



***Visioning for the Future***  
***Catholic Elementary Schools Strategic Plan***  
***Phase I***

*Diocese of Buffalo*

**November 2009**

Department of Catholic Schools  
Diocese of Buffalo

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# I. INTRODUCTION

The U.S. Bishops have stated, “We are convinced that Catholic schools continue to be ‘the most effective means available to the Church for the education of children and young people’ who are the future of the Church.”<sup>1</sup> Recognizing this, the Diocese of Buffalo began a planning process in 2009 to develop a comprehensive strategic plan for its Catholic elementary schools. The goal of this process and plan is to ensure the long-term viability and vitality of Catholic elementary school education in the Diocese.

In Phase 1 of the planning process, extensive data was collected and analyzed from many sources in the Diocese and the broader community. Mr. Jerry Verdi of Verdi Associates in Buffalo and Meitler Consultants collaborated on researching, analyzing and presenting relevant community demographics, parish and Catholic school data. A data resource book was prepared with all data, and presentations were made summarizing the information gathered and highlighting the challenges currently facing the Catholic schools of the Diocese. These challenges include demographic shifts, declining enrollments in many areas, rising costs, and diminishing financial resources. The report serves as a resource throughout the planning process and as the basis for the recommendations and goals evolving from Phase 1 of the plan and strategies to be developed during Phase 2 of the process.

Presentation and consultation meetings were held during Phase 1 with all priests and school administrators invited to participate in several gatherings throughout the Diocese. These meetings were held in each Vicariate and provided an opportunity for clarification and feedback on the data and initial recommendations/goals of the plan.

A Planning Task Force comprised of representatives from across the Diocese met regularly with the consultants to review the data and its implications, to critique the proposals drafted by the consultants and to review feedback from the broader community. Meetings with Bishop Kmiec and other diocesan leaders also provided input, feedback and overall guidance during the planning process. Phase 1 of the plan was completed in October/November 2009 thanks to the dedication and work of these committees and many other individuals who are deeply committed to the Church’s mission of Catholic education and the ministry of Catholic schools in the Diocese of Buffalo. It is hoped that the goals which follow in this plan will be used by leaders of Catholic school education at all levels to develop appropriate and effective strategies and action plans that will guide decision-making, planning and policy determination and thus ensure the vitality of Catholic school education for many years to come.

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<sup>1</sup> *Renewing our Commitment to Catholic Elementary and Secondary Schools in the Third Millennium*, 2005 United States Conference of Catholic Bishops, Inc.

## II. RESPONSES: CATHOLIC ELEMENTARY SCHOOLS STRATEGIC PLAN 2004 TO 2009

The “Catholic Elementary Schools Strategic Plan 2004-2009” was developed as part of the “Journey of Faith and Grace” diocesan plan. There were thirteen goals in six areas of school life including Catholic identity, school governance, academic program, facilities, finance and marketing. A number of the goals of this particular plan were and are still being addressed through the Department of Catholic Schools. In addition, the original strategic plan included a vision statement for Catholic school education, core values, guiding principles, criteria for a vibrant school, and objective indicators of a viable school. Each have been essential elements in thinking strategically about the elementary schools.

As part of the current planning process, “Visioning for the Future,” a review of the original goals from the previous strategic plan was conducted to determine which goals are still pertinent and could be integrated and/or expanded in the updated strategic plan.

“Visioning for the Future” builds on the original strategic plan and expanded the vision statement to reflect the anticipated future of the schools. This vision statement led to the drafting of a pastoral letter by Bishop Kmiec regarding the future of Catholic school education in the Diocese of Buffalo. The current process also expanded the Criteria for a Vibrant Elementary School and the indicators of a viable school into the “Desired Characteristics of Vibrant Catholic Elementary Schools.” Each of these documents were reviewed and critiqued by the Bishop, diocesan leaders, the Department of Catholic Schools, pastors and school principals and are part of the “Visioning for the Future” plan.

The goals developed for the 2004-2009 strategic plan are still relevant and pertinent today and should remain an ongoing focus for the schools. A number of the goals and objectives from that plan have been integrated into the Phase 1 document of “Visioning for the Future.” Phase 1 of the current strategic plan did not address the areas of Catholic identity or academics; however, aspects of each have been incorporated into the vision statement and desired characteristics.

Various elements, goals and objectives from the 2004-2009 strategic plan that are part of “Visioning for the Future” include:

- Vision statement
- Core values and guiding principles
- Criteria for a Vibrant School (areas of Catholic educators, governance, finance, marketing)
- Objective indicators of a viable school
- Governance – system of checks and balances (governing/advisory board in each school; administrator supervision/professional development; school evaluation process)
- Academics – professional staff development, continuing education; alignment with state standards
- Finance – equitable assessment of parishes for school support; 60% tuition yield for school revenue; funding toward per pupil cost
- Marketing – comprehensive marketing plan/program; brand identity for Catholic schools; resources for marketing – clergy and leadership support

### **III. RESPONSES: GOVERNANCE MODELS AND RESTRUCTURING**

Currently there are two governance models in operation in the diocesan elementary schools: parish-owned and operated schools and “regional” schools, which in actuality, are diocesan schools under the direction of the Department of Catholic Schools. In some cases, these models are operating well, but for others a different structure and/or governance model may be more effective. Both of these current models could be maintained for the future where they work well.

A third model for consideration as the planning process moves forward is an interparochial or interparish model, such as the “Amherst Catholic School” model proposed as part of the “Journey In Faith and Grace” diocesan plan. In a number of dioceses around the country this type of governance model is referred to as a “system” and has been an effective way to reorganize parish-owned schools and build broader ownership and support. If this particular governance model is considered, the civil and canonical status of the interparish network or system would have to be determined along with the board/council structure that would provide governance leadership.

There is another model operating in the Diocese where the schools are separately incorporated, public juridic persons where the Bishop has specific reserved powers (e.g., Catholic mission and identity). This model is in effect for the former diocesan high schools, which are governed by a Board of Directors/Trustees.

It is important to note that there is no one model that will fit all schools in terms of structure, governance or administration. As the strategic planning process continues, solutions will be needed to address the specific circumstances and uniqueness of particular areas. In any case, the Bishop would have to determine the parameters in terms of which models will be accepted in the Diocese.

There are several areas in the Diocese where consideration for a different structure and/or governance model could be part of the dialogue in the next phase of the strategic planning process. It will be important in moving forward to not simply close, merge or consolidate schools, but look at other possibilities. Initial structure and governance considerations in each Vicariate would be developed at the start of Phase 2 in the planning process based on the data, input and feedback gathered and presented as the result of Phase 1 efforts.

## **IV. RESPONSES: CATHOLIC ELEMENTARY SCHOOL FUNDING PLAN – STRENGTHS AND CHALLENGES**

The Catholic Elementary School Funding Plan was devised to provide on-going financial support for newly established regional schools, and provide financial aid to parish schools where non-parish students are enrolled. All parishes are to be involved in providing support by means of a formula based on their annual ordinary income/regular receipts. The funding plan allows for additional support beyond the formula for parishes that wish to provide more.

### **STRENGTHS**

1. Promotes the concept of support for Catholic school education promoted by the U.S. Catholic Conference of Bishops: “The burden of supporting our Catholic schools can no longer be placed exclusively on the individual parishes that have schools and on parents who pay tuition. This will require all Catholics, including those in parishes without schools, to focus on the spirituality of stewardship.” (Renewing Our Commitment to Catholic Elementary and Secondary Schools in the Third Millennium; 2005)
2. Provides a revenue stream for non-parish affiliated elementary schools that would not receive parish financial support/investment.
3. Established formula based on a percentage of parish ordinary income acts as an incentive for parish investment as opposed to an amount of funding per enrolled student, which can serve as a disincentive.
4. Provides the regional schools with a predictable source of revenue.
5. Provides a collection and disbursement system of parish investment funds that integrates oversight and accountability to ensure the schools receive essential revenue and apply it effectively.

### **CHALLENGES**

1. The concept of all parishes making a financial investment for Catholic schools is not widely accepted by all parishes/parishioners. There is a need to educate parish communities about the investment opportunity.
2. Parish investment funds are limited and the formula does not allow for the addition of any more regional schools into the system.
3. The parish assessment formula was established based on the needs of the schools at the time. There has been no long-term allowance for increases or growth in the fund outside of a carryover during the first two years or so of its establishment.
4. Some parishes, especially in the current economic situation, are unable to meet their designated investment expectation.
5. There is a need to work with schools to increase tuition rates, development and fundraising revenues so there is a decreasing reliance on CTAP funds and diocesan support.
6. The \$1,000 CTGP investment for parish-based schools has remained unchanged while school expense has increased.

7. Schools have been setting tuition rates for the next school year and then developing the annual operating budget. Generally, the tuition rates have been based on what those least able to pay are able to take in a tuition increase.
8. With parish restructuring, there are fewer parishes to contribute funding.
9. The current economic downturn has negatively impacted parish regular receipts which, in turn, can decrease the amount of funding available for the school fund.

## **V. RESPONSES: DIOCESAN ADVISORY COUNCIL ROLE AND RESPONSIBILITIES**

The Diocesan Advisory Council, recently reconstituted, is an effective tool in working with the Bishop and the Department of Catholic Schools in fulfilling the Diocese's mission of Catholic education in the elementary schools. The Council shall advise and cooperate with the Bishop and Department of Catholic Schools in the review, implementation and evaluation of policies and programs for the schools.

In the Diocese of Buffalo, the Diocesan Advisory Council could exercise its leadership in a number of ways to continue promoting Catholic school education:

1. Promote strong Catholic identity in the schools.
  - Focus on mission effectiveness – diocesan and local levels
2. Support leadership development at the local school and diocesan levels.
  - Develop a pool of potential candidates to serve on DAC committees as a stepping stone to Advisory Council membership
  - Work with local advisory boards to establish and effectively use committees
  - Host an annual gathering of local advisory board chairpersons to share best practices
3. Assist local school advisory boards to operate effectively and efficiently.
  - Support and encourage local advisory board in-service and training
  - Serve as liaison for local advisory boards at the state and national levels
  - Evaluate in-service and training opportunities for local advisory boards
  - Interact with local advisory boards, visit/attend local school board meetings with Diocesan Advisory Council feedback
4. Support quality academic preparation for school children.
  - Serve as a networking resource to connect various private and public education institutions with the Department of Catholic Schools and the local schools
  - Work to establish partnerships with various institutions to promote educational innovation
  - With the Department of Catholic Schools, review ongoing school progress in light of the Desired Characteristics of Vibrant Elementary Schools
5. Pursue accessible and affordable Catholic school education.
  - With the Department of Catholic Schools and Office of Finance, review a periodic financial survey of the schools
  - Investigate methods to secure financial affordability with the Department of Catholic Schools and Office of Finance
  - Hold periodic meetings with local school finance committees/leadership to monitor financial policies and procedures
  - Develop a finance component to meet specific in-service needs of local schools and their advisory boards



- Provide direction and expertise in the area of institutional advancement and marketing at the diocesan and local levels
6. Advocate for quality Catholic education through involvement in the civic and local/state political arenas.
    - Promote and support efforts to build a high quality public image of Catholic schools in communities across the Diocese
    - Provide leadership and direction in promoting Catholic school education throughout the Diocese
  7. Assist in the implementation of the diocesan strategic plan with the Department of Catholic Schools and the local school communities.
    - With the Department of Catholic Schools, review the progress in implementing “Visioning for the Future” and next steps to be taken as implementation continues.

## **VI. A VISION FOR THRIVING CATHOLIC ELEMENTARY SCHOOL EDUCATION IN THE DIOCESE OF BUFFALO**

### *Visioning for the Future*

The following statement identifies essential elements necessary to sustain Catholic elementary school viability over the long term in the Diocese of Buffalo.

The U.S. Bishops emphasize that “The Catholic schools’ mission is vital to the future of our young people, our nation and, most especially, our Church.”<sup>2</sup>

#### **MISSION**

1. Each school has an authentic Christ-centered mission which fosters personal pride in, knowledge of and commitment to the Catholic faith.

#### **CATHOLIC IDENTITY**

1. The school promotes a personal life-long relationship with Jesus Christ wherein students understand and practice the Catholic faith and traditions.
2. Catholic values permeate the curriculum and educational program. Prayer, worship and liturgical experiences enhance the faith life of students, families, faculty, and staff.
3. Pastors, canonical administrators and diocesan leaders are actively engaged in their schools to ensure the Catholic identity is strong and evident. Their presence in the schools, as often as possible, enhances this identity.
4. The Sacraments, especially Eucharistic liturgy, are the source of faith formation in Catholic schools.
5. The relationship between school families and their parish is strong and mutually supportive. The parish and school work collaboratively to provide religious formation, sacramental preparation and opportunities to grow in faith.
6. Principals and teachers are mature in their faith, act as role models to their students and have a sense of being called to the ministry of teaching in a Catholic school.
7. Serving others is a hallmark of every Catholic school. Students are actively involved in service opportunities as witnesses for Christ in parishes, communities and in the world at large.
8. Families from diverse backgrounds in terms of ethnicity, race, economic status and ability are welcomed, respected and served. School enrollment reflects the diversity of the parishes and local community being served.
9. Parents, and all of the faithful, understand and act on their responsibility to raise or support the next generation of Catholics with a living and active faith in Jesus Christ. Catholic schools are viewed as a vital ministry to the educational mission of the Church.

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<sup>2</sup> *United States Conference of Catholic Bishops*, “Renewing Our Commitment to Catholic Elementary and Secondary Schools in the Third Millennium”, 2005.

## **LEADERSHIP**

1. The Office of the Bishop and diocesan leaders recognize and support Catholic schools as a ministry vital to the future of the Church.
2. The school's governance, policies and procedures reflect the mission of Jesus Christ, the Church and professional ethics.
3. The Department of Catholic Schools provides vibrant leadership for the mission of Catholic education, supporting school leadership and holding them accountable for the religious and academic mission of the school.
4. Pastors, canonical administrators and diocesan leaders provide vital spiritual leadership and actively promote Catholic schools as an important ministry of the Church and community at large.
5. Pastors, principals and other administrators collaboratively engage with and provide for the growth of the School Advisory Committees/Boards, faculty and staff. The community respects school leaders as Christian models for students.
6. Principals and teachers of religion, as well as a majority of teachers are committed, practicing Catholics. Teachers from other traditions are faith-filled individuals who respect the teachings of the Catholic Church and present themselves as positive role models for students.
7. Principals are state certified, highly skilled, professionally competent and participate in ongoing professional development and are actively involved in ensuring the long term viability of the school.
8. The local school board/education council is knowledgeable about its role, is actively engaged in strategic long-range planning, and proactive in its approach to the future of the school.
9. Parents are committed to their parish and school sharing their gifts and talents to further the Church's mission.
10. The school develops partnerships with local businesses, college/universities, and social agencies to be involved with and invite involvement from the wider community.
11. It is the shared responsibility of principals, pastors, canonical administrators, and board/councils to ensure the viability and sustainability of the school.

## **ACADEMIC EXCELLENCE**

1. Families recognize that Catholic schools are equal to or better than other educational options. The school excels academically, meeting or exceeding national, state, and diocesan curriculum standards.
2. Instruction is differentiated, teaching strategies are varied and creative methods are used to meet the needs of all students – gifted, average and academically challenged.
3. A holistic approach to teaching and learning is used. Students are engaged at every level – mind, body and soul.
4. Each graduate leaves school prepared with age-appropriate faith formation, life and learning skills, and character development as the foundation of success for their future.
5. Teachers possess appropriate academic credentials, are professionally competent, actively engaged in ongoing professional development, and dedicated to Catholic school education as a ministry.

6. Technology is updated and available to teachers and students in the classrooms. Technology is understood as a tool to enhance the educational experience.
7. Extra-curricular and co-curricular programs that support and enhance the school's mission and curriculum are offered for students.
8. Parents are involved in the school and valued as partners in the education of their children.
9. Teaching resources are available that enhance the motivation of teachers and the quality of instruction.

## **ENROLLMENT**

1. Catholic schools build a strong image of quality education in the context of their Catholic mission. Schools are widely known and actively promoted for their excellence in education and faith formation throughout the Diocese.
2. Parents of school students, both Catholic and non-Catholic, appreciate the worth of a Catholic education for their children. They value Catholic schools at a level that easily justifies a substantial investment.
3. Effective and well-funded marketing and enrollment management programs support each school.
4. A school operates with optimal enrollment, allowing it to offer more program offerings, provide better stewardship of resources and more affordable education for all.
5. Catholic schools effectively retain students from pre-kindergarten through 12<sup>th</sup> grade.

## **FINANCIAL VIABILITY**

1. Schools have sufficient revenue to fund a quality program, invest in technology and provide a well-rounded program. School budgets are balanced.
2. Schools have a mature advancement/development program. Boards/councils are engaged and provide leadership for school development efforts.
3. Catholic schools are affordable for parishes and parents who desire a Catholic education for their children. Tuition assistance is available for families that desire a Catholic education for their children but for whom the opportunity is economically unreachable.
4. All parishes make a substantial and long-term commitment to funding Catholic education.
5. Teachers, administrators and staff receive just and competitive compensation and benefits.
6. Facilities are well-maintained, attractive and updated to support current educational programming.

## **FACILITIES**

1. All facilities provide sufficient space for a quality program and are attractive, safe and well-maintained.
2. Schools have the type of facilities, technology and equipment needed to provide a quality Catholic elementary school education.
3. In planning renovated or new schools for the future, sensitivity for the environment and ecology will be valued.

## **VII. DESIRED CHARACTERISTICS OF VIBRANT CATHOLIC ELEMENTARY SCHOOLS**

Below are characteristics that are widely held to be indicators of viability of a quality Catholic elementary school. These characteristics incorporate many areas of school life. Certainly financial and enrollment trends must be considered along with the overall affordability of the school to families and parish. However, a close look must be given to the viability of the school from the standpoint of the spiritual and instructional programs and the staffing of the school. Therefore, to insure a quality Catholic school, characteristics have been provided to assess the school's Catholic identity, academic program, facilities and leadership.

Note that a concern about any one of these characteristics does not mean that a school's viability is in question. However, concern about a combination of these characteristics may indicate that a school's viability is at risk.

### **MISSION**

1. The school's mission statement is clear, concise and communicated well to all constituencies and in appropriate written communications.

### **CATHOLIC IDENTITY**

1. Signs of the Catholic faith are clearly evident: art and decor, prayer and worship experiences for staff and students, religion classes at every grade level, regular opportunities to receive the sacraments, etc.
2. Religion teachers are Catholic and are certified or working toward appropriate certification in religious education. Students and staff are involved in service opportunities in school and the larger community.
3. The school cooperates with its sponsoring parish(es) in the evangelization of students, families and the community.

### **LEADERSHIP**

1. Diocesan leaders, pastors and canonical administrators collaborate and partner with school administrators and the Education/School Advisory Boards in providing strong leadership and direction for the schools.
2. Administrators are appropriately qualified in terms of professional, spiritual and instructional leadership and participate in an annual evaluation process which includes goal setting.
3. School administration is cooperative with the Department of Catholic Schools and in compliance with diocesan policies and guidelines.
4. An effective governance board or advisory council is in place and actively provides support for the school and the administration.
5. The school has a 3-5 year strategic plan which is being implemented.

## **ACADEMIC EXCELLENCE**

1. A viable school improvement plan is in place which is based on objective measures of student achievement and sound pedagogical principles.
2. Administrators and faculty engage in professional development activity to maintain state certification requirements and professional teaching standards.
3. Administrators and faculty engage in curriculum and instructional planning and ongoing assessment that recognizes and values:
  - different learning and teaching styles
  - various models for student assessment
  - analysis of standardized test scores
  - relevant and effective educational trends
  - the use of technology to enhance instruction
4. The academic program meets and exceeds New York State educational standards.
5. The school offers a complete education program including art, music, physical education, computer education and age-appropriate co-curricular activities.
6. The school is fully accredited through the Middle States Association.
7. All staff members have, or are in the process of securing, state teaching certification.
8. Diocesan leadership and local colloquiums provide professional and spiritual development opportunities to support and enhance local school efforts/programs.
9. Parents are actively involved in school activities, the Home School Association or similar groups, etc.
10. Textbooks, technology and other educational resources are up to date and effectively used to support instruction.

## **ENROLLMENT**

1. Pastors and canonical administrators, with the Education/School Advisory Boards, administrators, and all the faithful promote and support the value and benefits of a quality Catholic school education.
2. Enrollment patterns are stable and healthy enrollment is maintained in grades K, 1 and 2.
3. Current enrollment per classroom averages 20 to 25 students.
4. There is evidence that the future pool of children is stable and sufficiently large to meet the enrollment and financial needs of the school, and justify its future continuation.
5. The school is actively engaged in marketing, recruitment and retention.
6. The retention rate is 85% or above for each of the last three to five years.

## **FINANCES**

1. The school is operating within a balanced budget and can reasonably be expected to maintain a balanced budget for the next three years, based on realistic projections of enrollment and finances.
2. The revenue mix is at or steadily progressing toward that which is recommended by the Diocese.
3. The school is able to compensate teachers justly according to established salary and benefits guidelines.
4. Parish investment is within the diocesan recommended range.
5. The parish/school has a tuition assistance plan with adequate sources of funding to implement it.
6. The school is implementing a successful development plan that includes an annual fund, special events, alumni relations and appropriate marketing and public relations.
7. The school demonstrates an efficient and wise use of revenue in maintaining a quality educational program.
8. Adequate funding is budgeted to maintain facilities in an attractive condition.
9. Realistic sources of funding have been identified for capital improvements and major repairs.

## **FACILITIES**

1. The school has a sufficient number of classrooms.
2. Sufficient space is provided for programs or special classes including science, music and art, worship space, library/resource room, cafeteria, gym and playground, to meet the diverse needs of the students.
3. Appropriate types of facilities, technology and classroom/learning resources are provided to sustain a quality school program.
4. The facility is maintained in good condition with minimal deferred maintenance.
5. Environment is safe and secure.
6. Facilities and grounds are attractive and clean.

## VIII. RECOMMENDATIONS

### A. School Organization and Structure

1. The *Desired Characteristics of Catholic Elementary Schools* serve as a key element in the regular school assessment process.
2. A local planning and consultation process will be developed and implemented to assist schools in need of reorganizing or restructuring for the future.
3. As part of the larger strategic planning program (Phase 2):
  - Initiate the local planning/consultation process (*Recommendation 2 – School Organization and Structure*) with the schools identified as “crisis” and requiring immediate attention and support. Begin the process in the current school year, 2009-10.
  - Initiate the local planning/consultation process with schools identified as “at risk” in the 2010-11 school year.
4. Research and implement multi-school configurations where a cluster of schools are joined together to form a single institution that is directed and supported by a central governance body and funding structure. The network would allow for more local centralization, sharing of resources, greater collaboration and mutual support, while preserving the unique identity of individual schools.

### B. Leadership

1. The value and benefits of Catholic school education are well defined and actively promoted by all leaders at all levels – diocesan, pastors, canonical administrators and parish lay leaders, school administrators and parents.
2. The mission and vision of Catholic school education in the Diocese are clear and concise, based on the educational and evangelizing mission of the Church, and flowing from the vision of the Bishop. This mission is promoted in all appropriate diocesan communications.
3. Promotional materials at the diocesan and local parish/school levels include research-based talking points focused on the positive impact of Catholic school education on our Church and society.
4. All the faithful of the Diocese of Buffalo are educated and reminded of their role and responsibility in actively investing in Catholic school education to ensure the future of the Church through young people.
5. The Diocesan Advisory Council operates in an advisory role to the Bishop and Department of Catholic Schools to provide a common vision, direction and effective oversight for the future Catholic elementary school education as developed through the *Strategic Plan*.



6. **Developing strong leaders to carry on and fulfill the educational mission of the Catholic elementary schools should continue to be a priority throughout the Diocese.**
7. **Diocesan departments are available to consult and collaborate with schools to develop and implement an intervention team to support schools experiencing challenges in areas such as: finances, enrollment, governance, facilities, academic achievement or other areas deemed appropriate.**

### **C. Education Program**

1. **A student profile, “The Graduate at Graduation” provides a necessary framework and philosophical direction for both school culture and curriculum development. The profile identifies spiritual, academic and personal characteristics that are hallmarks of a Catholic elementary school education.**
2. **The Department of Catholic Schools in cooperation with local colloquium leadership provides high quality professional development and ongoing educational/informational opportunities for all clergy, canonical administrators, school administrators, faculties and staff.**
3. **Establish a “continuum of Catholic school education”, grades PreK to 16, by means of collaborative planning in terms of potential partnerships, resource sharing and curriculum/program development, particularly among the Catholic elementary schools, high schools and local colleges/ universities.**

### **D. Governance**

1. **Every elementary school, parish and regional, has an active education advisory council or board in place. The councils/boards will receive appropriate pre-service and in-service regarding their role and responsibilities. Boards and councils will participate in a yearly self-assessment process that includes standards, evaluations, development plans, and the involvement of members and administrators. Through this process improvement plans will be drafted and goals identified to improve the quality of board member leadership and their effectiveness.**
2. **Pastors and canonical administrators regularly engage and collaborate with school administration and the Education Advisory Councils/Schools Boards to empower their leadership role and responsibilities.**
3. **Membership of the education councils/boards follow the guidelines and qualifications established by the Department of Catholic Schools.**

4. **Boards of limited jurisdiction for schools will be initiated whenever possible to enhance the level of ownership and participation in the schools. Appropriate direction and ongoing training is provided to define the specific areas of responsibility included as part of this limited jurisdiction.**
5. **Pastors, canonical administrators and school administrators receive direction and training in how to effectively lead and use education councils/boards, advisory or limited jurisdiction.**
6. **A change in the governance model of a school will be made when it is evident that it will not remain viable or sustainable under its current structure.**
7. **A connection of parishes and involvement of pastors is fostered and maintained with every elementary school.**

## **E. Finances**

1. **All schools develop a long-range financial plan with, at minimum, a 3-year financial projection, to grow their revenue. Diocesan leadership, with school leaders, will create a financial forecasting or projection tool that can be used by all schools. Special attention is paid to increasing development funding and tuition.**
2. **Continue implementation of the 60-25-15 school funding plan. A financial plan and timeline for each school will be developed to support efforts to reach these goals by 2014.**
3. **For parishes with no possible access to a Catholic elementary school, review the support formula and consider alternatives such as increased offertory giving over a given time period. Specific limits on increases or decreases in parish investment/support should be identified and implemented in line with changes in parish regular receipts.**
4. **Research and implement a school accounting system and common chart of accounts that are school-friendly and allow for ease of recording and preparing financial information.**
5. **As funding allows, include a capital transfer fund in the school's annual budget for major capital projects or emergencies. These monies are transferred to a restricted account, allowed to accrue and be available for capital improvements in the future.**
6. **A uniform program of benefits offered to all school employees will be researched and introduced.**

## TUITION REVENUE

- 1. Tuition rates are increased annually according to the financial plan and projection developed by each school.**
  - Tuition rate increases are determined according to those who can better afford an increase. Financial assistance should be available to support those who can least afford an increase.
  - The tuition rate for the 2<sup>nd</sup> and 3<sup>rd</sup> child will be moving toward 75% to 80% or more of the first child rate, with increased financial assistance to support multiple child and low income families.
  - Projecting tuition rates in the school's financial plan will consider local median family household income levels, average net household worth, among other data points.
- 2. Parents are educated regularly on the cost of a quality Catholic school education so they clearly understand the total cost of education and what they receive for their tuition. Encourage those who can afford the cost of education to invest and contribute the difference from the tuition rate. This opportunity could be directly linked to the school's development efforts.**
- 3. Preparation of the annual budget serves as the starting point for determining the tuition rates for the next school year, rather than setting the tuition rates and then developing the operating budget.**

## PARISH INVESTMENT AND SUPPORT

- 1. In a spirit of ecclesial collaboration and in line with the United States Conference of Catholic Bishop's statement, "Renewing Our Commitment to Catholic Elementary and Secondary Schools in the Third Millennium", that "the entire Catholic community – clergy, religious and lay", all support Catholic school education. Investment should continue to follow the general principles outlined in the funding for parish schools and the Catholic Elementary School Funding Plan.**
  - The parish percentages of investment for the regional schools need to be reviewed in light of the trend in regular receipts of the parishes and the investment needed in the schools.
  - Review the level of support (\$1,000 per non-parish student) to parish-based schools and integrate an increase for the future.
  - The auto debit system for the parish investment payments continues to be expanded to all parishes in order to ensure that payments are met.
- 2. Parish investment will be a maximum of 35% of parish regular receipts, with a phase-in of reduction for those exceeding the 35%. Parish investment as a percent of school revenue will be 25%.**
- 3. An annual campaign for school tuition assistance will be considered as part of the development efforts of the Diocese and school.**

- 4. A broader, more regional approach to funding should be considered, primarily in the areas where there are a large number of schools and a high level of enrollment overlap.**

#### **FINANCIAL ASSISTANCE**

- 1. Financial assistance will be funded first at the local level as much as possible. Local school development efforts will be increased to generate necessary funds for assistance to complement monies received from the Diocese, parishes, or other funding sources.**
  - New terminology may be needed to make assistance palatable and acceptable to more families. Terminology such as scholarship, tuition adjustment, or discount may be helpful.
  - The financial assistance budget should be minimally 6% of total tuition income.
- 2. Schools will increase local third-source financial assistance.**
  - Participate in the new Catholic Alumni Partnership program combined with location efforts to build alumni relations.

#### **F. Enrollment Potential**

- 1. As a ministry integral to the Church's educational mission, all parishes actively promote Catholic school education, encourage parents to choose a Catholic school for their children, and provide a supportive environment for the schools.**
- 2. Aggressive marketing at the diocesan and local levels is implemented to develop broad public audiences, create a strong image in the education marketplace, and actively promote the Catholic schools as a preferred option for education throughout the Diocese.**
- 3. Every school has a comprehensive enrollment management plan in place, addressing marketing, communications, recruitment and retention, alumni relations and legacy of students, among other components of such a plan.**
  - Collaborative marketing efforts are explored in areas where there are several schools with overlapping enrollment patterns.