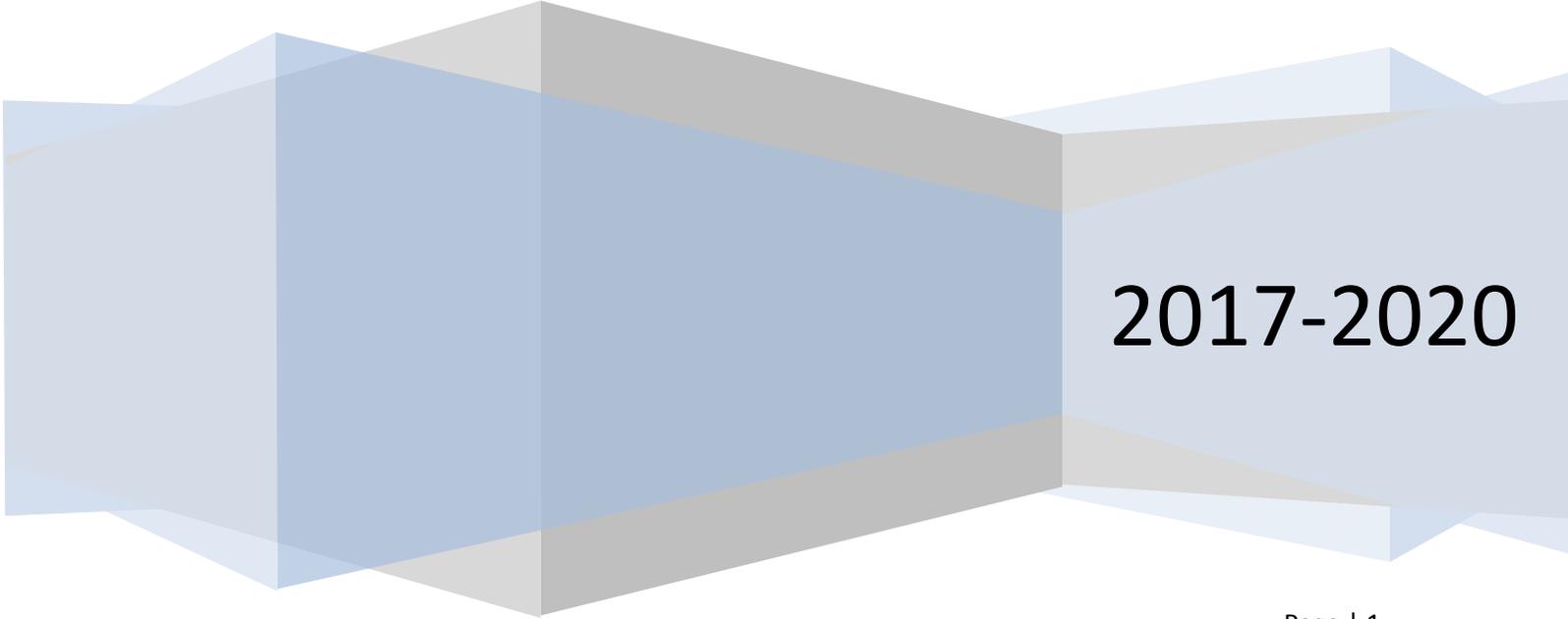


Sample Catholic School

Sample Catholic School

Multiyear Strategic Plan



2017-2020

Version 1.2

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Purpose and Vision

This document is intended to outline the strategic plans for our School over the course of the next three years. The key goals set two years ago at the time of the writing of the prior Strategic Plan included normalizing the parish subsidy, increasing sources of revenue, maintaining the high levels of academic achievement, and upgrading the physical plant. This document will refine the prior goals and detail the targets for the next three years.

Since 2005 the financial condition of the School has stabilized, despite the unforeseen and significant economic downturn and recession from 2007-2009 and its lingering effects extending into 2017. It will be critical to further strengthen the financial position and successfully market the School in the next several years. Key goals and initiatives for the coming three years are as follows:

- Maintain or increase enrollment through recruitment and marketing in a competitive marketplace. Highlight the differentiating factors that give the School its competitive edge, including its focus on Catholic values, its strategic location, its innovation, and its track record of providing students with a solid foundation as they mature into virtuous, global citizens who become future church and community leaders.
- Grow the annual funding campaign as a strategic source of revenue, including strengthening the ties to alumni, the local community, and other key stakeholders.
- Advance further integration of technology into the curricula and broaden the academic-related programs. Expand digital forms of learning and the addition of clubs that enhance the academic experience.
- Drive the transformation of fund-raising to support not only capital projects but also to generate ongoing operating revenue to reduce or eliminate the parish subsidy of the School.

Status of 2015-2018 Objectives

The main objectives from the most recent Strategic Report, updated in 2015, were as follows:

- Maintain or increase enrollment through recruitment and marketing in a competitive marketplace.
- Grow the annual funding campaign as a strategic source of revenue, including strengthening the ties to alumni, the local community, and other key stakeholders.
- Advance further integration of technology into the curricula and broaden the academic-related programs.
- Drive the transformation of fund-raising to support not only capital projects but also to generate ongoing operating revenue to reduce or eliminate the parish subsidy of the School.

Each of these goals has seen significant levels of achievement, with continued focus on other objectives and further goals being established in this document. In the 2016-2017 school year, enrollment was 350, exceeding the goal of 340 students. Our School has been blessed with rigorous academic and extracurricular foundations to support strong operational vitality.

An annual funding campaign has been established, leveraging the investments of the past several years in gathering and engaging the greater school constituency, including not only parents but also other stakeholders such as alumni, grandparents, and the local community. Annual funding has consistently raised tens of thousands of dollars for the School since its inception.

Significant investment in the academic environment is reflected in the acquisition of interactive whiteboards for all classrooms and many communal areas, the addition of Chrome Books in Grades 6 through Grade 8, the broadening of the integration of iPads into the elementary classrooms, the expansion in the use of Google Classroom, the introduction of IXL into the mathematics curriculum, and the refresh of the technology in the Computer Lab. A new portable computer lab, featuring state-of-the-art two-in-one tablets, has been acquired and integrated into the learning curriculum across grades.

Generating additional sources of revenue to support ongoing operations is continuing. In the 2016-2017 school year, \$XX,000 was raised via the school auction and \$X,000 was raised in support of the classroom initiative. The parish subsidy is presently stable, though work continues to reduce the dependency on that revenue stream. The 2017-2018 budgeted parish subsidy is \$XX,000, nearly half of the \$XXX,000 subsidy budgeted in the 2016-2017 school year.

The School has maintained the high level of academic achievement over the past three years. The School continues its partnership with the neighboring program, focused on the needs of students with exceptionally high academic abilities. More than 80 students annually qualify for this program, and are prepared to take standardized tests such as the SCAT, SAT, and ACT. Moreover, Grade Seven, the highest grade level being tested, consistently scores in the highest percentiles on the Iowa Assessments.

There has also been some investment in the physical school plant. New, modern desks have been installed throughout the entire School and plans to replace all exterior windows have been put into place.

Mission Formation and Evangelization

The School, a nationally recognized Catholic school rooted in Gospel values of love and respect, offers a rigorous, standards-driven curriculum incorporating 21st century learning with a traditional approach to the education of each child.

Focused on excellence and innovation in teaching and learning, students are encouraged to use critical thinking skills and confidently express themselves in a safe and nurturing environment.

The vision of the School is to provide students with a solid foundation as they mature into virtuous, global citizens who will become future church and community leaders.



Background

Our School is one of the largest Catholic schools in the Archdiocese. It was founded on parish property in 1970, and has an enrollment of approximately 350 students from Pre-K through Grade 8. The School draws its students from across various counties, with approximately 38% coming from the nearby city, and the remainder from 19 surrounding cities and towns in the state.

Leadership and Governance

Our School operates under the auspices of the Office of Education of the Archdiocese. The School is led by our Principal, the elementary school assistant principal, and a part time teacher and middle school assistant principal. Our Principal receives direction from the Church pastor and from the Office of Education under the leadership of the Superintendent.

Our Principal and pastor collaboratively work with the School Board, which participates in the decision-making process to develop and oversee the School's fidelity to its mission, its standards of excellence, and its operational vitality. The School board looks to attract members from across the school community, including current parents, alumni, alumni parents, and unaffiliated local businesspeople. This varied membership profile is in keeping with the direction set forth by the Archdiocese Office of Education.

Excellence in Teaching and Learning

Our School follows the guidelines set forth by the Archdiocesan Office of Education. All academic subjects such as mathematics, reading, language arts, science, and social studies are taught by highly qualified and enthusiastic teachers and are aligned to standards-based curricula.

Elements consistent through all grade levels are as follows:

- The science laboratory is utilized by all classes; experiments performed in the lab reinforce the lessons taught.
- Technology is integrated throughout the curriculum with students in grades 1 through 8 utilizing a fully equipped computer lab with internet connection. In addition, all grades have access to interactive white boards, projectors and laptops for in-class use. White boards are installed in all homerooms and most common areas for general use. The students learn to use the internet for research, and utilize state-of-the-art software to write papers, to give presentations, and to engage in mathematical analyses in specific academic content areas. Eighth Grade students leverage school-provided Chrome Books integrated into their curriculum to provide a more vibrant, diversified, and technology-embedded educational experience.
- The study of religion takes place every day. Current religion books are used in all grades with supplemental instructional materials used for the sacrament classes. Students take an active part in preparing and celebrating monthly school liturgies.
- Spanish is taught weekly beginning in Pre-K and continuing through eighth grade. Upon graduation, most eighth graders are eligible for Spanish II in high school.
- Students participate in physical education, music, and art with teachers who specialize in these areas and utilize facilities customized and dedicated to these pursuits.
- Throughout the year educational, cultural, and health and safety enrichment programs are provided.
- Students also participate in a drug and alcohol prevention program offered by the local Police Department.
- Health Science is taught to all grades and examines age appropriate topics such as nutrition and adolescent development.

The School diligently works toward effectively meeting the needs of students with remedial needs. However, it does support gifted students. More than 80 students are eligible for John Hopkins programs each year based upon high achievement scores on the Iowa Test of Basic Skills.

A Reading Buddies program matches upper grade students to assist lower grade students who are learning to read. A yearly celebration of Dr. Seuss's birthday brings the entire school together to spend the afternoon reading and listening to outside speakers discuss the importance

of literacy and reading as a life skill. Moreover, each grade participates in educational field trips, including visits to Boston and New York to participate in cultural experiences as well as trips to local museums and nature preserves to immerse students in history and science.

Religious formation is central to the Catholic identity of the School, and students actively participate in the sacramental life of the Church. At the beginning and end of every school day all students are led in prayer by Grade Eight students or school administrators. The Rosary is recited each month. These prayers are chosen to reflect the readings of the day and the liturgical season. The entire school participates in the Stations of the Cross during Lent. Students attend Mass on Holy Days, as well as once each month during the school year and to mark the start and end of each school year. Classes rotate the responsibility of supporting Masses in song and word. Second grade students study for and receive the Sacrament of Reconciliation. Third grade students receive the Sacrament of Holy Eucharist. First grade students participate in the May Crowning ceremony during the month of May. All Catholic students from Grade Two through Grade Eight receive the Sacrament of Reconciliation at least once per school year.

An external measure of the success of the educational foundation that students at our School receive can be derived from the amount of annual scholarships offered to graduating students by the areas Catholic and private high schools to which they apply. Since 2011, the total annual scholarships offered have grown from \$100,000 in 2011 to nearly \$250,000 in 2016 and more than \$150,000 in 2017. Figure 1 depicts the monetary awards offered to the outgoing Grade Eight students for the past seven years.

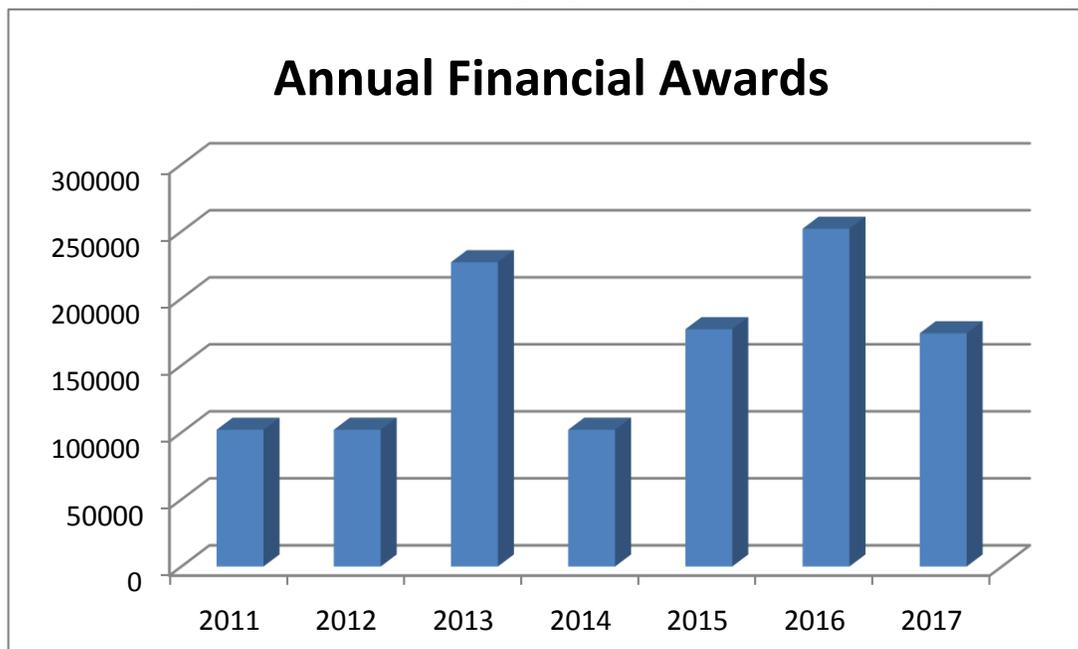


Figure 1. Annual monetary awards offered to Grade Eight students, based upon entrance exam results in Catholic and private high schools.

Extracurricular Activities

Extracurricular achievements are also promoted and supported to provide students the opportunities to further identify and develop their gifts and talents outside the classroom, and to enhance their creative aesthetic, social/emotional, physical, and spiritual capabilities. Those activities offered include the following:

- Our School fields both girls and boys varsity and junior varsity basketball teams as well as coed junior varsity and varsity soccer teams. All teams play against other area parochial schools. Both the Boys and Girls basketball programs enjoy great success, competing annually for the highest honors in their sport.
All three school soccer teams finish first or second in their divisions in various years.
- Students in grades 6-8 produce an annual school play which is usually presented in the spring.
- The School has a student council made up of middle school students interested in promoting school spirit and social action throughout the School community. The Student Council has raised thousands of dollars to support agencies and organizations that service the needs of the most vulnerable in our society, including a local Men's Homeless Shelter, The Village for Children & Families, the Copprome Honduran Children's Orphanage, Relay for Life, in preparing sandwiches for the hungry, and in building a library for an orphanage in Mozambique.
- After-school clubs include the Homework Club, Art Club, Math Facts Club, Yoga Club, Chess Club, Book Club, Running Club, Soccer Club, and Knitting Club.
- Outside musicians provides music lessons and band direction. Lessons are taught during school, and band practice is either before or after-school. Cadet and Advanced levels of band are available for young musicians that perform at least twice yearly for students, family, and the community. Moreover, a Jazz Band offers the gifted to participate in additional performances. Each year, the School's students are selected for regional and all-state band, and perform at special venues such as New Britain Rock Cats baseball games, the State House, and the plaza outside Lincoln Center in New York. The School band also plays at open houses, at our annual Grandparents/Special Persons day.

Personnel

The School is blessed with qualified and dedicated faculty, aides, office staff, and custodial engineers to foster high levels of student achievement and development. A nurse is resident full time at the School to address health issues. In the past four years, the School has added a Director of Development, a Business Manager, and an Athletic Director to enhance the overall student experience at the School and to strongly position the School for sustained growth. The faculty at the School regularly participates in professional learning communities to develop, implement, and continuously improve the effectiveness of the curriculum. The Board recognizes that attracting and retaining top talent as well as providing a quality and comprehensive educational experience for students is a challenging yet critical component to the strategic plan.

Enrollment

Enrollment at the School is projected to be 356 students for the 2017-18 academic year, of which 115 are expected to be enrolled in the Middle School. The School has managed to keep enrollment strong. Moreover, as the number of Catholic schools has declined by more than 20% in New England since 2000, this School has increased the number of faculty and support staff to ensure the highest levels of quality. It is expected that the number of school children aged six to eleven will decrease by approximately 1.2% through the year 2020. In light of those headwinds, and with the increased popularity of magnet schools, maintaining strong enrollment numbers are critical to the success of the School.

(<http://www.childstats.gov/americaschildren/tables/pop1.asp?popup=true>). A graphical representation of enrollment for the past 12 years and a projection for the next three is as follows:

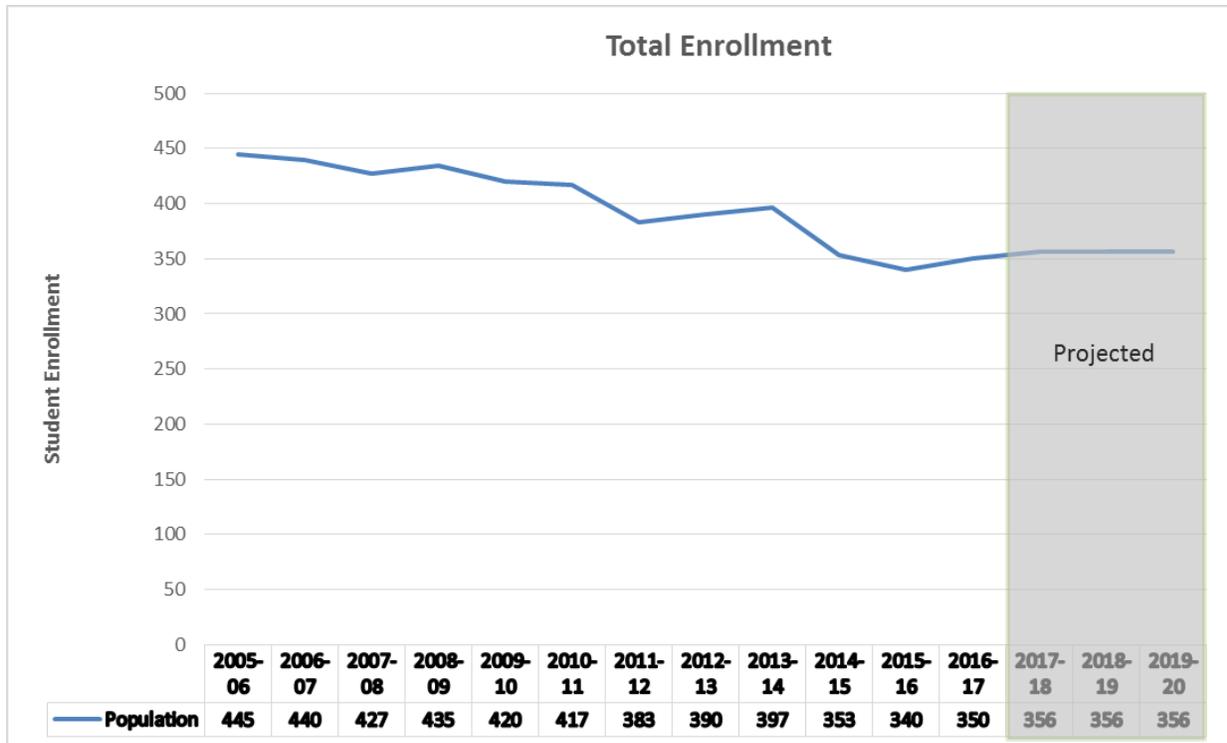


Figure 2. Student enrollment 2005-2020.

Approximately 38% of enrolled students are residents of the city. The remaining 62% commute from 19 other towns and communities across four counties in the state.

The School Board recognizes the need and opportunity to increase enrollment through improvements in recruitment and retention. There are opportunities to recruit in the surrounding area to reinforce the overall school enrollment numbers. Initiatives to address this goal are identified later in this plan.

Operational Vitality

The School is in sound financial shape given the current economic environment. The School has successfully decreased its parish subsidy by 55% in the past twelve years, from \$XXX,000 in 2004-05 to \$XXX,000 in 2016-17, while maintaining a quality Catholic education for its students. As of 2017, tuition and fees paid directly by parents represent 80% of the total school revenue, down from 95% in 2005. This allows the School greater flexibility in its budgeting and allowed for greater investment in instructional capabilities. Fostering alternative sources of revenue is important to maintaining and growing the sound fiscal foundation of the School. Tuition and fees currently average approximately \$X,000, which places the School in the higher range of schools when compared to other nearby Catholic schools with regard to educational costs.

Expenses are expected to increase in the next several years by as much as 5% annually that will warrant added revenue generation. The breakdown of current school expenses by category as a percentage of the overall expense is as follows:

Payroll (Salary, Taxes, Benefits)	77.0%
Instructional Costs (Textbooks, Software, Training)	6.0%
Operational Expenses (Utilities, Supplies, Maintenance)	10.0%
Student Services	0.5%
Advancement Expenses	5.0%

Figure 4. Percentage of Total Expenses by Budget Category (2017).

Facilities

The School facilities are generally in sound structural shape. The School consists of two buildings: a small facility and the main building housing Grades Pre-K through Eight as well as a gym/cafeteria and dedicated science, art, music, and computer labs. The main school building was built in two phases: the first containing many of the current classrooms and the second that added two 5th grade classrooms, a science lab, a music room, an art room, and a religious education classroom. The gymnasium has been completely renovated, including a floor replacement, updated lighting, window glazing, repainting, and structural enhancements to maintain the facility in the face of regional weather patterns. Enhancements have been made to the physical security of the buildings, including updated audio and video surveillance systems and installing privacy glass film on key school windows and glass doors. The School stage and library have been improved. All classrooms have been renovated in the main building with new floors, ceiling, lighting, and electronics. The bathrooms and hallways on the second floor have also been upgraded. Conversion of the heating system to a modern, efficient natural gas system has been completed. More capital investments in infrastructure are planned, as outlined later in this document. Focus will also need to be placed on regular maintenance of the facilities, paramount of which are the new exterior windows targeted for a Year 2 investment in the Strategic Plan.

Advancement

A comprehensive advancement plan addresses four core areas of alumni relations, communications, recruitment and retention, and fundraising. The objectives of this plan are three-fold:

1. The advancement plan should support the core mission of the School by garnering philanthropic support from alumni, parents, grandparents, and friends in support of institutional priorities as identified by the strategic plan. In doing so, long-term relationships and habits of giving will be inculcated among alumni, parents, past- parents, and grandparents.
2. The plan should highlight the public relations strategy to promote the School in local area markets.
3. The plan should outline recruitment initiatives and support retention efforts by enhancing communication within the school community.

The school community is highly engaged, and events throughout the school year provide opportunities for the school community to gather and promote productive community relations. The annual Grandparents and Special Persons Day was conducted during the 2016-2017 School Year to great success, with more than 300 attendees. This event has grown in participation each year since its inception. Feedback has been extremely positive and this has further expanded the donor database. Community events such as the annual Basketball Tournament, Golf Tournament, Walk-a-Thon, school Drama Club musical, and School Auction all serve to bring together the various school constituents in a supportive and productive manner.

The combined efforts of the capital campaign, annual funding, and the special Campaign have raised over \$X in direct and in-kind contributions, which have supported classroom renovations, technology integration, improvements to infrastructure, and complete renovation of the gym. A part time Director of Development was hired in 2011. Plans addressing the four core areas include the following:

Alumni Relations

- Continue updating alumni database and search for missing alumni
- Generate Alumni Newsletter twice yearly
- Plan general Alumni Event/Reunion
- Host Alumni Career Day
- Establish Alumnus of the Year/Distinguished Alumnus Award
- Initiate Alumni sports event (alumni basketball team vs varsity team)

Communications

- Create a new school brochure for prospective families
- Continually update the website on a weekly basis
- Develop a monthly e-newsletter highlighting school and student achievements
- Establish a calendar of events for media coverage – print, radio, television
- Review advertising methods and budget
- Generate an Annual Report to Donors
- Produce promotional DVD for prospective families, TV and digital media
- Recognize achievements in local parishes and local media of resident students

Recruitment and Retention

- Establish Enrollment Committee comprised of faculty, parents and School Board
- Market to towns in areas that are underrepresented relative to commuter routes
- Target advertising to towns with ambivalence to local community schools
- Expand parent ambassador program to new families in Pre-K and K
- Institute Shadow Day for Pre-K students into Kindergarten
- Develop Open House for CCD parents and students
- Cultivate young alumni into Ambassadors for the School (speak at Masses)
- Partner with area parishes for Open House days
- Establish exit interview for all families leaving the School
- Conduct workshop for faculty and staff on their role in recruitment and retention

Fundraising

- Conduct annual funding utilizing two solicitation mailings annually
- Establish annual phone-a-thon
- Continue Grandparent's Day
- Cultivate foundation relationships
- Host campaign update event
- Introduce leadership giving program
- Develop small group "Principal's Breakfast" with major supporters
- Assist in school community fundraising events

A year-by-year plan for Recruitment and Retention is provided later in this document.

Strategic Initiatives

The following outlines the key strategic initiatives essential to the improvement and continued strength of the School. Developing specific action plans, assigning responsibility, determining specific timeframes, establishing metrics, and implementation of plans for each of these initiatives are the responsibility of the School Board. The initiatives are partitioned into the following categories:

- Physical Plant, Facilities, & Equipment
- Curricular and Co-Curricular Materials and Activities
- Staffing
- Enrollment

Physical Plant, Facilities, & Equipment

The objective is to maintain compliance with fire, health, and safety codes.

Year 1

- New desks for all classrooms – Estimated cost \$XX,000

Year 2

- Replace roof – Estimated cost \$XX,000
- Replace exterior windows – Estimated cost \$XX,000

Year 3

- Annex and Pre-K physical plant upgrade, windows, plumbing, kitchen, roof – Estimated cost \$XX,000

Curricular and Co-Curricular Materials and Activities

The objective is to maintain levels of academic achievement, improve the educational experience, and establish a competitive advantage to attract and retain students.

Year 1

- Replace Science books in grades K – 5
Estimated cost \$X,000
- Replace Mathematic books grades K - 5
Estimated cost \$X,000
- Expand on-line content for learning
- Expand reading program Pre-K3
Estimated cost TBD
- Upgrade interactive whiteboards Pre-K-8
Estimated cost TBD

Year 2

- Replace English books in grades 3 – 8
Estimate cost \$XX,000
- Explore tablet expansion of “Bring Your Own Device” to grade 7
- Replace Mathematics books grades 7 – 8
Estimate cost \$XX,000

Year 3

- Explore tablet expansion of “Bring your Own Device” to all grades
- Expand Foreign Language Program, grades 7 – 8 Estimated cost TBD
- Replace Science books in grades 6 – 8
Estimated cost TBD
- Replace Health books in grades 5 – 7
Estimated cost TBD
- Replace Literature books for grades 6 -8
Estimate cost \$XX,000
- Address recommendations following NEASC

Staffing

The objective is to strengthen educational program, attract and retain students through added services and a quality Catholic education, and drive increased revenue through new channels.

Year 1

- Hire second Pre-Kindergarten 3-year old program teacher and aide –Estimate cost TBD
- Expand Resource Language Arts/Math to grades K - 5
Estimate cost TBD

Year 2

- Add extracurricular activities, potentially including Science Club, Technology Club, and Lego Club ○ Estimated cost \$X,000

Year 3

- Strengthen existing clubs, sports activities, and CTY support ○ Estimated cost \$X,000

Enrollment

The objective is to achieve the following planned enrollment projections through improvement in student retention and recruitment:

	Current Year	Projections		
School Year	2016-2017	2017-2018	2018-2019	2019-2020
Parishioners	119	119	119	119
Catholic Non-Parishioners	199	203	203	203
Non-Catholics	32			
Boys	14	20	20	20
Girls	18	14	14	14
		34	34	34
Total (Pre-K - 8)	350	356	356	356

Figure 5. Projected Enrollment through 2020.

Year 1

- Drive greater direct engagement and marketing via digital channels, including school website and Facebook
- Establish Enrollment Committee comprised of faculty, parents and School Board
- Market to towns in areas that are underrepresented relative to commuter routes
- Target advertising to towns with ambivalence to local community schools
- Explore use of billboards as an advertising channel
- Expand Parent Ambassador Program to new families in Pre-K and K
- Market to towns in nearby area that are underrepresented relative to commuter routes
- Recognize and market achievements in local parishes for resident students
- Establish Ambassadors among parents, faculty, students, and other supporters, leveraging speaking opportunities at area parishes and in parish bulletins
- Introduce Summer Camp for grades Pre-K4 - 5
- Re-introduce 3 Year Old Pre-K program

Year 2

- Institute Shadow Day for all students
- Develop Open House for CCD parents and students
- Cultivate young alumni into Ambassadors for the School (e.g., speak at area Masses)
- Market academic achievements and matriculation patterns of student population

Year 3

- Partner with area parishes for Open House days
- Establish exit interview for all families leaving the School
- Conduct workshop for faculty and staff on their role in recruitment and retention
- Maximize exposure through coordination with major media organizations of special events and achievements at the School
- Target advertisements to towns and grade levels where potential local ambivalence towards community schools exists