student has mastered since the last conference.
    - ☐ **Note:** For LTT or OTHER programs, you will utilize the framework in the *High School Conference Report* template found in the Scholars Google Drive Documents folder.
- ☐ You will add two note blocks by selecting 'Add Notes' - one note block will be labelled **Comments:** and the second note block will be labeled **Next Steps**: like in the Assessment Record.
- ☐ Include appropriate comments and next steps in the student's conference notes blocks - see [Sample Comments and Next Steps](#).

Conference Meeting:

- ☐ Begin every conference by building rapport with the parent(s)/guardian(s)
- ☐ Before presenting the conference report you've generated from IQ already, ask the parent for updates from school, what their child has shared with them recently about attending Scholars, etc.
- ☐ Place the conference report in front of the parent(s)/guardian(s)
    - ☐ **TIP:** Chunk the material that you are presenting to the parent by covering the bottom sections and revealing section by section to ensure they are focused on the topic of discussion.
- ☐ As you go through each section, ensure that the parent has an opportunity to ask any questions they may have.
    - ☐ While you can certainly show parent(s)/guardian(s) examples of a student's work, ***none*** of this material can go home - photocopies, photos, etc.
    - ☐ **NOTE**: At the end of the conference report is a legend summarizing the mastery learning "marks". You can find more information about this information in the Quick Reference Guide: Mastery Learning found as an appendix to this Playbook.
- ☐ At the end of the conference conversation, both yourself and the parent(s)/guardian(s) will sign the bottom of the conference report.
    - ☐ Keep the original for the student's file on location and send a copy home with the parent - either a physical photocopy or an email scanned copy.

Best Practices

- Prepare for every 12-hour conference to keep the information in sync and then schedule the meeting with parents from there.
    - Pre-scheduling keeps everything on track - i.e. at the 12-hour conference, schedule a time for the 24-hour conference and then at the 24-hours conference, schedule a time for the 36-hour reassessment and conference.
- It is usually easiest to ***schedule the conferences during the student's regularly scheduled class time or in a slot adjacent to this time.*** Scheduling conferences during the student's session ensures the parents will not have to make another trip to the location and will be more likely to attend.
    - If the parent insists on having the conference in the Scholars Online Classroom or over the phone, have the discussion first and *then* email them a copy of the conference report.
    - In-person or voice-to-voice conversations will always yield the best results as you are able to clarify any questions the parent(s)/guardian(s) may have in live time, ensure that clear expectations and goals are understood for the next 12 sessions, continue to build the

rapport needed to develop ***competence***, ***credibility***, and ***value***, and get ahead of any concerns they may have to proactively respond so you are not surprised by an exit**.**

- In instances where you've diligently attempted to connect with a parent for a conversation for about two weeks, but have been unsuccessful in securing a time, sending the conference report via email ensures that you are still continuing to honour one of our key competitive differentiators.

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The Reassessment Conference

In addition to the standard conference report, after every 36 hours of instruction, students in Pre-Reading Readiness, Reading Readiness, or elementary reading, writing, or math programs are also reassessed. This reassessment is ***also complimentary and scheduled in addition to their regularly scheduled tutoring sessions.***

Ensure the student is set up for success for the progress assessment. The assessment circumstances should be similar to the initial assessment. If the initial assessment was completed first thing in the morning, the progress assessment should not be after school at the end of the day.

For Pre-Reading Readiness or Reading Readiness programs, the student will complete the Phonics Assessment and Reading Readiness Assessment once again, except in the case where they have moved onto level one materials in their lessons. In this case, you would administer the Phonics Assessment and CAT-3 Assessment as you would with any other student who is no longer reading below the grade 1 level.

For elementary reading, writing, or math, a student's first 36-hour reassessment will be assessed using the ***same level*** assessment as was previously administered, and marked according to the assessment procedures outlined in Chapter 4: Assessments. If the student is still working on the same program at the 72-hour mark, you would complete the appropriate level CAT-3 assessment for that current grade and point in the year.

After completing the progress assessment, prepare the progress report by using the appropriate Progress Assessment Record template (Scholars Google Drive Documents > Assessment Records). After entering the student's initial assessment results, fill in the progress assessment results. On Reading Readiness and 1-3 Writing Progress Assessment Records, you will be able to share the growth with a side-by-side comparison. For CAT-3 Progress Assessment Records, you will calculate the growth by subtracting the initial assessment grade equivalency results from the progress assessment grade equivalency results, and include this grade equivalency improvement in the growth column.

For all CAT-3 assessments, you will add the progress assessment grade equivalencies for each subtest reassessed to the student's profile on IQ.

Sample Comments & Next Steps

Comments

The comments section of any conference report should give a succinct and highly-personalized summary of the ***observations*** you made during the student's last 12 sessions. The comment section will generally not include any specifics about ***what*** the student had difficulty with as this is shown in the concepts mastered chart(s) themselves; rather, the comment section should focus on demonstrating ***how*** their child has grown in their skills, strategies, and habits in the last 12 sessions.

Consider:

- Learning skills - i.e., responsibility, organization, self-regulation, focus, independent work, initiative, collaboration and sociability, openness/eagerness to seek challenges, openness to accepting teacher feedback, understanding classroom expectations (e.g., staying seated, inside voice, etc.), etc.
- Areas of strength - i.e., phonemic awareness, fine motor, oral or written communication, etc.
- Effective strategies - i.e., reading, writing, or math concept strategies, study skill strategies, etc.

This is the perfect opportunity to further establish your competence and credibility by tying in the parent's concerns and observations shared during previous conversations. This paragraph is generally 3-5 sentences long.

Sample Comments:

- ______ has been working diligently at understanding classroom expectations, including ______.
- ______ effectively applies reading strategies like stretching, chunking, and blending independently.
- ______ uses an efficient pencil print to print letters with increased precision and legibility.
- ______ benefits from hands-on manipulatives, including ______, that engage their visual and tactile learning styles.

- ______ has also completed regular writing exercises where they work through the stages of the writing process (e.g., brainstorming, drafting, editing, publishing) involved in different types of writing (e.g., narrative, persuasive, etc.).

- ______ benefits from graphic organizers and other brainstorming aids for inspiration in the brainstorming and drafting stages of the writing process.

Next Steps

The next steps section of the conference report will ***outline the highly-personalized plan, establish goals, and set expectations*** for the student's program. In the end, this section should not only focus on the student's academic goals, but also demonstrate how Scholars programs will support their skills, strategies, and habits for life-long skills - a key retention tool as well. This paragraph is generally 3-5 sentences long.

Consider:
- Learning skills - i.e., responsibility, organization, self-regulation, focus, independent work, initiative, collaboration and sociability, openness/eagerness to seek challenges, openness to accepting teacher feedback, understanding classroom expectations (e.g., staying seated, inside voice, etc.), etc.
- Areas of strength - i.e., phonemic awareness, fine motor, oral or written communication, etc.
- Effective strategies - i.e., reading, writing, or math concept strategies, study skill strategies, etc.
- **TIP:** the strengths that you shared in the comments section will generally help you transition into the areas for improvement and goals.
- **TIP**: If the student is only attending once a week per subject, explain how their areas of growth can be addressed by full-time enrollment.
- **TIP:** If the summer months are nearing, explain how their areas of growth can be addressed by summer learning (e.g., No better time to keep up, catch up, or get ahead!)

Sample Next Steps:

- In the next 12 hours, ______ will be working to effectively apply reading strategies like stretching, chunking, and blending independently.

- In the next series of sessions, we will support ______ to use an efficient pencil print to print letters with increased precision and legibility.

- Now that ______ has mastered all of their vowel sounds, they will now begin to use these foundations to decode more complex unfamiliar words.
- Moving forward, we encourage ______ to ______.
- We are dedicated to supporting the development of ______'s skill in ______.
- To ensure retention over the summer, we encourage ______'s to continue to attend sessions twice a week so they can enter the school year with confidence.

Exit Notice

When a parent notifies the location they're withdrawing their child from the program, it is important to understand why they're exiting rather than simply saying "OK" and writing down their exit date.

Be honest with the parent if you strongly feel the child shouldn't exit. In some instances, you may help a parent realize exiting may not be the best option for their child. Having this conversation may shed light on something simple as a schedule change or program modification to help prevent the exit.

Parents will often want to exit for some of the following reasons:

1. The program is too challenging
2. The program is too easy
3. Financial reasons
4. The child doesn't want to come anymore
5. The child doesn't like their teacher
6. They have found an alternative tutor
7. We have not met their expectations

After speaking with the parent and understanding their reasons for wanting to exit, if you are not able to provide a solution to address this concern, always recommend that the parent come in for an Exit Conference. Use this opportunity to discuss initial assessment results and their child's progression. During this time you can also share any final feedback from the student's teacher and, if the child is exiting on good terms, now is the perfect time to ask for them to leave a review or if they know anyone else Scholars could help.

Summer Preparation

This section includes everything you need to run a fun, engaging summer in your location. It has been designed to chronologically walk you through the steps involved in promoting summer at your location.

Your focus for summer should always be ***increasing the frequency of regular student programs*** since summer is the perfect time for students to catch up, keep up, and even get ahead before the next school year begins with ***increased flexibility*** while school is not in session!

Summary

As demonstrated time and time again, our top performing locations during the summer focus on continuing with their regular tutoring programming with a focus on alternative and flexible scheduling with an individualized approach demonstrating how Scholars can support *their* child[ren] over the summer months - all starting at least three months before the summer starts!

Alternatively, in addition to regular programming, you can offer Scholars week-long half-day summer programming to fulfill a need in your community. This is a “gateway” to a regular tutoring program. **Note:** it does have a lower profit margin and your competition increases as it is not only tutoring companies who enter the summer camp space - i.e. sports organizations, community camps, etc.

Be Proactive

Families need to know that our programs run year-round and that we offer ***flexibility*** to balance their summer schedule, but, more importantly, for them to understand the ***value*** of summer learning and the progress that can be made when students aren’t in the classroom. You can lose a significant amount of your student base for the summer by not being proactive. Parents often fall under the assumption that classes at Scholars only take place during the ten months that students are in school, and unless we tell them otherwise, we are not at the forefront of their minds when they are making their summer plans.

Waiting for your clients to inform you of their plans for summer is not ideal because they often want their child to “take a break” from learning, and once they set their summer schedule, they don’t want to—and may not be able to—move things around to accommodate Scholars. Being proactive in figuring out who will attend and when will allow you to understand your staffing needs and manage staffing costs.

If you are a ***new location or have fewer than 75 students enrolled***, you will want to focus your schedule in your traditional evening hours - from 4-8 pm - to maintain control of your bottom line through optimized table-tightness ratios and teacher costs. If you find that your evening spaces have filled and there is interest for early times, you can start working your way earlier in the schedule an hour at a time - i.e. 3-8 pm, then 2-8 pm, etc.

If you are a location that has ***more than 75 students enrolled*** and there is interest from some of your clients, the summer is the perfect time to provide additional schedule flexibility for families by offering some morning classes.

Increasing the Frequency of Student Hours

You can mitigate any revenue loss by increasing the frequency of your summer clients. Using this method, you can compensate for the lost revenue and even surpass it! For example, if you have 100 clients coming in two hours per week and lose 35 of those clients, you've lost 70 student hours per week. But, if 35 of your existing 65 clients (i.e. just over half) increase their frequency by two hours per week, you have made up your lost revenue. The best way to ensure increased frequency is to begin talking about it with your current clients as early as possible, consistently promote the benefits of increasing frequency during summer, and collect clients' summer schedules.

Additional Possibilities

Themed Weeks

Themes are an easy, inexpensive way to ensure that all students who attend during the summer months - especially those who may not be overly keen on attending over the summer - have a fun, memorable week! Staff and students can dress up according to the theme, and you can choose to incorporate simple and inexpensive decorations. You can even have weekly contests to encourage participation in the theme week. Choose an appropriate theme for all students to participate in and carry that through for the entire week. While some ideas are below, feel free to select the ones that best fit your location:

- Proud to be Canadian (Canada Day) Week
- Wacky Hair Week
- Backwards Week
- Jersey Week
- Superhero Week
- Safari Week
- Crazy Socks Week
- When I Grow Up Week

Scholars Week-Long Half-Day Programming

Some locations may be inclined to offer a host of camps during the summer to compete with other businesses or organizations offering camps. Ultimately, we are not trying to compete with them as students in our program receive ***three hours a day of individualized, accelerated, low student-to-ratio programming, plus engaging in STEM activities every day***! At other community-based programs, students are in higher ratio groups with little personalization and limited capability to offer any academic support.

While Scholars Day Camps provide an excellent opportunity to offer accelerated programming to existing and future "traditional" tutoring students while engaging them in our LEGO STEM program - all while providing a safe and welcoming environment for students to spend half-days for a week at a time, ***this program does have a lower profit margin than regular programming due to the lower hourly rates.***

If you choose to run a summer camp based on an evident need for the families in your community, remember that these camps should be no longer than half-day (i.e. morning or afternoon) and should not include a lunch break to avoid potential licensing issues. Refer to the Scholars Day Camp Program Guide in IQ's Internal Server Documents for more information on Scholars-approved day camp programs.

If you are interested in running an alternative camp to the pre-approved camp plan from Scholars, please submit your unit and lesson plans, clearly indicating the timing, ratios, and resources being used via a Help Desk Ticket for the Operation Team to approve prior to advertising and submitting any Marketing Requests. Please be mindful of the *Child Care and Early Years Act, 2014* when considering alternative camp structures. For example, day camps in Ontario serving children who are younger than four years of age require a child care licence. This places an emphasis on protections and standards for young children as they are a more vulnerable population.

Preparing for the Summer

Beginning at least three months before summer starts, it's time to hyper-focus on summer in every conference, phone conversation, email, and interaction with your clients and prospective clients - although summer should be discussed in every enrollment conversation no matter what time of the year it is!

The goal is to ensure clients know that summer means ***"business as usual"*** at Scholars and is a great opportunity to catch up, keep up, and get ahead for the next school year. You want to receive summer schedules as soon as possible so you know your potential revenue for the summer months and to allow for adequate staffing.

Tips for Selling Summer

1. Remind clients to provide their summer schedules — the earlier, the better
    - Run in-location promotions that encourage students to bring in their summer schedules
        - Example: "Bring in your summer schedule by May 1 to receive 25 bonus stamps!"

- **TIP**: Submit a Marketing Request for a location-specific summer schedule calendar <u>or</u> create a Google Form to collect schedule information.

2. Encourage accelerated/intensive programs

- Accelerated/intensive programs mean students attend more hours per week during the summer. These accelerated programs can be particularly useful for catching up with remedial students before the new school year so they can start at grade level and with more confidence in their knowledge and abilities.
    - You can offer summer "incentive" pricing to reward families who attend more than eight classes/month. For example:
        - Minimum of 8 classes/month = $400 ($50/hr)
        - Minimum of 12 classes/month = $570 ($47.50/hr - 5% savings)
        - Minimum of 16 classes/month = $720 ($45/hr - 10% savings)
- Encourage families to schedule two-hour sessions when they know there will be breaks in the student's summer schedule. For example, 24 hours can be completed in just 12 two-hour sessions in the 70 days during the summer months. Similarly, 48 hours can be completed in just 24 two-hour sessions, making it easy to accommodate a week at the cottage or other times the student might be away.

3. Promote the benefits of additional programs

- Study skills programs are ideal for students entering high school or post-secondary. They help with transitions and ensure students have the skills they need to succeed.
- Enrichment programs provide a good transition for next year, which results in a more confident child in September.
- Scholars classes are great for children transitioning into grade one, where they will have to sit for longer periods in a "traditional" classroom environment.
- Reach out to previous summer students, exited/on hold students, and leads to promote Scholars' summer programs.

Director Talking Points

- *"Since information and skills need to be consistently repeated to be retained long-term, students lose, on average, at least one month's worth of school-year learning. This loss is even greater with math skills."*
    - *"This means that in the 12 years Canadian students spend in school, 12 months (over one school year) is dedicated to reteaching and relearning concepts and skills forgotten over the summer break."*
- *"We understand that summer is a busy time, and we will work around your child's unique schedule to ensure they receive the learning they need to catch up, keep up, or get ahead."*

    - *"16 hours is only 1% of your summer!"*
- *"Students love summer learning, especially those who enroll in our accelerated programs! Summer is a stress-free time to learn because students don't have competing homework assignments, student-teacher tensions, classroom distractions, school sports teams, or other school-related frustrations and distractions."*
- *"Summer is the best time to catch up, as it is easier to close the gap when other concepts and skills are not moving forward."*

Summer Timeline

Every location's summer plan will be customized to meet the needs of your clients and community, but following the outline below will ensure you are on track for a well-planned, successful, and profitable summer. What's important is that you are ***proactive*** in encouraging current, non-enrolled, on-hold, and exited students to attend - don't wait for them to come to you!

Four Months Ahead of Summer

- [ ] Set your location's summer goals.
- [ ] Send a general email to all enrolled clients via the steps outlined in the *Marketing Guide* via a Marketing Request informing them that the location will be open for the summer. Include the summer programs and availability you are offering.
- [ ] Choose weekly themes and send in Marketing Form Requests for themed marketing materials.

Three Months Ahead of Summer

- [ ] Discuss the value of attending over the summer and the benefits of accelerated programming during all conferences and to all newly enrolled students.
- [ ] Explain to your staff (especially tutors) their role in promoting summer learning at Scholars while at the teaching tables - you can even add this as a Course Note in IQ.
- [ ] Assess the number of confirmed students and the staffing needs when considering all scheduled absences, extra classes, and additional programs offered.
- [ ] Speak with current staff and determine who would like to work and any vacation plans they may have
- [ ] Post for available positions if required.
- [ ] Call and email current, exited/on-hold, and unenrolled leads to invite them to attend Scholars this summer. This is a great time to catch up with clients and be at the top of mind when report cards are released in June.
- [ ] As you receive summer schedules, keep IQ updated so you are organized heading into summer.

Chapter 9: Seasonal Preparation

Two Months Ahead of Summer

- Post all summer marketing materials in the lobby.
- Hold a staff meeting to discuss summer.
- Begin calling current clients who have not yet confirmed their schedule for the summer. If parents are still unsure of their plans, set up a follow-up call in your Google Calendar.

The Month Before Summer Starts

- For any current students who have not confirmed a schedule, follow-up with parents.

Summer

- Make plenty of social media posts regarding STEM, the themed weeks, and the fun of summer learning!
- Ensure you have a mid-summer conference with each of your clients around late July or early August.
    - The goals of this conference are:
        1. to discuss the student's progress made thus far in the summer,
        2. to discuss the student's goals for the rest of the summer, and
        3. to encourage clients to commit to continuing into the fall by showing them the value of continuing with Scholars into the school year.

      Note: There is no need to have clients complete another Enrollment Form for the fall. Simply adjust their schedule in IQ and confirm with them by sending them an email.

Start of a New School Year

- Set some time aside during your last L10 of the summer or the first L10 of the new school year to reflect on summer. It's easier to think about these things right after summer when everything is fresh rather than waiting until next spring. Consider the following questions:
    - What went well?
    - What didn't go well?
    - Did you meet your summer student, revenue, or service hour goals?
    - What will you need to change to make next summer more successful?

Scholars Half-Day Camp Program

The Scholars Half-Day Camp Program provides an excellent opportunity to offer accelerated programming to existing and future “traditional” tutoring students, while engaging them in our LEGO STEM program - all while providing a safe and welcoming environment for students to spend half-days for a week at a time. This is a great feeder program for our traditional after-school tutoring, so don’t forget to discuss it with parents as well!

It's important that we continue to deliver an exceptional Scholars experience with this program, and show clients how Scholars is different and goes above and beyond. From the continued small class sizes to our Assessment and Enrollment Meetings, providing a high-quality experience will ensure your programs are successful and lead to referrals and a continued positive reputation in your community. This is a unique opportunity to support families in your community, so ensure you make the most of it!

The half-day camp program outlined below is pre-approved for immediate use at any location. If you have other ideas for your camp, we’re here to listen! Please share your ideas with the Operations Team before sharing or requesting any marketing collateral.

Organizing Camp “Pods”

Each group of students and teacher(s) will form their own ***pod***. When organizing each pod, consider the grade levels and subject areas of the students. We recommend grouping students in Grades K-2, Grades 3-5, and Grades 6-8 to align with the grade recommendations in the LEGO kits.

Ratios & Teachers

This program will be run at a 3:1 student-to-teacher ratio. Just like your regular programming, you will want to ensure that the teacher who is assigned to each pod is confident and competent with Scholars programming for each student and the LEGO Education curriculum. The 3:1 ratio shows new clients exactly what to expect in any of our year-long traditional programming, which leads to an easier transition and retention of new students. This also allows for you to run this program at the same time as any other regularly scheduled students during your daytime hours.

Pricing

- We suggest $400/week for half-days, Monday - Friday. This price is a suggestion - each centre can choose their price point based on the research conducted on their local market. However, a few notes to consider:

- While this is potentially more than other community-based programs, we are ultimately not trying to compete with them. At Scholars, ***students are receiving three hours of individualized, accelerated, low student-to-teacher ratio programming plus engaging STEM activities every day*** for only $80! At other community-based programs, students are in higher ratio groups with little personalization and limited capability to offer any academic supports.
- In the end, for every week of half-day programming, students are receiving 10 hours of academic support with five hours of STEM - that is more than one month of traditional programming in just one week!

Assessment & Enrollment

All new students who enroll in this program are assessed so you can better understand their learning strengths and weaknesses. This will help the teachers when working with the students, while also allowing you to promote the traditional tutoring support outside of their camp week(s).

Note: it is ***strongly*** recommended that new students attend a minimum of two weeks focusing on a single subject so you are able to truly demonstrate the value of our program and have the student be able to make significant progress towards their goals.

All students in Day Camp will have the same paperwork on file: Student Information Form and Enrollment Form.

Sample Half-Day Schedule

1:00 pm - 1:50 pm	**Scholars Program - Part 1** *Students work on their Reading Readiness or GAP program.*
1:50 pm - 2:10 pm	**Break Activity** *Students will bring a healthy snack with them. While eating their snack, they will engage in a short activity of the teacher's choosing based on the age level and interests of the pod. Some ideas are listed in the Break Activities section below.*
2:10 pm - 3:00 pm	**Scholars Program - Part 2** *Students continue working on their Reading Readiness or GAP program. If a student is enrolled in two full-time programs outside of the camp, they could switch to their second program for this section as well.*

3:00 pm - 4:00 pm	**LEGO STEM Session** *At the beginning of the week, select a unit that is appropriate for the age and ability level of each pod. Using the pre-established unit and lesson plans (Quick Reference Guide for each LEGO kit available in IQ's Internal Server Documents > STEM), the teacher will guide students through a unit throughout the week.*

IQ

When enrolling a student in a Scholars Day Camp, you will enroll and schedule their hours based on their program(s) for the first two hours and then enroll and schedule the third hour as **STEM**.

Note: in IQ, the functionality exists to create another recurring schedule at a different rate, which allows for ease in scheduling students who are attending both a traditional tutoring program and a Day Camp program.

Break Activities

When selecting break activities for your classes, consider including a variety of activities over the course of the week, e.g. some physical activities, some science-based activities, some virtual tours, etc. This will keep the students engaged even during their downtime.

Physical Activities
- Yoga
  - Example: Cosmic Kids Yoga
- Sidewalk Chalk Obstacle Course
  - Example: Movement and Learning Obstacle Course
- Other Sidewalk Chalk Activities
  - Example: Sidewalk Chalk Games and Activities

Arts & Crafts Activities
- Colour Pages (can be based on a weekly theme)
  - Example: Free Colouring Pages from Crayola
- Craft (could be based on a weekly theme)
  - Example: Crafts for Kids
  - Example: Crafts for Tweens and Teens

Science Experiments
- Science Experiments for Kids
- Science Experiments for Kids and Teens

Sponge Activities
- "Sponge" Activities from Scholastic

Short Writing Activities
- Journal Writing Prompts for All Ages
- 365 Creative Writing Prompts
- Lots and Lots of Writing Prompts

Podcasts
- Ear Snacks (Best for: Little Kids)
- Smash Boom Best (Best for: Big Kids)
- Brains On (Best for: Tweens)

- All Songs Considered (Best for: Teens)
- But Why, A Podcast for Curious Kids (Best for: All Ages)
- KidNuZ (Best for: All Ages)
- Wow in the World (Best for: All Ages)
- Throughline (Best for: High School)

Virtual Tours

- Virtual Tours of Museums, Zoos, and Theme Parks
- Virtual Tours of Museums, Parks, and Cities
- Ontario Virtual Tours
- Banff and Lake Louise Virtual Tours
- British Columbia Virtual Tours

Human Resources

A location's teaching staff is one of the most important factors to every location's success. As a result, it is crucial to create a positive work environment where your staff feels empowered to make decisions, raise concerns, and are free to provide feedback.

Steps to Building a Positive Environment

- **Develop relationships:** Get to know your staff beyond their qualifications. Spend the time before and after their shifts to initiate conversations, provide any support or guidance, and get to know them on a human level.
- **Be accommodating.** We often ask for a lot of flexibility from our staff as we try to accommodate our clients. We need to ensure that we try to be flexible for staff requests for time off as well. Therefore, it is important to have a clear policy regarding this while being compassionate to schedule changes that are out of their control.
- **Schedule regular staff meetings and workshops:** Not only does this ensure your team is always on the same page and collaborating with one another, but it also gives an opportunity for staff to socialize and build relationships with one another. Go a step further and have teacher input on topics to cover or even lead a portion of the workshops
    - **TIP:** Plan to hold at least one staff meeting/workshop every quarter. Even tie it into a social opportunity (snacks, social activity, sporting event, etc.) to further build your team's camaraderie!
- **Don't underestimate the power of saying 'thank you':** Be appreciative of their time and energy! Celebrate them on their birthdays, with Teacher of the Month, and any other accomplishments in their lives.
- **Always be interviewing:** This will alleviate the stress your staff feels with any sudden resignations. Additionally, this will help you improve your interviewing skills.

Getting Started: The Hiring Process

Step 1: Develop Job Descriptions

- There are a number of job posting templates available for the following positions in IQ's Internal Server Documents > Operations - Human Resources:
    - Part-time Teacher
    - Full-time Education Director/Centre Coordinator
- Before posting the job, be sure to modify the description accordingly with your location's requirements.
- Post jobs on Indeed, LinkedIn, and any other respected, professional platform. If you are located near any universities or colleges, this is a great resource to find specialized subject teachers and/or students in teacher's college.

Step 2: Develop an Ongoing Applicant Pool & Filter Potential Candidates

- Advertise for the potential positions on a regular basis and update job postings monthly.
- When you receive new resumes, ensure you review the resumes and set folders up in your location's Google Drive to store the resumes of those candidates who have piqued your interest from the very beginning for elementary, secondary math and science, secondary English, and French.
- For those who you are interested in after your initial resume filter, ask them to complete a *Prospective Teacher Qualification and Availability Statement* (IQ's Internal Server Documents > Operations - Human Resources). This will help with filtering potential candidates based on teachables and availability.
- Regardless of vacancies, you should conduct interviews on a regular basis. Regular interviewing will prevent undue stress when unexpected vacancies arise, and it will also help improve your interviewing skills.

Step 3: Review the Candidates

- Review completed *Prospective Teacher Qualification and Availability Statements* and determine whose teachables and availability best matches your location's requirements.
- Review resumes and cover letters to ensure applicants meet certification requirements.
- Verify the candidates' distance from the location. Ideally, you will want to avoid moving forward with a candidate whose drive is more than 30 minutes.
- Schedule a telephone interview through email. Give the applicant a few options for dates/times.

Step 4: Telephone Interview

- Conduct a telephone interview using the *Telephone Interview Questions* (IQ's Internal Server Documents > Operations - Human Resources).
  - **TIP:** Budget 10-15 minutes for this telephone interview.
- The objective is to screen potential candidates to see if they should receive a full interview.
- During this call, evaluate candidates' verbal communication skills and general personality.
- Explain the specifics about the current position you are interviewing candidates for - e.g. elementary teacher to work Mondays and Wednesdays from 4 to 8 p.m.
- If the candidate satisfies your requirements, schedule an in-person interview.

Step 5: In-Person Interview

- Conduct a full interview using the *In-Person Interview Questions* (IQ's Internal Server Documents > Operations - Human Resources).
- Review the candidate's resume, notes from the telephone interview, and interview questions in advance.
- A great interview will consist of the candidate speaking the majority of the time and the interviewer being an active listener.
- Throughout the interview, you should be able to evaluate their personality, professionalism, core competencies, and passion.
- After the interview questions, you should always administer proficiency tests for prospective teachers.
  - For example, if they say they can teach grade 12 physics on the *Prospective Teacher Qualification and Availability Statement*, then have them complete select questions from a grade 12 physics exam, as well as having them teach you the concepts so you feel confident they not only know the information, but they are able to teach it.
- After the interview, review their answers to both your interview questions as well as the proficiency tests. Ask yourself:
  - Will this candidate add value to the location?
  - Do they have the interpersonal skills to build relationships with students?
  - Are they passionate about teaching?
- If they're a strong candidate, ask for two references prior to them leaving.
- Always thank them for their time and explain the next steps.

Step 6: Reference Check

- If you're planning to move forward and hire the candidate, a *Reference Check Form* (IQ's Internal Server Documents > Operations - Human Resources) should be completed immediately with the two references the candidate provided.

Step 7: Offer of Employment

- Contact the successful candidate via email to officially offer them the position, and suggest a time for them to come in to complete paperwork and set up their training schedule if they accept.
  - Ask them to bring in a new Vulnerable Sector Police Check (VSPC) or get them to begin this process.
  - ***Note: As a requirement of Scholars insurance, all staff members (if not currently employed by a school board) are required to have a VSPC on file with Scholars.***
- Prepare the *Employee Information & Payroll Form* (IQ's Internal Server Documents > Operations - Human Resources), *Employment Agreement (Scholars Google Drive Documents > Human Resources)*, *Scholars Employee Handbook* (IQ's Internal Server Documents > Operations - Human Resources), tax forms, and any other required documents for your location. Each employee must have all of these items in their file before being given access to any Scholars material, including training documents.
- Once these documents have been completed, discuss a training date and future scheduling.

Step 8: Staff Training

- Organize your new staff member's training schedule.
  - **Note:** all staff receive pay for all training hours either in- or out- of the centre.
- Keep in mind that all staff should experience a gradual release of responsibility. Staff must be given enough time to work through and absorb the information and systems you are asking them to apply. Therefore, you must allow appropriate training time before a teacher starts with their own group of students.

Focused Instruction ➨ Guided Instruction ➨
Collaborative Learning ➨ Independent Learning

Step 9: Identify Potential Vacancies and Teaching Needs

- It is important to consistently evaluate and identify potential vacancies.
- April is a great time to start thinking ahead for the next school and staffing needs for the location. This is also a great time to ask current staff what their plans are for the summer.
- First, speak with current staff and determine their plans for the fall. If they're continuing employment, are they keeping the same schedule or will their availability be changing?
- Once you have determined which of your current staff are staying, create job postings for positions that need to be filled. It's important to start this process early as you want to ensure you hire the best candidate for any vacancies.

- Ensure you are constantly evaluating your teachers' capabilities and strengths. Conduct performance reviews regularly.
- When a staff member has just joined your team, complete mini-performance reviews monthly during their probation. After their three-month probation, performance reviews should be completed every six months.

Teacher Training

Pre-Training

Before starting their training, you will need to create a user ID and password for the teacher on IQ. You will then share the *Scholars Teacher Training* slidedeck (Scholars Google Drive Documents > Human Resources) with the teacher to complete prior to any observation hours. This can either be completed in-location during their introductory training session (preferred) or at home prior to their introductory training session in-location (alternative).

Introductory Training Session

Tour

During your first training session with the new teacher in the location, start by taking them on a tour, highlighting areas in the location and their key features:

- Lobby
- Classroom(s)
- Washrooms
- Kitchenette (if applicable)
- Scholars Store
- Manipulative Shelf
- Teacher Resource Shelf
- Tablet Storage
- The Island (student binders, tablet storage, etc.)

Centre Specific Policies & Procedures

While our standard policies are outlined in the *Employment Agreement* and *Employee Handbook* the new teacher has already signed, it is important to outline any specific policies or procedures of your location. This could be connected to items like punctuality expectations, cleaning of their station, outlining expectations for if a parent catches them at the door, who goes to the door to let students in/out, etc.

Observation Hours

After understanding the Scholars system and your location as a whole, new teachers will complete a number of observation hours. This is an opportunity to see the progression of the teaching hour, familiarize themselves with the binders and curriculum, and learn how to effectively manage our small group table ratios.

To start, new teachers should spend a couple of hours just observing. Provide them with paper and a pen to make notes as they observe a mentor teacher. Next, they will move on to sitting with a different mentor teacher and working with one of their students. The mentor teacher will be able to answer any questions and provide guidance along the way while the new teacher can begin to apply their knowledge gained from their pre-training and previous observation hours.

The Initial Solo Teaching Hours

Once you are confident that the new teacher is ready to begin teaching their own table, start with a low student-to-teacher ratio - ***a maximum of 2:1*** - while they continue to build their skills and confidence.

During these initial teaching sessions, a member of the management team should be observing and supporting the teacher. Appear busy so as to not intimidate the new teacher and make notes on the teacher's ability to handle to following:

- Preparation for the hour
- The ratio
- The curriculum and program
- The end-of-class transitions

Once the shift has been completed, meet with the new teacher to discuss their first sessions. Ensure you are providing more positive than negative feedback during this time and review the two most important changes or additions you would like to see for next time. Be sure to give positive feedback next session when they apply these changes!

Sample Introductory Training Schedule

- Day 1: 4-5 hours
  - [ ] Completion of any final paperwork
  - [ ] A tour of location
  - [ ] Two hours to work through the Scholars *Teacher Training* slidedeck (Scholars Google Drive Documents > Human Resources) with engagement after each section - binder, IQ, manipulatives in-centre, etc.
  - [ ] Then, a couple of hours focusing on ***observing*** mentor teacher(s)
- Day 2: 3-4 hours
  - [ ] Shadowing with mentor teacher(s) and beginning to ***engage*** with the students, curriculum, and IQ

- First solo teaching day:
    - [ ] Only schedule them for a couple of hours with a max of two students at the table. A director should be readily available and monitoring from the island for support.
    - [ ] **Note:** At the end of each session for the first few weeks, the Director should touch base to answer questions, provide feedback, and next steps

Ongoing Training

Teachers are not trained after just a couple of sessions - in fact, just like our students, teachers should continuously be learning. They will need ongoing training for the first two to three months depending on the number of shifts they receive. After this time, they should be having biannual performance reviews.

The Performance Review

Preparation & The Observation Hour

- Prepare for the Performance Review by gathering any previous performance reviews and feedback forms from the teacher's regular students/parents.
- Schedule an observation hour. Remember to always look busy while doing this.
- Provide the teacher with the blank template to record their self-evaluation before adding your notes and comments to it prior to reviewing the results with your teacher.
- Ensure you allow enough time to allow for a detailed discussion.

The Performance Review Meeting

- Start by making the teacher feel comfortable. This is not something that either one of you should dread. This is an opportunity to continue to learn and grow.
- Ask the teacher to discuss their greatest improvement or accomplishment over the past few months. Take notes on this.
- Discuss the teacher's portion of the review first and then present your portion of the review. Be sure to include more positives than negatives. Highlight only a few areas of opportunity.
- Be sure to end on a high note. The purpose of a performance review is to motivate the employees and encourage them to continuously work toward bettering themselves.

Chapter 11: Daily Operations and Location Organization

Daily Operations

On-Site Greeting & Student Safety

Every time someone enters your location, it's important to go to the lobby and greet them - by name, if they are an existing client. We can sometimes become complacent with our existing clients and staff, and just wave them through.

While sessions are taking place, it's important to have the lobby-to-teaching space door closed and have someone from the team designated to be at the door to manage the comings and goings of students. Students should never simply walk into the space or out of the space.

This closed door policy also ensures that there is a physical barrier to deter parents/guardians from walking in and addressing your teachers. The designated director for the door is there to handle any questions or concerns from parents so that your teachers can focus on administering the best sessions possible with their students each hour.

The Rule of Two

Aligned with having a director dedicated while sessions are happening to monitor the comings and goings of students, the Rule of Two is another important policy to adhere to. The Rule of Two requires that ***no fewer than two <u>unrelated</u> adults*** be present at all times with a child in the location. The main purpose of the two-adult rule is to increase accountability and decrease isolation. There are many benefits to having two sets of adult eyes on any given situation with a child, including:

- Significantly reducing the risk of an incident of abuse
- Protecting against false accusations
- Reducing liability and a possible claim of negligence
- Offering additional help if there is an accident or emergency

Hours of Operation

The minimum hours of operation are located within your Franchise Agreement; however, it's important to consider extending these minimum hours as locations who have more in-centre open hours experience better lead generation, as clients are more likely to connect with a location that is currently open if they are searching Google for" tutoring near me", along with Google's search algorithm putting search preference on actively open locations.

Chapter 11: Daily Operations and Location Organization

Your hours of operations are posted on the ScholarsEd.com website, on your location's Facebook Page, on your location's Google Business Profile, and on the sign hanging on the door of your unit. For the best user experience, it's crucial that you update your hours to be the same in all locations.

How to Update your Hours of Operation:

Website: submit an Marketing Form Request with your updated hours of operation
Google Business Profile: https://support.google.com/business/answer/15300403?hl=en
Facebook: Follow these instructions.

Voicemail

A branded custom voicemail greeting is crucial for businesses as it enhances professionalism, reinforces brand identity, and improves the overall customer experience. It provides a consistent brand message, builds trust, and can even improve customer satisfaction by making callers feel acknowledged and valued. Sample *Voicemail Suggestions* for different seasons of the year can be found in IQ's Internal Server Documents > Operations - Operations Documents.

Scholars Success Checklist

In the Scholars Google Drive Documents folder > Strategy & Success Templates, you will find the *Scholars Success Checklist*. This is a fantastic tool that you can customize (add, remove, colour-code, etc.) to keep your team on track with core daily, weekly, and monthly tasks.

Location Analysis

At least once a year, it's a best practice to complete a self-audit of your location's performance using the *Location Analysis Report* (IQ's Internal Server Documents > Operations - Operations Documents.

Filing Cabinet & Folder Organization

Bottom Desk Drawer Organization:

- Letter hanging file folders with labelled manila folders
  ***Note**: titles in italics require printing from IQ > Internal Server Documents.*

Hanging Folder Grouping	Labelled Manila File Folders
1	○ *Assessment Flow Charts (1 copy)*

	○ *Assessment Observation Record* (25 copies)
2	○ Phonics Assessment (1 copy of *Phonics Assessment)*
	○ Phonics Assessment - Instructions, Scoring, and Answer Key (10 copies of *Phonics Assessment - Assessor Instructions, Scoring Record & Answer Key*)
3	○ Reading Readiness Assessment (10 copies of *Reading Readiness Assessment*)
	○ Reading Readiness Assessment - Instructions, Scoring, and Answer Key (10 copies of *Reading Readiness Assessment - Assessor Instructions, Scoring Record & Answer Key*)
4	○ 1-3 Writing Assessment (10 copies of *1-3 Writing Assessment*)
	○ 1-3 Writing Assessment - Instructions, Scoring, and Answer Key (10 copies of *1-3 Writing Assessment - Assessor Instructions, Scoring Record & Answer Key*)
1	○ *CAT-3: Level Assignments, Test Subjects, and Test Times* (1 copy)
	○ CAT-3: Norms Book
2	○ *CAT-3: Scoring Chart* (15 copies)
3	○ CAT-3: Level 11 - Test Directions & Answer Key (1 teacher instruction booklet and 1 answer key)
	○ CAT-3: Level 11 - Student Books (10 student booklets)
4	○ CAT-3: Level 12 - Test Directions & Answer Key (1 teacher instruction booklet and 1 answer key)
	○ CAT-3: Level 12 - Student Books (10 student booklets)
5	○ CAT-3: Level 13 - Test Directions & Answer Key (1 teacher instruction booklet and 1 answer key)
	○ CAT-3: Level 13 - Student Books (10 student booklets)
6	○ CAT-3: Level 14-19/20 - Test Directions & Answer Sheets (2 teacher instruction booklets and 50 Scantron answer forms)
7	○ CAT-3: Level 14 - Student Book & Answer Key (1 student booklet and 1 answer key)

	○ CAT-3: Level 15 - Student Book & Answer Key (1 student booklet and 1 answer key)
8	○ CAT-3: Level 16 - Student Book & Answer Key (1 student booklet and 1 answer key)
	○ CAT-3: Level 17 - Student Book & Answer Key (1 student booklet and 1 answer key)
9	○ CAT-3: Level 18 - Student Book & Answer Key (1 student booklet and 1 answer key)
	○ CAT-3: Level 19/20 - Student Book & Answer Key (1 student booklet and 1 answer key)

Lateral Filing Cabinet Organization:

- Top drawer: (for active documents, staff, and students)
  - Letter hanging file folders with labelled manila folders
    - Left side - Enrollment [ENROLL], Human Resources [HR], Binder Creation [BINDER], and Celebrate [CELEBRATE] folders
      ***Note**: titles in italics require printing from IQ > Internal Server Documents.*

Hanging Folder Grouping	Labelled Manila File Folders
1	○ [ENROLL] Inquiries: Active
	○ [ENROLL] Inquiries: Stale
2	○ [ENROLL] *Inquiry Form* (25 copies)
3	○ [ENROLL] *Student Information Form* (25 copies)
4	○ [ENROLL] *Enrollment Form* (25 copies)
1	○ [HR] Prospective Staff Resumes
	○ [HR] *Teacher Qualification & Availability Form* (25 copies)
2	○ [HR] *Telephone Interview Questions* (25 copies)
	○ [HR] *In-Person Interview Questions* (25 copies)
	○ [HR] *Reference Check Form* (25 copies)

3	○ [HR] Interviewed; Not Proceeding
4	○ [HR] *Employee Information & Payroll Form* (25 copies)
	○ [HR] *Employee Handbook* (25 copies)
1	○ [BINDER] *All About Me: 1-4* (25 copies)
	○ [BINDER] *All About Me: 5-8* (25 copies)
2	○ [BINDER] *Tout sur moi: 1-4* (25 copies)
	○ [BINDER] *Tout sur moi: 5-8* (25 copies)
3	○ [BINDER] *Scholars Stamp Tracker* (25 copies)
	○ [BINDER] *Subject Support Outline* (25 copies)
4	○ [BINDER] *Alphabet Anchor Chart* (25 copies)
	○ [BINDER] *Printing Anchor Chart* (25 copies)
1	○ [SUPPORT] *Operations Playbook*
2	○ [SUPPORT] *Local Marketing Playbook*
	○ [SUPPORT] *Summer Playbook*
	○ [SUPPORT] *Half-Day Camp Program Guide*
3	○ [SUPPORT] *New Reading Readiness Programs Guide*
	○ [SUPPORT] *New French Programs Guide*
4	○ [SUPPORT] *Mastery Learning Criteria*
1	○ [CELEBRATE] Scholar of the Month (12 copies)
	○ [CELEBRATE] Teacher of the Month (12 copies)

- Right Side - Student Folders [STUDENT]
    - One hanging folder for each letter of the alphabet - student folders will be added here alphabetically by last name

Storage Cabinet Organization:

- Upper Storage:

    - LEGO Education Sets
    - Extra Scholars Parent Guides
    - Extra Scholars Enrollment Folders
    - Ballot Box (until needed)
    - Extra teaching supplies (pencils, pens, etc.)
- Lower Filing Drawers: (for inactive students, staff, and other administrative files)

IQ Tools

IQ provides you with a variety of tools for successful daily operations. Along with your email and Google Calendar, IQ will be open on your computer at all times. You will use IQ to:

Track Leads

Enter ***all*** leads into the system. There is no such thing as a “bad” lead - although someone may not be interested in the Scholars Solution at this time, by having their information recorded in your IQ, you will be able to connect with them again down the road with a new program offering or at a better time for them. Ensure that you provide detailed notes and schedule follow-ups.

Schedule Assessments and Trial Hours

In addition to using your location’s Google Calendar to schedule assessments to ensure there are no double bookings, you will also enter this information into IQ. Use the details from the assessment chapter to determine the length of time needed to complete each assessment. However, generally speaking, you will schedule **1.5-2 *hours for students six and older*** and ***one hour for students younger than six.*** Since this is usually the first interaction with a parent and student, they should not feel rushed at any time.

Track Student Attendance, Programs, Conferences

After the initial entry, IQ will track and update the student’s program based on the scores provided by the teacher, which a director will ultimately approve, and prepare the assignment set for the next class. It will also provide reminders for conferences.

Every student’s pacing and progress through their individualized program is dependent on the accuracy of the scores that are entered for every assignment they complete. As such, it’s important for a director to spend sufficient time truly reviewing each assignment set, and making any necessary adjustments to the marks or comments before the assignment set is submitted and locked.

To ensure that a student's next assignment set is always ready, it's a best practice to approve every assignment set in IQ (Assignments Pending Approval) either as sessions are taking place every day or at the beginning of the next day. This enables you to accommodate any last-minute schedule/make-up requests by clients.

When submitting every assignment set, the director will also be selecting the attendance for the session. There are three options when submitting in Assignments Pending Approval: attended, no show, or make-up (i.e. make-up session owed).

TIP: If you have a student who is completing a two-hour session due to scheduling a make-up session in advance of their regularly scheduled session, for example, you must have a director ready to approve the first assignment set for the first hour before IQ can release the second assignment set for the second hour for assignment page printing, teacher's entry of marks and comments for that hour, and marking the attendance for the second session.

Day View/Week View

Day View/Week View are two versions of your location's master schedule, with visual indicators to help track session statuses quickly.

Visual Indicators:

- Staff shifts will display as the colour set in their Teacher Profile.
- Students without an attendance status will show as a shade of the teacher's colour they are scheduled with for that session.
- Once a session is set with a status, it will change to one of the following colours:
    - Blue - Attended
    - Red - No Show
    - Brown - Make-Up (i.e. make-up session owed)
- For Make-Up sessions that have been scheduled from a Make-Up owed session, they will display as a shade of the teacher's colour they are scheduled with for that session, with vertical lines to delineate a regularly scheduled session vs. a make-up scheduled session.
- Administrative Tasks (scheduled via 'Add Assessments'), staff's profile colour with diagonal lines

Schedule Students

IQ's scheduling tool is used to keep track of all students, as well as the times they regularly attend the location. Once enrollment documents have been completed, the student will be enrolled in a program and have a schedule created.

Scheduling is completed on an ongoing basis within IQ. It provides a template to use throughout a student's entire program to track changes and additions, which makes it easier to uphold and monitor table tightness and teacher cost.

Tables are kept as tight as possible while accommodating for student-to-teacher ratios, student personalities, age differences, academic materials, etc. It's also vital that they're paired with the teacher that they will work best with.

The maximum student-to-teacher ratio for ***GAP programs is 3:1***; whereas, the maximum student-to-teacher ratio for ***Pre-Reading Readiness, Reading Readiness, French, and high school programs is 2:1***.

Rather than trying to group all students of the same age and/or ability level together, you will find greater success in diversifying your tables. For example, you will generally not find a table to be very productive if there are three grade twos placed on the same table. Additionally, it is recommended to not schedule more than one "high-needs" student at a table (e.g., ADD, ADHD, or learning exceptionality).

Ensure all students' scheduling is accurately inputted into IQ in order to ensure that no student has been missed on the schedule. Once scheduling has been completed, review the daily, weekly, and monthly teacher cost report generated by IQ to ensure that ***25% benchmark teacher cost*** is being achieved. There may be days when tables can be consolidated due to cancellations. Determine this by noon, so a teacher can be notified of a cancelled shift.

If a student is unable to attend one of their scheduled classes and provides the appropriate notice as per the *Enrollment Form*, you will mark them as "Make-Up" - indicating that a make-up session is owed. A list of all owed make-ups is provided in IQ so you are able to easily schedule these owed classes. When scheduling a make-up, the student should be scheduled where there is already a spot available to optimize your table tightness. Another option is to schedule students for an hour prior to or immediately following the hour of their regularly scheduled class.

Schedule Teachers & Payroll

In addition to scheduling students' lessons, you will also schedule teachers' shifts for IQ to provide payroll reporting and a detailed teacher cost analysis.

IQ provides a schedule report for the hours each teacher worked. Ensure you review each teacher's schedule entered at the end of every day for accuracy to prepare for the upcoming payrun - a summary of which can be found in Teachers > Teacher Scheduler (select payroll date range).

Complete Billing

Only two forms of payment options should be presented when enrolling clients: pre-authorized debit or pre-authorized credit card. Every client should be on some form of pre-authorized payment option to avoid having to chase them for payment. All clients should be set up for pre-authorized payment to be withdrawn on the first of the month for the upcoming month of classes unless a different date is agreed upon during enrollment. (For example, processing payment on the 5th or 10th).

By the second of the month, you will contact any parents whose payment was declined or NSF and verify merchant report deposit amounts match bank deposits.

Monthly Billing Report & Mass Payments Action

You want to ensure you are always processing payments for the classes scheduled in the upcoming month at the beginning of each month. This sets expectations for parents and also coincides with the policies they sign in the Enrollment Form. If you bill at other times, you may find parents asking to only pay for the classes attended, which not only impacts your bottom line, but also severely impacts the student's progress. You will always be billing for a minimum of eight hours per month since students attend a minimum of two one-hour sessions for each subject they are needing support with.

While initially this may seem daunting to calculate every month for each student, there is a fantastic feature in IQ - The Monthly Billing Report - that will do all of the calculating for you based on each student's recurring schedule and program rate.

Within IQ's Monthly Billing Report you will also find a 'Mass Payments' action, which allows you to transfer the payment amounts collected via your payment processor into IQ to maximize the functionalities available to you in IQ - invoices, accounts receivable, etc.

View Reports

IQ provides the reports necessary when analyzing your business and creates the Monthly Franchise Report.

Your ***Monthly Franchise Report (MFR) is due by the 5th of every month*** for the previous month. In order to submit your MFR, you must have all students scheduled and their attendance marked for the previous month.

To generate your MFR, select the last day of the month for which you are generating the MFR, ensure all local marketing expenses for the month are accounted for, and all assignments, as well as the classes are submitted and approved. Without this your MFR cannot be submitted.

It's a best practice to ensure that you are always looking at your assignment pending approval in IQ and ensuring that all sessions have been approved on a daily basis. IQ will use all of the data entered for student sessions, etc. to summarize the month.

Use the Toolbox

IQ's Toolbox contains a variety of helpful resources. It is where you can access the Help Desk, Marketing Requests, and Internal Server Documents.

G-Suite

Google Calendar

Having an up-to-date Google Calendar to record appointments, school contacts, assessments, conferences, tours and consultations, staff interviews, staff training, etc. will be crucial for the efficient operation of your location. Google Calendar is a daily tool to help ensure you are managing and optimizing your time effectively. It is recommended to have your Google Calendar synced to your cell phone so any notifications of events don't get missed.

Inbox Zero

Inbox Zero is a method of email management focused on reducing the time your brain spends thinking about your inbox, not necessarily achieving a zero-email count. It encourages quickly processing each email upon arrival by deleting, delegating, deferring, or responding to it immediately, thereby minimizing distractions and improving focus.

To facilitate this methodology with your management team, we recommend utilizing the flags, filters, etc. functionalities of G Suite.

Google Reviews

Reviews on Google provide valuable information about your business to both you and your customers. Business reviews appear next to your listing in Maps and Search and can help your business stand out on Google. You can request reviews from customers through a short URL that's specific to your business.

To get reviews on Google, encourage your customers to spread the word about your business by following these best practices:

- Remind your customers to leave reviews. Let them know that it's quick and easy to leave business reviews on mobile devices or desktop computers.
- Reply to reviews to build your customers' trust. Your customers will notice that your business values their input and possibly leave more reviews in the future.

Reviews are only valuable when they are ***authentic, honest,*** and ***unbiased.*** As a result, you shouldn't offer incentives to customers in exchange for reviews - and, in fact, if Google discovers this, they will remove the review(s) and even deactivate your Google Business Profile. Although you may strive for a perfect 5.0 rating on Google, it has been proven that potential clients will often trust a 4.7 rating more than a 5.0 rating as it seems more genuine and realistic - no one is perfect after all. What is most important in the realm of Google Reviews is that you are obtaining new reviews consistently. It is obvious that you were doing a "campaign" if potential clients see lots of reviews in February and September, but none the rest of the year - consistency is key!

In-Centre Décor

From Parent Guides, Scholars Apples, and Certificates of Achievement to inspirational posters, brag boards, and lobby TV slideshows, our in-centre branding and marketing is an important component of growing your business and aligned with our brand style of being ***clean, modern, and inviting***.

Throughout all areas of your location, it's important to adhere to the brand standards for all furniture and décor. As shared previously, clear and consistent cohesion across the system reinforces ***credibility***, ***professionalism***, and ***trust***. While it may seem like a small detail, it's components like our consistent and cohesive décor package with matching furniture that help to serve the premium brand perception compared to other companies, whose mismatched furniture can look like they were purchased randomly at garage sales to fill the space or whose cluttered spaces make it difficult for students to focus on *their* personalized programming due to too much visual stimulus. Ultimately, every detail has been carefully curated to align our brand and program differentiators so we are not just "talking the talk", but also "walking the walk". Please reach out to the Operations Team if you are interested in new furniture or to discuss additional décor items before they are purchased or installed.

In addition to having a well-branded location, Scholars encourages locations to run lobby campaigns a minimum of six times per year. Lobby campaigns help to retain clients and provide great content for your social media pages. You can find many great - and easy to action - ideas in IQ's Internal Server Documents > Marketing/Operations - Lobby & Community Event Activities.

Location Appearance Checklist

Follow this checklist to ensure that your location portrays a professional appearance at all times.

Lobby

- ▢ Floors, doors, and windows are clean
- ▢ End table is dusted with well-organized Parent Guides and other reading materials in a tiered acrylic magazine holder
- ▢ Colouring basket is neat and well stocked with colouring books and crayons on the end table shelf
- ▢ Only Scholars branded signs - no handwritten signs.
- ▢ Furniture is clean and in good condition
- ▢ Lobby campaigns are neatly organized and maintain clear sight lines into the teaching space and office

Director's Office

- ▢ Floors, doors, and windows are clean
- ▢ Furniture is clean and in good condition
- ▢ Minimal materials on desk and lateral filing cabinet
- ▢ Professional/academic certificates are framed and displayed

Teaching Space

- ▢ Floors, doors, and windows are clean
- ▢ Approved furniture only
- ▢ Furniture is clean and in good condition
- ▢ Scholars Store is well-stocked, includes price tags on all items, and is nicely displayed

- ▢ Manipulatives are organized and easily accessible
- ▢ Teacher Resources are in good condition

Assessment Room

- ▢ Floors, doors, and windows are clean
- ▢ Furniture is clean and in good condition

Bathroom (and Kitchenette, if applicable)

- ▢ Clean and organized
- ▢ Regularly stocked with supplies

Quick Reference Guide: Handling Objections

Objection	Sample Responses
Cost *"That's really expensive."*	• *"Our prices are reflective of the personalization of our programs and student success across our network."* • *"We want to prove to you why our program is the best and share the value we can offer to you and your child. That being said, can you tell me a little more about your child and why you think the solution is too expensive?"*
Affordability *"That's out of my budget."*	• *"I understand that Scholars is currently out of your budget. We would love to help your child when the time is right. Let's connect again in a couple of months to see if anything has changed."* • *"Is there anyone else in the family who can help pay for this tutoring? We know students who get help from grandparents, etc."*
Key Decision-Maker *"I need to speak with my partner."*	• *"I understand completely. I will send a follow-up email outlining all of the information that we just discussed for you to share. I will also share some available days and times in the upcoming days for us to hop on a call or schedule an on-site visit for you all to come in for a meeting so we can discuss with your family."* • *"I'll send you a follow-up email with everything we just discussed. Then, I'll give you and your partner a call tomorrow after you've had a chance to go over the details together."*
Rushing *"I don't have that much time right now. Just send me the information."*	• *"I hear you - it's a crazy time of year! In order to provide you with some specific information for your child's personalized programming, can I ask you just three questions?"* • *"We know all about busy schedules! Our team at Scholars is well-versed in managing students who require schedule flexibility. How about I call you back at xx or yy?"*
Scheduling *"We don't have time to come two hours per week!"*	• *"I'm hearing that your child goes to hockey practice three times a week. That's a big commitment! But just like in hockey, practice is essential for building confidence, competency, and passion for reading. Could you squeeze in an hour right after school twice a week?"* • *"We absolutely understand how busy schedules can be. That's why our program is designed to make the biggest impact in the least amount of time possible: two hours per week ensures retention while building healthy learning habits and routines."*

Scholars

Quick Reference Guide: Handling Objections

Objection	Sample Responses
Ratios and Home-Tutoring *"We want a 1:1 tutor."* *"We want a tutor who will come to our house."*	• *"Our locations are designed to mimic a classroom on a smaller scale, which makes it easier for our students to transfer their understanding to their school classroom with confidence!"* • *"Our students thrive in this 3:1 ratio and show the same – if not better – results than 1:1 tutoring. In a 3:1 setting, students receive personalized attention, but they also have the opportunity to develop their own skills, strategies, and habit toolbox, without immediately relying on their tutor for help. Plus, they get to develop essential social skills too!"*
Homework *"Do you give homework? We want more practice."*	• *"Our philosophy is to take the burden off the parent, so most of our students do not take additional work home! The program is designed to be successful without it. Having said that, I'm happy to share some great books for you and your child to read together at home."*
School Supports *"My child has an EA and their IEP was just updated."*	• *"I'm so happy that your child has an EA! However, an EA is an accessibility aid intended to make classroom material more accessible; it's not going to provide personalized lessons or fill the knowledge gaps from previous grade levels. That's where we come in!"*
Child's Personality *"My child hates school."*	• *"Students who struggle in school often thrive at Scholars due to the small ratios, our Enrich, Enhance, Extend approach, and our personalized programs, which ensure that each child's lessons are exactly aligned with their existing knowledge. They won't feel overwhelmed by challenging concepts like they might be at school!"*
Competitors *"I'm going to call around to other tutoring companies before I make any commitments."*	• *"Great idea! We absolutely encourage you to do your research prior to enrolling. Based on what I've heard about your child, I have some questions you should be asking when you call around:* ○ *What are their student-to-teacher ratios? / Do they start with an assessment to personalize their lessons? Do they offer reassessments after 36 hours in the program? / Do they provide progress updates to you every 12 hours, if at all? / Do they offer a Team Approach to learning? / What are their teachers' education levels? / Do they use "off-paper" tools and resources to engage different learning styles? Or do they just use worksheets?* *I will include these questions in my follow-up email!"*

Schölars

Quick Reference Guide: Assessment Flowcharts

Based on the information you collected during the inquiry, use these flow charts to help you determine the correct assessment(s) to administer. Remember that students should follow the following program sequence for the greatest long-term success and retention:

Reading ➡ Writing ➡ Math ➡ Enrichment

Reading

If reading below the grade 1 level...	Assessment Record	Program
1. Phonics Assessment ➔ 2. Reading Readiness Assessment	Reading Readiness Assessment Record	Pre-Reading Readiness or Reading Readiness

If reading at grade 1-3 level...				Assessment Record	Program
1. Phonics Assessment	➔	*if stopped at Phonics Assessment Subtest 10 or below*	➔ 2. Reading Readiness Assessment	Reading Readiness Assessment Record	Reading Readiness
	↳	*if stopped at Phonics Assessment Subtest 11-13*	➔ 2. CAT-3 Reading Assessment (refer to *CAT-3: Level Assignments, Test Subjects, and Test Times - 2020* for additional information)	CAT-3 Reading Assessment Record (with Phonics section)	GAP-Reading (with phonics)

If reading at grade 4 level and above...	Assessment Record	Program
1. CAT-3 Reading (refer to *CAT-3: Level Assignments, Test Subjects, and Test Times - 2020* for additional information)	CAT-3 Reading Assessment Record	GAP-Reading

Writing

➥ If in grades 1-3 (reading at grade level)...	Assessment Record	Program
1. 1-3 Writing Assessment	1-3 Writing Assessment Record	GAP-Writing

➥ If in grades 4-8 (reading at grade level)...	Assessment Record	Program
2. CAT-3 Writing (refer to *CAT-3: Level Assignments, Test Subjects, and Test Times - 2020* for additional information)	CAT-3 Writing Assessment Record	GAP-Writing

Math

➥ If in grades 1-8 (reading at grade level)...	Assessment Record	Program
1. CAT-3 Math Assessment (refer to *CAT-3: Level Assignments, Test Subjects, and Test Times - 2020* for additional information)	CAT-3 Math Assessment Record	GAP Math (with Timed Math Drills if required)

High School

While high school students usually complete a trial hour and work on their course curriculum concepts, in some cases, it may be beneficial to assess a student using the CAT-3 Assessment material. Refer to *CAT-3: Level Assignments, Test Subjects, and Test Times - 2020* for additional information.

Quick Reference Guide: Mastery Learning

Mastery learning is an instructional approach where educational progress is based on performance rather than time spent. Learners are given multiple opportunities and are assessed repeatedly until they reach the required mastery level. This final level of achievement remains the same for all, but the time to master it can vary.

At Scholars, students achieve mastery of a concept when they are able to achieve **100% on the first two activities** or **four activities at or above 80%**. They then progress to the next concept within that skill. It's important to note that mastery does not imply that they will always remember that concept or never need to review again; it simply means that, at that time, the student had successfully demonstrated proficiency with the concept.

Achievement Codes for Conferences:

Rating	Internal Explanation	Example	External Explanation
Advanced	In the **first <u>two</u>** activities of the concept, the student was able to achieve **two consecutive scores of 100%**.	100%, 100%	The student demonstrated proficiency with the concept ***quickly and <u>with ease</u>***.
Accomplished	In the **first <u>four</u>** activities of the concept, the student was able to achieve **four consecutive scores at or above 80%.**	80%, 80%, 90%, 80%	The student demonstrated proficiency with the concept after ***<u>minimal</u> reinforcement and review***.
Expanding	In the **first <u>six</u>** activities of the concept, the student was able to achieve **four scores at or above 80%.**	60%, 70%, 80%, 90%, 90%, 80%	The student required ***<u>some</u> practice and reinforcement*** of the concept to achieve proficiency.
Developing	In the first **<u>eight</u>** activities of the concept, the student was able to achieve **four scores at or above 80%.**	60%, 60%, 70%, 70%, 80%, 90%, 90%, 80%	The student required ***<u>considerable</u> practice and reinforcement*** of the concept to achieve proficiency.
Emerging	After more than **<u>eight</u>** activities of the concept, the student was able to achieve **four scores at or above 80%.**	40%, 50%, 50%, 60%, 70%, 70%, 80%, 80%, 80%, 80%	The student required ***<u>significant</u> practice and reinforcement*** of the concept to achieve proficiency.

Exception: Timed Math Drills (TMD) require 100% mastery. Therefore, a rating of advanced would apply if 100% was achieved within the first two attempts; an accomplished rating would apply if 100% was achieved within the first four attempts; etc.