

*DISCIPLES ON THE WAY*

# **STRATEGIC & MISSION PLAN FOR CATHOLIC SCHOOLS**

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*January 2018*



Diocese of  
Green Bay



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# INTRODUCTION

## Vision

We are missionary disciples striving to lead all people to the Kingdom of God.

## Mission

As friends and followers of Jesus, we are devoted to fostering households and communities of discipleship through the mission and ministry of the Catholic Church. *Communities of Discipleship*: Discover Jesus, Follow Jesus, Worship Jesus, Share Jesus with others.

As stewards of the gifts and resources God has given to His church in the Diocese of Green Bay, the diocese has formed a strategic plan to guide the ministry of Catholic schools going forward. The plan provides a cohesive direction and vision that will be lived out within each parish, school, and system of schools.

The plan was formed through in-depth study and dialog from August 2016 through September 2017. The process was led by the consultants at Meitler, a nationally recognized leader in Catholic school education. The planning process was designed to implement the mission and vision of the diocese, that is to make missionary disciples through the work of Catholic schools whereby schools impact students, their families, and the community. The plan builds upon the good work done in prior planning initiatives and the progress that resulted.

The planning process included several opportunities for parish and school leaders to contribute to an understanding of the current state of Catholic education, offer ideas that would shape the plan, and respond to proposed goals and strategies. The preliminary plan was publicly presented to Catholic school leaders for discussion and feedback on September 22, 2017. Guiding the development of the plan was a planning committee, steering committee, and working groups.

Many of the Catholic schools within the diocese are healthy, continuing a strong tradition of excellent Catholic education. Catholic schools are producing graduates known for their excellent academic preparation, technological competencies, values and Catholic identity, and personal life skills. Schools embrace the Gospel message of serving others both locally and globally and students are guided to live as missionaries inspired and capable to spread the Gospel and defend their faith.

As you read and use the plan, prayerfully consider how it will shape the future of your school toward a healthy strong future.

### Thanks to the Planning Committee who worked so diligently to lead the planning process.

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# I. SCHOOLS OF DISCIPLESHIP

## Observations

- a. At the Catholic schools visited by the consultants, there were varying levels in the visual appearance of classrooms, hallways, and public spaces giving a sense of Catholic identity. There is an ongoing need to create and foster a more intentional discipleship-oriented culture within the environment of the school. This includes a more creative and aesthetically appropriate incorporation of the Catholic faith into all aspects of the school environment and community.
- b. The divergence between the mission of Catholic education and the reasons parents choose Catholic schools continues to grow. Pastors, principals and boards are concerned that for this new generation of parents matters of academic excellence, safety, and discipline are greater priorities than faith formation. A growing number of Catholic families do not participate in parish life, or will join a parish to get the Catholic (in-parish) tuition rate but not attend Mass. This leads to frustration among Catholic school leaders, pastors and principals who do not have a well-developed response or strategy. Evangelization and outreach is critical in forming disciples who embrace the educational mission of the Church and can articulate that vision to others. Finding strategies that engender communities of discipleship among parents must be a priority.
- c. The diocese is experiencing a serious decline in Mass attendance in the majority of parishes. The number of funerals outpaces the sacraments of baptism and first communion in the majority of parishes. Youth and young adults are increasingly absent from parishes.
- d. Pastors connected to Catholic schools are giving significant financial support and spiritual leadership in many schools. Schools that have committed and engaged pastors in the schools demonstrate more authentic Catholic identity than schools where pastors do not feel connected. School systems, more than any other, have struggles engaging pastors. Pastors may not feel the same responsibility for the spiritual care of students as they do for their own parishioners. School systems are encouraged to seek more avenues for pastors to engage with the school communities and share in the vision of the school community.
- e. The diocese has a new rubric in place for assessing Catholic identity. Standards and benchmarks have been updated to include the integration of Catholic identity. As the diocese puts a new emphasis on forming missionary disciples and fostering communities of discipleship, teachers will benefit from formation that enhances what is already in place to make faith a personal experience and model the same for students.
- f. ACRE scores for students in Catholic schools in the diocese are well above the national average, and higher than those of students in religious education classes. Formation of students as disciples and leaders needs to be authentic, relevant, and purposely incorporated into all subjects.
- g. Pastors cite the need to create engaging religion/theology classes that convey the Catholic faith as a way of life and not limited to a subject to study. Faith building for students must touch the heart and appeal to the spirit. Pastors suggest doing a better job with meaningful community service projects and retreats.
- h. The percentage of Hispanic students in Catholic schools is very small. These families sometimes live invisibly among the community because they do not attend English Mass where they reside. Often they will drive miles to a Spanish Mass, so the pastor in their community has no idea of their presence. Historically in the diocese, Hispanic children have not been systematically recruited to apply to Catholic schools. Schools such as St. Thomas More Catholic School and St. Bernard Catholic School have been very intentional in their outreach and have seen a rise in the number of Hispanic families and students

enrolled in their schools.

- i. Some pastors are unwilling to support their Catholic schools publicly for fear of alienating religious education parents. Some parishes do not have good relationships between religious education staff and school administration, thereby obstructing the recruitment of families in religious education for Catholic schools. A concerted effort should be made to bring these groups together and encourage families to consider a Catholic education for their children.

## A. INTENTIONAL PARTNERSHIPS BETWEEN PARISHES AND SCHOOLS

The mission of Catholic schools is to form disciples of Jesus Christ. Catholic schools are empowered to provide a distinctly Catholic education and environment, with high standards of academic excellence for all members of the communities in which they serve. Catholic education includes deliberate efforts, both formal and informal, to foster students in knowledge, faith, and virtues needed for a life formed by Catholic values. Bishop Ricken’s vision is for the people and organizations who make up the diocese to begin impacting everyone in their community through a missionary discipleship approach. The vehicle of education is the core process to lead people to the kingdom of God through a relationship with Christ.

The mission of creating households and communities of discipleship is closely integrated in the mission of Catholic schools. Catholic schools exist to teach and pass on the Catholic faith and values, through a living embodiment in the communities in which they are present. Catholic schools have a tremendous opportunity to impact the communities through parish life and education but, most importantly, through modeling and exemplifying what Catholic life and education can do to impact the communities around them. These opportunities are not without challenges, but at this point in time, there is a hunger for spiritual values and belief in Christ. Communities and people want more and are hungry to learn what can be offered to them.

The pastors and educators will have the leadership role of making Catholic school education a core part of community life in all areas where parishes and schools exist together. The combined impact of parish life and Catholic school education provides an overwhelmingly positive alternative to the secularism in our society and through the people of God’s Church, we will locate and find the hunger that people have for a Catholic spiritual life and nurture that hunger through our educational process.

The mission of Catholic school education and the Catholic identity of these schools must be modeled and carried forth by administrators, teachers, staff, pastors, the parish family and the greater Catholic community. This model of life-giving spiritual worth will become an irresistible attraction to the hunger that communities have for a deeper sense of faith and meaning.

### Priority/Goal

1. **Catholic schools in partnership with parishes will embrace the mission and vision of the diocese to form missionary disciples of Jesus.**

#### *Strategies and steps*

- 1.1 Mission and vision statements will be evaluated and aligned with the emerging emphasis on transforming parishes and schools into a discipleship approach, focusing on impacting and improving community life with the Gospel. Catholic schools will grow as schools of discipleship. Mission statements should mirror the diocesan mission – *“Catholic schools, in partnership with the faith community, share knowledge, give witness to the Gospel message, serve others, pray and worship.”* for Catholic schools. Vision statements should reflect how the mission will be accomplished at the local level.
- 1.2 An action plan will be developed with the leadership of the Office of Catholic

Schools using the framework of the diocesan mission of discipleship.

The action plan will include:

- a. The development of a taskforce of visionary pastors, school leadership from both parish schools and systems, religious education leadership, parish leaders, community leaders and diocesan staff to develop strategies for schools and parishes to work together more effectively, and to engender spirituality and missionary discipleship in school/parish communities.
- b. The Bishop will facilitate meetings with pastors to gain mutual understanding as to why Catholic school education is crucial to the sustainability of the Catholic Church and how their leadership and gifts can make Catholic schools more effective in building disciples.
- c. Pastors will have a substantial role and actively collaborate with principals to support teachers in their spiritual growth and guide their spiritual formation through in-services, retreats and professional development. Pastors will facilitate the development of communities of faith among the faculty and provide spiritual guidance and preparation in forming schools of discipleship.
- d. To create a cohesive vision of how best to educate children about their faith, gatherings with religious education leadership at the parish level should take place to gain a deeper understanding of concerns and seek resolutions to present a more collaborative effort to the parish community. Religious education personnel will be included in spiritual formation and also provide spiritual support for the faculty as appropriate.
- e. A regular vocations initiative will be a part of the Catholic school experience for all students and faculty. It could be a diocesan-wide initiative for specific grades or planned for all students to participate in some way.

**2. School families will be actively supported through many types of parish ministries. Collaboration will be enhanced between schools and the parishes, specifically with pastors, parish staff, parish religious education staff, and parish ministry leaders.**

*Strategies and steps*

- 2.1 Both parish school and system leadership will meet routinely with pastors and heads of religious education to actively partner with their local parish(es) and build communities of faith.
  - a. In forming disciples, each school staff will work actively with its pastor(s) and parish staff to identify how discipleship formation occurs through every aspect of the school program. Collaborative planning between parish and school staff will include specific ways the school is part of the life of the parish and the parish is part of the life of the school.
- 2.2 In collaboration with parish staff, schools will plan and schedule activities that involve students and staff in parish worship, service projects, liturgies, and other parish events.
  - a. As a vehicle for making disciples, each school will work actively with its pastor(s) and parish staff to identify the means by which discipleship can occur through every aspect of the school program.
  - b. As a key to evangelization, each school will work actively with its pastor(s) and parish staff to develop a plan that will intentionally reach out to families and include them more fully within the life of the parish.
- 2.3 The Bishop will make every effort to assign priests to serve as pastors to parishes with schools who are supportive and understand the mission of Catholic schools.

- a. To gain a firm understanding of their role and responsibilities, pastors new to a Catholic school should attend the University of Notre Dame's summer School Pastors Institute facilitated by the Alliance for Catholic Education.
  - b. The Office of Catholic Schools will provide regular opportunities for interaction between Catholic school pastors and principals.
- 2.4 Parishes will convey a welcoming spirit and promote communications about Catholic school education. Parishes will share databases to help facilitate the communication.
- 3. Continue to define the role of pastors especially in school systems. Their role should be one of providing spiritual leadership and forming the faculty and staff to be disciples of Christ.**

*Strategies and steps*

- 3.1 The Office of Catholic Schools in consultation with pastors, and with input from the presbyteral council, will lead the conversation to better define a productive working relationship. Best practices will be identified and shared.
- 3.2 Schools will be creative in identifying substantive leadership roles for pastors that strengthen the school of discipleship.
- 3.3 Schools will actively invite pastors to participate in events more than celebrating Mass. There will be active invitations to pastors to have a substantial role and to engage in the life of the school at all levels:
  - a. Lead in-services for faculty and staff that focuses on their spiritual formation and journey of discipleship.
  - b. Have an active and purposeful leadership role at events.
  - c. Have an orchestrated purpose with the school beyond visiting classrooms that builds upon the instruction students are receiving.
  - d. Carry on discussions with students about their future vocation.
  - e. Witnesses to the students and models a life consistent with Gospel values.
- 3.4 The Office of Catholic Schools will provide Catholic school pastors resources for their role and responsibilities and create a Guide for Catholic School Pastors.

## B. FORMATION FOR FACULTY, STAFF, ADMINISTRATORS

### Priority/Goal

- 4. Educators will both understand and model the meaning of a missionary disciple, so they can lead students to become faith-filled followers of Christ. Schools will have a plan to develop the spiritual life of each educational leader and teacher involved in Catholic school education to enhance their professional lives with carryover to their personal lives.**

#### *Strategies and steps*

- 4.1 The Office of Catholic Schools, working with pastors and school leaders, will re-evaluate and build upon the current ongoing system of formation and religion certification to foster and cultivate a culture of missionary discipleship.
- Formation opportunities through in-services will be provided on a regular basis to form disciples and strengthen the commitment to the Catholic mission of the schools.
  - School and system leadership will encourage the creation of small faith communities in schools among faculty and staff. This can be a continuation of Alpha groups.
- 4.2 School and system leadership with assistance from pastors as well as the Office of Catholic Schools, the Religious Education/Youth Ministry Office, and the Department of New Evangelization will provide expanded opportunities for spiritual formation, retreats, liturgies, and prayer services for faculty and staff.
- School and system leadership will encourage teachers and staff to share the beliefs and values of their faith with one another through word and action. Opportunities for sharing and building faith community in small group settings will be provided.
- 4.3 Orientation programs for newly hired administrators and teachers will be re-evaluated to ensure that they immerse new personnel into missionary discipleship and the ministry of Catholic education. Participants will have opportunities to fully understand how schools are a means of discipleship and the role they have in evangelization.

## C. EVANGELIZATION AND FAITH INTEGRATION FOR SCHOOL FAMILIES

### Priority/Goal

- 5. Schools, along with their sponsoring parishes, will be on the front line of evangelization and outreach to parents and families, drawing them into a closer relationship with Christ and His Church. Catholic identity will migrate beyond school to the home.**

#### *Strategies and steps*

- 5.1 School and system leadership will articulate to all parents the evangelizing mission and role of Catholic schools in the faith lives of their children and the supporting role of the family. Parishes will reinforce the message.
- 5.2 Schools and parishes working in collaboration will support, empower and resource parents and guardians in their primary role of making disciples and fostering life-long faith spiritual development with their children.
- 5.3 The Office of Catholic Schools and the Religious Education/Youth Ministry Office will generate parent communication pieces and school-based opportunities to ensure that all receive the same

cohesive message to help families incorporate faith formation and prayer into family life.

- a. A study guide that mirrors and reinforces what students are being taught will be created for home use by families.

**6. Each school will effectively provide ongoing discipleship formation for students that articulates the vision for Catholic schools.**

*Strategies and steps*

- 6.1 The practice and witness of the Catholic faith, including values and lifestyle, will be rooted in all curricular and extracurricular activities.
  - a. Schools will regularly assess themselves utilizing ACRE scores and WCSA accreditation standards, and determine satisfactory diocesan benchmarks.
- 6.2 The Office of Catholic Schools will seek counsel from a committee of pastors, youth ministers, and school and parish lay ministers to envision and create more lively theology/religion classes and opportunities for faith formation that are integrated throughout the Catholic school experience.
  - a. Substantial formation programs and activities will be in place at each school that nourish both mind and heart.
  - b. The study of scripture will be emphasized as a means of helping students to gain a personal relationship with Jesus and apply the teaching of scripture in their lives.
  - c. Efforts will be made to encourage priests, deacons, religious, youth ministers, and other well-formed lay individuals to take an active part in school formation activities.
- 6.3 Schools will offer students regular engaging opportunities for prayer, retreats, and liturgy. These opportunities should be unique from those that exist within Religious Education programs.
- 6.4 There will be a culture of service in every grade level in every school that is discipleship oriented and deepens students' understanding of Jesus and the mission of the Catholic church.
- 6.5 Catholic schools and religious education programs should come together regularly for sacraments, service and social awareness endeavors.

## II. GOVERNANCE AND LEADERSHIP

### A. BOARDS AND COUNCILS

#### Priority/Goal

- 1. Boards and councils will be actively engaged with forming strategic plans and overseeing implementation of the plan, including monitoring and updating the plan. Decision making by the board and administration will be strategic and justified in the context of the plan.**

#### *Strategies and steps*

- 1.1 All Catholic schools will have a comprehensive, multi-year strategic plan that is aligned with the diocesan strategic plan. The Office of Catholic Schools will provide a template and set standards for a quality plan. The Office of Catholic Schools will outline expectations for a quality planning process. School plans will be designed to complement the accreditation process.
  - 1.2 Schools will have the option to complete their strategic plan on their own, request assistance from the Office of Catholic Schools, or engage consultants to assist them. Each school will select the approach that best fits them. The Office of Catholic Schools will check in with schools while they are developing their plans to see they are on track with expectations for a quality plan.
  - 1.3 The annual accreditation update will be expanded with an addendum that reports progress with implementation of the schools' local strategic plan. The accreditation process will have a supplement requiring the school have a strategic plan that meets diocesan standards.
  - 1.4 In-services for administrators, pastors, boards and councils will include expectations for a strategic plan supported by a quality strategic planning process.
- 2. Boards and councils should understand their role and, in particular, their role in furthering the advancement goals of the school in harmony with the larger stewardship goals of the parish(es).**

#### *Strategies and steps*

- 2.1 Board members will be in-serviced on their role and provided with a job description.
- 2.2 Each board member should be educated on and fully understand the functions of a board in the areas of Catholic identity, planning, policy making, administrator/principal selection and evaluation, finances/budgeting, and communications/marketing.
- 2.3 Selection of board members will take into account advancement objectives for the school.
- 2.4 In-service for boards and councils, presidents and principals, and pastors will address their role in advancement and how it can be an extension of stewardship in the wider church.
- 2.5 School boards and councils will have a standing group/committee dedicated to school advancement. The Office of Catholic Schools will provide several models for committees that lead and support advancement.

**3. In school systems, the respective role of the board of directors and the board of trustees should be reviewed and further clarified for more effective governance.**

*Strategies and steps*

- 3.1 Boards of trustees will be given definitive areas where they have specified jurisdiction. These areas will be recommended by the Office of Catholic Schools. The board of directors will approve the areas delegated to the board of trustees. As a result, there will be greater clarification of roles.
- 3.2 A permanent standing committee of the board of trustees should be a membership/nominations committee that will actively recruit and screen new members throughout the year and orient them when selected. Membership criteria will be developed using a matrix model that seeks a balance of talents and skills with representation. The Office of Catholic Schools will recommend the criteria and model to be used for selection.
- 3.3 The number of members on the board of directors will be reviewed for each system with the Office of Catholic Schools making recommendations where adjustments may be needed. This is particularly a concern when larger numbers of parishes comprise a system.

**4. Boards and councils will be effective and prove themselves valuable to furthering the mission of Catholic schools.**

*Strategies and steps*

- 4.1 Boards and councils will all follow an annual cycle of education. The Office of Catholic Schools will provide options and establish expectations. In-service will be designed to meet the needs of new councils and mature councils.
- 4.2 In-service and documentation will make clear the role of boards and councils, the role of principals and presidents, and the role of pastors. Some differentiation is needed for parish schools versus system schools.
- 4.3 Presidents, principals, pastors and key members of school administration will participate in in-service about the proper role of boards and councils, their value to the school, and how to most effectively work together.
- 4.4 Boards and councils will conduct a self-evaluation annually using a tool developed by the Office of Catholic Schools.
- 4.5 Recruitment and orientation of new members will be an activity of a standing committee of every board and council. Criteria for membership will be prescribed by the Office of Catholic Schools and then adopted by each school.
- 4.6 The Office of Catholic Schools will monitor that all boards and councils meet expectations, follow a plan to meet the basic requirements of a functional board, and follow recommended practices regarding member selection and orientation.

## B. PRESIDENTS AND PRINCIPALS

### Priority/Goal

#### 5. Provide for an ongoing program of leadership development for principals and presidents.

##### *Strategies and steps*

- 5.1 A needs assessment of potential topics of interest to administrators will be conducted.
- 5.2 The Office of Catholic Schools will determine additional areas of training that will benefit administrators. Examples of additional areas include updates to school law, working with boards, and focus on making schools of discipleship.
- 5.3 Partnerships with Catholic universities will be explored to create a leadership program for administrators that offers best practices and is authentically Catholic.

#### 6. Create an intentional system to cultivate and recruit talented principals and presidents for the future.

##### *Strategies and steps*

- 6.1 School leaders will be asked to provide the Office of Catholic Schools with names of promising teachers who might become excellent principals. These teachers will be given opportunities to serve on diocesan committees in support of the strategic plan or curriculum enhancement, thus allowing the potential administrator to become exposed to diocesan processes and the Office of Catholic Schools the opportunity to assess their competencies.

#### 7. A process for professional evaluation will be in place for all presidents of systems and all principals of parish schools. Current processes will be reviewed and updated to align with the goals of the strategic plan.

##### *Strategies and steps*

- 7.1 The Office of Catholic Schools will review and update the evaluation tool for all principals in parish schools. The Office of Catholic Schools will assist pastors with regards to evaluating school leadership.
- 7.2 The Office of Catholic Schools will act on behalf of the board of directors in school systems to facilitate the evaluation process of the system president. The board of directors will receive the evaluation. The Office of Catholic Schools will consult with presidents, principals, pastors, and key members of boards of directors and boards of trustees in developing the tool.
- 7.3 Evaluations will be done annually.
- 7.4 Evaluations will include measures of progress toward developing and implementing a school strategic plan.

- 8. All schools and systems need to be adequately staffed at the administrative level to accomplish all that is required to be successful. Funding and planning are necessary to accomplish this goal.**

*Strategies and steps*

- 8.1 Strategic plans for each school will include a staffing plan for administration and support staff. Staffing will grow where needed to give principals and presidents the support they need to fulfill all their leadership responsibilities. For most schools, this means an increase in administration and an increase in funding whether individually or collaboratively with other schools.

## **C. DIOCESAN LEADERSHIP AND OFFICE OF CATHOLIC SCHOOLS**

### **Priority/Goal**

- 9. Redefine the role of the Office of Catholic Schools and give the office the proper authority to lead implementation of the plan and expect schools and systems to act in accordance with the plan.**

*Strategies and steps*

- 9.1 Criteria for healthy schools will be established and communicated. Select criteria will be identified as essential and non-negotiable. A tool will be developed to capture and report the health of schools per the established criteria. All schools will be reviewed on a three-year rotating basis on a parallel track with accreditation.
- 9.2 If a school fails to meet the threshold of several essential criteria, the Office of Catholic Schools will intervene with an assessment and action plan worked out jointly with the school and local leadership. The Office of Catholic Schools will provide resources and guidance. The office will also monitor progress and make recommendations if further action is needed including changes to the status or organizational structure of the school.
- 10. Give the Office of Catholic Schools an appropriate role in the appointment of principals and presidents or releasing them from their positions to ensure that strong, effective, qualified leadership is in place.**

*Strategies and steps*

- 10.1 Refine and promulgate a formal process for the selection and appointment of principals that includes an appropriate role for the Office of Catholic Schools. Formalize diocesan policy so that only candidates preapproved by the Office of Catholic Schools will be offered principal and president positions. This includes principals within systems.
- 10.2 Before principals are released from their positions, the pastor or president and the superintendent will agree that dismissal is warranted, proper procedures have been followed, performance evaluations have been conducted, and dismissal is in the best interest of the school. Principals will not be terminated or non-renewed without agreement from the superintendent.

- 11. Provide the right number of staff with the right expertise in the Office of Catholic Schools in keeping with the new role of the office and the commitments to fully implement the strategic plan.**
- 12. Work as a functional team, and work with others in the diocesan offices through cross-functional teams. Build collaborative relationships.**

*Strategies and steps*

- 12.1 The Office of Catholic Schools will work with related functional teams to determine the basis for partnerships and enhanced collaboration. Collaboration will be particularly useful with finance/accounting, new evangelization, religious education, parish planning and pastoral services, Hispanic ministry, Catholic foundation, and human resources.

### III. ACADEMIC EXCELLENCE

#### Observations

- a. Academic excellence is a primary consideration for parents when choosing a school for their children. The hallmark of Catholic schools has always been an academically challenging program of study in an atmosphere that models gospel values and educates the whole child. Catholic schools in the Diocese of Green Bay generally offer strong programs, but there is variability in academic quality from school to school. There has been a focus on developing curriculum and providing schools with professional development in previous plans. However, not all schools attend this training, and the development of curriculum should be accelerated. All schools should have some accountability to the Office of Catholic Schools to ensure adherence to a common curriculum and academic quality.
- b. Test scores are an indicator of academic quality. While the diocesan-wide average appears strong compared to national norms, there is more variability from school to school and system to system, and there was some decline in math and language scores from aggregate fall 2015 to fall 2016. About half of the students made significant progress against their projected growth targets in math and reading.
- c. The testing and reporting system in place can help teachers develop individual and classroom goals and create appropriate lessons and teaching strategies for learners. The use of assessment data will be more effective if teachers take advantage of training offered by the diocese and use the data to enhance instruction.
- d. ACT scores in the Diocese of Green Bay Catholic high schools outpaced state averages by significant margins. In English, math, reading and science, there were significant improvements from previous years.
- e. Diocesan curriculum, standards and benchmarks are beneficial for schools. Creating these at the school level is redundant and results in inconsistent quality. The diocese needs the human resources to develop, disseminate, and update these on a timely basis.
- f. There is a need for greater articulation of curriculum across all grade levels, and in particular, from elementary to middle to high school. This is especially needed outside of school systems, but even within systems there is opportunity to improve PreK-12 programs.
- g. Technology is becoming more and more a part of student life. Some schools have done a very good job bringing in new technology and integrating technology with their approach to education, but some schools are lagging behind. It is advisable for every school to have a technology plan and update it on a regular basis.
- h. Several schools, particularly some of the system schools, have instituted strong robotics programs, STEM programs, and STREAM programs. There is opportunity and interest for wider and more in-depth STREAM programs.
- i. Some schools with small enrollment and budget constraints have not been providing educational programs like foreign language, music, physical education, technology, as well as resource teachers and guidance counselors. Ways need to be found to reinstate these disciplines and find the resources for all schools.
- j. Several schools have not kept textbooks updated and have not been purchasing new classroom resources. In these cases, the financial pressure to cut or hold expenses is cutting into the quality of the educational program and hampering new investment and improvement.
- k. Serving students with special learning needs has risen as a concern for many parents. Catholic schools

are limited in this area with some making excellent efforts to serve select students. The diocese has not coordinated a response to this need. There is opportunity to serve more students with creative programs, more professional development, new resources, and the possibility of specially designed programs in select schools.

- l. Professional development is underfunded for almost all schools. While new teachers come with more current training, seasoned teachers are not returning to school or getting the training they need to meet the expectations for a 21st century education. Professional development is needed in these areas: using data to inform instruction, differentiated instruction, use of instructional methods like project-based learning, multi-age classrooms, flipped and flexible classrooms, good literacy and math programs, integrated technology and special needs.
- m. Salaries and compensation are starting to impact recruitment and retention of quality teachers. For many years, teachers have worked at a discounted level of compensation to their profession in Catholic schools. The difference is reaching a level where newer teachers are not willing or able to remain at Catholic schools long term. In some cases, teachers come to teach in Catholic schools after graduation, then use the experience to take better jobs with higher pay a few years later. Schools lose great teachers.
- n. In the State of Wisconsin there is a projected teacher and administrator shortage over the next five to ten years in public schools. This shortage will impact Catholic schools and their ability to recruit and retain highly qualified teachers and administrators.
- o. PowerSchool has many potential advantages for schools and the diocese. Due to problems with the implementation of the program into the schools, the benefits have not been fully realized. A review is needed of PowerSchool and how it can best support the needs of both the diocese and the schools.
- p. Partnerships with universities have been formed, with the greatest success being CatholicLink in Green Bay. More opportunities should be explored, especially where Catholic universities are present.

## A. COMMON STANDARDS AND CURRICULUM

### Priority/Goal

#### 1. The Office of Catholic Schools will provide leadership in the development of curriculum, with standards and benchmarks for all disciplines.

##### *Strategies and steps*

- 1.1 The Office of Catholic Schools will lead the effort to ensure that curriculum and common standards for each discipline are available to schools, including high schools.
  - a. The diocese will continue to refine its systematic plan for developing curriculum utilizing a five-year cycle for reviewing and upgrading curriculum. Each discipline upgrade will be accomplished in a single school year, so that the curriculum can be adopted before the upcoming school year.
  - b. Internal curriculum teams of exceptional teachers will be established for each discipline. Members will be recommended by principals and may be invited from local universities. The committee will review each discipline and determine upgrades. Curriculum of other dioceses and the public sector will be consulted in the process of building and upgrading curriculum. Community leaders will be consulted and their feedback used in shaping a curriculum that serves the needs of the community.
  - c. Standards and benchmarks and scope and sequence tracking instruments will be available for all

subject areas and grade levels.

- d. Sample lesson plans will be developed to showcase effective and innovative, instructional strategies including use of technology.
- 1.2 Clear strands will be in place to ensure that elements of the new evangelization in the Catholic faith, moral human interaction, and technology are embedded into each discipline. Pastors, lay ecclesial ministers, technology experts, and guidance counselors will be consulted when developing these strands.
  - 1.3 In light of the diocesan emphasis on the new evangelization and the secular society in which students live, attention will be placed on re-examining the religion curriculum to ensure that formation is truly dynamic and students are prepared to become life-long missionary disciples.
  - 1.4 A process for vetting, promulgation, and distribution of revised curriculum will be determined and in place to ensure the timely dissemination of updated curriculum for the schools.
    - a. Delivery systems, including the diocesan website, will be in place to facilitate access to updated curriculum for all schools.
- 2. Schools will engage in a continuous process of evaluation and improvement to ensure that all standards and benchmarks are met within the accreditation process.**

*Strategies and steps*

- 2.1 The Office of Catholic Schools will continue to ensure that the standards are aligned with the curriculum and standardized assessments.
- 2.2 The Office of Catholic Schools will review each school's assessment data and assist schools by providing strategies, training, and measures of accountability.
- 2.3 Schools will collect and analyze student performance data as a means of improving instruction.
- 2.4 A diocesan goal of schools scoring in the top 15th percentile or above on nationally normed assessments will be in place. Schools with consistently higher scores will be encouraged to seek opportunities for further growth.
- 2.5 All elementary schools will develop and execute strategies to ensure that more than 60% of their students reach their growth targets, including underperformers and top performers.
- 2.6 High schools will include elements in their curriculum that emphasize the testing elements of the ACT and SAT standardized tests.
- 2.7 The Office of Catholic Schools will create a school profile for elementary and high schools that includes test scores and other benchmarks.
- 2.8 Each school will create a school profile that meets the expectation of the diocesan plan.

**3. With the leadership of the Office of Catholic Schools, schools will focus on teaching and learning that is authentically Catholic and academically excellent.**

*Strategies and steps*

- 3.1 The Office of Catholic Schools will develop a needs assessment and yearly plan for staff development based upon identified needs.
- 3.2 The Office of Catholic Schools will offer diocesan-wide and regional training on research-based instructional strategies based on schools' needs.
  - a. Diocesan-wide workshops will be established to leverage the success of individual schools or systems that effectively meet the needs of students.
  - b. Models for replication in schools and classrooms will be showcased.
- 3.3 Teachers will impart 21st century skills with strategies that respect learning styles, incorporate higher order thinking skills, and provide effective differentiated instruction.
- 3.4 The Office of Catholic Schools will have the authority to require that all schools have a professional development plan, that all school staff attend professional development opportunities, and to ensure that the training is incorporated into instruction at the school level based on individual school needs. The Office of Catholic Schools will require that all teachers receive training on prescribed professional development topics determined by the Office of Catholic Schools as well as those topics each school determines best meet their needs. Schools will report their professional development plans to the Office of Catholic Schools.
- 3.5 The Office of Catholic Schools and individual schools will research and replicate, as appropriate, exemplary programs. Schools must be aware of innovative, sought-after programs offered elsewhere that provide direct or indirect competition. With direction from the Office of Catholic Schools, fresh, new programs must be incorporated to keep academic programming current.
- 3.6 The Office of Catholic Schools will assist small non-system schools in determining a plan to provide services of credentialed teachers of art, music, physical education, languages, reading, and other academic disciplines that are currently lacking due to budget constraints, as well as qualified specialists like resource teachers, guidance counselors, and technology support staff.

## B. PREPARATION FOR POST-HIGH SCHOOL

### Priority/Goal

#### 4. Schools will develop resources and activities to ensure student readiness for the world ahead.

##### *Strategies and steps*

- 4.1 Schools' spiritual, moral and academic footings will ensure an exceptional transition from high school to college or the work place, and will expand possibilities including mentorships, on-site training, or career development.
- 4.2 Schools will develop professional partnerships with local businesses, educational leaders, community organizations, and colleges to determine the cutting-edge needs of the marketplace to ensure that students are well-prepared. Every school will have at least one partnership and set goals for the number and type of partnership they will develop.
- 4.3 Schools will develop programs and course offerings that anticipate the upcoming job market. They will build on programs already in place and may look to developing an emphasis on certain trades, or new programming.
- 4.4 The thought of creating a Catholic vocational training school will be explored.
- 4.5 The Office of Catholic Schools, in consultation with principals and presidents, will develop a profile of the Catholic school student at graduation, appropriate for each school's terminal year.

## C. TECHNOLOGY AS A TOOL

### Priority/Goal

#### 5. Ensure that each school has a workable technology plan.

##### *Strategies and steps*

- 5.1 A position in the Office of Catholic Schools will be responsible for ensuring that technology is integrated into the academic program in all schools.
- 5.2 The diocese will continue to utilize the technology steering committee in place to assist schools to develop workable goals for both teachers and students.
  - a. The Office of Catholic Schools will utilize ISTE technology standards in the development of a technology plan, and identify acceptable minimum standards of use for teachers and students, and measurable goals.
  - b. The Office of Catholic School's technology committee will disseminate these standards, and teachers will incorporate them as part of a goal-setting process for professional growth.
- 5.3 Schools will conduct a self-assessment with the guidance of a tool developed by the Office of Catholic Schools to gain an accurate inventory of hardware, band-width, software, and instructional support needs. The result of the self-assessment will be shared with the Office of Catholic Schools to be used for technology planning and support at the diocesan level.
- 5.4 The Office of Catholic Schools will develop relationships with the tech community to learn what the competition in the public sector is offering and the latest industry trends.
- 5.5 The Office of Catholic Schools will work with schools and systems to develop a set of prioritized

goals, objectives and action plans with detailed costs, leading to a technology plan.

- 5.6 The Office of Catholic Schools will lead the search for funding streams through grants, business partnerships, or development efforts to grow technology use in the schools, particularly schools in which there is a need.
- 5.7 The Office of Catholic Schools will offer resources and/or professional development opportunities in which exemplary schools can showcase best practices and innovative technology programming for other schools.
- 5.8 Distance learning pilots and online opportunities will be explored to provide students with additional course options.

## D. NEW EDUCATIONAL MODELS

### Observation

The diocese has a number of very small schools located in areas where there are few or no other Catholic school options. These schools often have long histories of serving the local population, but now find that as industry has moved out, and the population is diminishing, that it is challenging to keep these schools open or to offer full programs of study. Alternatives to traditional schools will be researched including the possibility of virtual schools.

### Priority/Goal

#### **6. Seek opportunities and strategies to serve families who desire a Catholic education in areas with resource challenges.**

##### *Strategies and steps*

- 6.1 The Office of Catholic Schools will administer a collaborative association of non-system schools to make sure that standards of quality and necessary resources are available. Schools in each region will form professional learning communities with assistance from the Office of Catholic Schools. Two or more schools in each region will be encouraged to meet regularly to plan and work together by sharing ideas and best practices. This sharing will include programs and resources.
- 6.2 Schools with small enrollments or fiscal challenges will research the possibility of using electronic media including distance learning, programs like WINGS, or home school models which use Catholic online courses, to provide students with a Catholic education option.
- 6.3 In order to ensure high standards of academic excellence, alternate models of education including blended learning and flipped and mixed classrooms, will be researched and employed. The Office of Catholic Schools will have authority to determine if the programs are effective delivery systems.
- 6.4 All schools will have updated technology and updated resources, including small non-system schools.
- 6.5 Schools will submit annually to the Office of Catholic Schools an inventory of textbooks and other primary resources.
- 6.6 The Office of Catholic Schools will develop a database of preferred vendors with the intent to generate opportunities for group purchasing.

## E. PROGRAMS FOR STUDENTS WITH A RANGE OF LEARNING ABILITIES

### Observation

Catholic schools, with their emphasis on moral values and an orderly, intimate atmosphere, can be an ideal place for exceptional students. Schools are often reticent to add this population to their numbers, because many of the teachers lack training in this area, and because of the lack of resources to build an effective program. Steps can be taken to begin to welcome this population incrementally.

### Priority/Goal

#### 7. Schools will serve a variety of populations.

##### *Strategies and steps*

- 7.1 The Office of Catholic Schools will establish a team of administrators and teachers with the task of formulating guidelines for working with exceptional students. Training on this guidance will be provided to all schools.
  - a. Schools will embrace the challenge of serving exceptional students according to the needs of the students and the resources available in each school.
  - b. Schools will develop strategies to welcome and serve the growing number of the Hispanic community.
  - c. Schools will review assessment data from students' records and determine accommodations or acceleration plans for students.
  - d. All schools will develop student services teams to offer support for teachers in developing individualized learning plans.
- 7.2 Schools will hire resource teachers to ensure that programs serving learning disabilities, exceptional students, and second language students are effective.
- 7.3 Schools will add new resources and avail themselves of professional development as needed to support student needs.
- 7.4 All students will have access to distance learning or online courses for classes not offered at their school.
- 7.5 Schools will offer differentiated literacy and math programs.
- 7.6 The Office of Catholic Schools will develop a database of faculty and staff that have additional certifications to create a depository for schools to share resources.

## IV. OPERATIONAL VITALITY

### A. ENROLLMENT MANAGEMENT

Catholic schools must effectively communicate their value and excellence through their unique brand to attract enrollment, build donor support, strengthen parish support, make the case for tuition, enhance morale, recruit teachers, and a host of related reasons. A comprehensive marketing plan at the diocesan and local levels working toward common goals will make this possible. The brand and message need to be articulated by all levels of the school community including administration (both school and parish), boards, faculty and staff.

The Diocese of Green Bay has been proactive by engaging the services of O'Connor Connective which in April, 2016 submitted recommendations to support long-term enrollment growth for rural schools. The recommendations were based on their visits to 13 rural schools. Not all schools participated, but those that did reported the initiative had a positive impact on awareness and enrollment.

The diocese and the schools therein need to build upon the work already begun. While marketing efforts by themselves will not increase enrollment, strategic promotion of strengths and uniqueness of each school will generate more attention from families looking for non-public school alternatives.

#### Observations

- a. There was a 16% decrease in PreK to 12 enrollment across the diocese between 2011-12 and 2017-18, a loss of 1,694 students.
- b. Sixteen school sites had stable or increased PreK-12 enrollment between 2011-12 and 2017-18.
- c. Thirty-nine school sites had a declining PreK-12 enrollment trend between 2011-12 and 2017-18. Seventeen of these sites had a shift in their trend with stable or increased enrollment between 2016-17 and 2017-18.
- d. In most of the schools, marketing efforts focus primarily on student recruitment. A limited number of schools have a written comprehensive plan for marketing and public relations. Most marketing/recruitment efforts include an open house, ads in local publications and newspapers, and development of school websites.
- e. Capacity is a key element in looking at the potential for growth or expansion of a school. In general, as school enrollment approaches or exceeds 90% of its capacity, it can be considered at or near capacity. While there were 3,318 empty elementary school seats for grades K to 8 in 2016-17, enrollment capacity overall in the diocese for elementary schools was 64%.
- f. The most common reasons given by school leadership and pastors for enrollment loss are:
  - Classes too small
  - Not enough specials/offerings/special needs
  - Demographic make-up of communities (i.e. aging populations)
  - Strong public schools (more competitive, more attractive)
  - Limited grades
  - Better/newer public facilities
  - Athletic programs not attractive, schools can't increase tuition (parents will leave)

- Tuition/finances (lack of perceived value)
  - Uncertainty about curriculum standards
  - Impact of consolidations
- g. Marketing and recruitment activities are currently the responsibility of each local school or system. These recruitment efforts vary widely, and in general do not always receive the investment of human and financial resources needed to build or maintain sufficient enrollment.
- h. Marketing and recruitment efforts require a comprehensive approach at the diocesan, regional and local school levels. These efforts must focus on developing and projecting a strong image, attracting increased student enrollment, and attracting and cultivating new donors for every school.

## Priority/Goal

### 1. Increase enrollment at all Catholic schools through marketing efforts at both the local school level and the diocesan level. Operate schools at minimally 80% and optimally 90% or better of their planned enrollment capacity.

#### *Strategies and steps*

- 1.1 The Office of Catholic Schools will provide leadership and expertise that assists local Catholic schools to build their marketing programs based on the diocesan branding initiative.
- a. As a result of reorganization, both human and financial resources for marketing support will be identified within the Office of Catholic Schools.
  - b. Schools will be provided with resources from the National Catholic Educational Association (NCEA), Notre Dame University and other local and national consultative organizations. These resources will include seminars, webinars, presentations, templates and other tools that will help schools build and enhance their individual marketing programs.
  - c. Consistent marketing in-service will be conducted by the Office of Catholic Schools with expected attendance by local school personnel.
  - d. Marketing in-service for schools will be conducted regularly as part of a Catholic school summit for principals, pastors, school staff, and board members.
  - e. Purposeful quarterly gatherings of marketing and admissions representatives would be of benefit to schools and allow them to network and share ideas.
  - f. All schools whether individually, as part of a school system, or as part of a group of schools will identify a person on staff or add a staff position, full-time or part-time, to support and lead marketing and recruitment efforts. Only in special circumstances would an unpaid volunteer be acceptable. The Office of Catholic Schools will create a job description and a training program for this position.
- 1.2 The Diocese of Green Bay will undertake a diocesan marketing campaign to establish a brand and promote it, communicate the importance of Catholic education, define the value of Catholic schools and showcase the outcomes.
- a. Identify a funding source for a major marketing initiative. Possibilities to consider are: diocesan development initiative for Catholic schools, assessment from schools, regular campaigns, larger diocesan budget for schools.
  - b. Establish messaging and strategy for each of these various platforms: web, social media, print

and the diocesan newspaper *The Compass*.

- c. Develop specific strategies as a resource for local schools to help their recruitment with early childhood and retention after preschool.
  - d. Develop strategies for effective use of the Office of Catholic Schools' website and other media with regular review and updates.
  - e. Use the knowledge of the diocesan Department of Communications for marketing efforts at the diocesan, regional and local school levels.
  - f. The Office of Catholic Schools will have a full-time person focusing on marketing efforts at the diocesan, regional and local levels.
- 1.3 Each school will develop and implement a marketing and recruitment program. Focus will be to increase enrollment to 80% of planned capacity or higher, and ideally 90%.
- a. Every school will develop a marketing plan based on a template provided by the Office of Catholic Schools.
  - b. The plan will be reviewed by the Office of Catholic Schools.
  - c. Feedback will be provided as well as consultation with school staff and committee members charged with marketing.
  - d. The local school budget will include a line item to fund marketing initiatives.
  - e. Individual school plans will include a local marketing committee and a written plan of goals and actions. Plans should include:
    - Established clarity of school mission which incorporates the diocesan mission of evangelization and discipleship
    - Creation of an Enrollment Team
    - Timeline for capacity improvement
  - f. Each local school board and/or a marketing committee of the board will have the mandate to develop, implement and evaluate a marketing program at its school.
  - g. All members of the local school community will recognize and fulfill their roles in building a positive image of the school to recruit and retain enrollment. A program of personal invitations or word-of-mouth marketing will be formalized in each school.
  - h. Parents will be identified, invited and trained to serve as ambassadors for the school. These ambassadors will be actively involved in ensuring the success of the school's marketing and recruitment efforts.
  - i. Customer service training and an assessment tool such as a "secret shopper" program will be provided to all school personnel to increase awareness of their respective roles in marketing the school and sharing best practices regarding communications and interactions with the public.
  - j. The availability of tuition assistance will be an important part of a recruitment campaign. The means of communicating cost and value of a Catholic education will be repackaged and the way tuition assistance is distributed will be rethought to align tuition assistance with enrollment goals.
  - k. Each elementary school, high school, and system will have a written and well-defined enrollment and student retention plan as part of its overall strategic planning process.

- l. Schools will utilize an enrollment projection tool based on the comprehensive data of the strategic plan.
- m. Each school will develop enrollment or market share goals based on the available data.
- n. Action plans will be designed to establish connections with Catholic families whose children are not yet of school age and with area preschool programs.
- o. Each school will research the potential expansion of the before and after-school programs. These programs are a service to parish families whose children are not enrolled in a Catholic school to enhance the school's marketability and positive image in the parish community.
- p. Schools will measure and market the success of their academic programs by sharing graduation rates, student success in high school or college, appropriate aspects of school test scores, etc.
- q. All parishes in the diocese will promote Catholic school education and provide a supportive environment for the schools.

**2. Improve retention rates at every Catholic school to maintain and increase enrollment.**

*Strategies and steps*

- 2.1 A satisfaction survey instrument and process will be developed by the Office of Catholic Schools.
  - a. Each school will implement the tool prior to registration to measure parent (or other school constituencies) attitudes, perceptions and expectations as a means of internally evaluating school performance, areas of strength, and challenges or areas for potential change.
  - b. A summary report of survey results will be prepared and shared with the Office of Catholic Schools and the school community.
  - c. Based on survey results, strategies will be developed to enhance the overall school experience with the goal of improving the retention of students from PreK to 12th grade.
- 2.2 The Office of Catholic Schools will develop an exit interview process and instrument for all schools to implement to track their attrition rate and reasons why students and families leave.
  - a. Results will be tabulated and shared at both the diocesan and local level.
  - b. Based on feedback, action plans and strategies will be created to improve retention on a school-by-school basis.
- 2.3 Each school will create an Enrollment Team that has the responsibility to communicate to school leadership the issues and concerns of students and parents.
  - a. The Enrollment Team is comprised of teachers and staff who interact with students and parents on a regular basis.
  - b. The team should be trained on what their role is and how important they are to increasing retention.
  - c. The team will meet on a regular basis to ensure that issues that arise are addressed in a timely manner and minimize dissatisfaction.

**Observations on the Wisconsin Parental Choice Program (WPCP)**

- a. The WPCP is in its fifth year in the geographic region that includes the Diocese of Green Bay.

- b. For the 2016-17 year, the percentage equals 1% of a public school district's enrollment. In 2017-18 the percentage will increase to 2%.
- c. This percentage will increase each year by 1% until it caps at a set percentage. Currently the projected cap is 10%, but that figure could change based on legislation.
- d. The voucher amount for 2016-17 is \$7,323 for grades K-8 and \$7,969 for grades 9-12.
- e. For schools participating in the WPCP program, revenue generated represents 6% to 34% of their total income.
- f. Families are eligible to apply for WPCP if they qualify for free/reduced lunch (\$44,955 for a family of 4 and \$51,955 for a family of 4 parents/legal guardians married in 2016-17).
- g. During school visits, it was noted that some early WPCP students were already enrolled or committed to attend a Catholic school.
- h. Some parents chose Catholic school for their children strictly because of the financial assistance provided by the WPCP program.
- i. Since 2013-14, the number of WPCP students has increased. For the 2016-17 school year 8% of the total diocesan K-12 enrollment are part of the program.
- j. There is resistance to WPCP at several schools because of the concern that the school culture will change if there is a higher percentage of participating students enrolled.
- k. Several schools within the diocese are exploring the WPCP option as a method to increase enrollment.
- l. Within the Southeast region, several schools are working in collaboration to launch WPCP for the 2017-18 school year.
- m. The diocese may need to play an important role with schools who want to get involved with the program and provide support as needed.

**3. Determine how to embrace Wisconsin Parental Choice Program and how it will impact enrollment and schools for the future.**

*Strategies and steps*

- 3.1 As part of the Office of Catholic Schools' reorganization and the need to increase enrollment, human resources will be dedicated to introduce and implement the program across the diocese.
  - a. Personnel assigned will be educated and trained on all components of WPCP.
  - b. Personnel assigned will become the primary contact for the diocese with program staff.

- 3.2 Updated data will be gathered from participating schools and a case for participation will be written.
  - a. The Office of Catholic Schools will collect most recent data from participating schools and generate documentation that will be shared with non-participating schools.
- 3.3 Catholic schools in the diocese that are currently not participating in WPCP will be educated on the value of the program.
  - a. Representatives from WPCP will conduct regional updated in-services to share how the program works.
  - b. Schools that currently have students enrolled in the program will participate and share their experiences.
  - c. Attendance will be mandatory for schools that do not currently have students enrolled through the program.
- 3.4 The diocese will become a more vocal supporter at the state level to expand WPCP and share the positive impact the program has on students.

## B. FACILITIES

### Observations

- a. Today, more so than in the past, parents are shopping for schools and they have choices. First impressions and appearance are a factor when choosing a school.
- b. Across Catholic schools in the Diocese of Green Bay there are approximately 557 classrooms, 246 special rooms for music, art, science, library, computer, band, etc., and 44 gymnasiums.
- c. The majority of schools visited were clean and well maintained. The newest building in the diocese is St. Mary Catholic Middle School in Neenah, built in 2015. The average age of elementary schools is 61 years (1956) and the average age for a high school building is 48 years (1969). School buildings range in age from the early 1900's to 2000, with the majority being built in the 1950's and 1960's.
- d. Nationally, public schools spend hundreds of millions on new schools, renovations and upgrades every year. Catholic schools historically spend relatively little.
- e. Few schools have a master facilities plan that looks beyond maintenance issues. Most are operating by taking care of repairs and maintenance year to year, or in some cases, month to month. Some schools have safety issues stemming from the fact that the parish and school share space, and buildings were designed long before safety was a major concern. The diocesan Office of Facilities and Properties will be a resource in developing a template for a master facility plan to address future needs, repairs such as boilers and air conditioning needs.
- f. Schools are slow to embrace the facility needs for a 21st century education in a competitive marketplace. Education has changed dramatically in the last 20 years, requiring more space for independent learning, flexible seating to accomplish group work, and emphasis on STEM which requires space for science labs, robotics, as well as an emphasis on athletics and fine and performing arts.
- g. When visiting schools, the consultants found many cases where it was difficult to locate the main entrance to a school. Smart and attractive signage, and the branding that should accompany it, will set a welcoming tone to first-time visitors.
- h. Some schools are state-of-the-art while other schools are more aged which can be a deterrent to discerning parents. Many schools have not updated the use of space, technology or furnishings to accommodate best practices.
- i. Lourdes Academy is at a critical juncture with regards to facilities. A new elementary school facility will need to be added on the central campus within the next two years to maintain and expand enrollment at the high school.

## Priority/Goal

### 4. Upgrade facilities and redesign schools to support 21st century education.

#### *Strategies and steps*

- 4.1 The Office of Catholic Schools will establish a committee to develop the environmental standards to support the level of quality expected in a Catholic school in the Diocese of Green Bay that include:
  - a. Building utilization
  - b. Design and furnishings in educational spaces
  - c. Technology infrastructure
  - d. Marketability
- 4.2 Each learning environment should contain:
  - a. A flexible layout that supports collaboration and conforms to needs of parish programs
  - b. Furniture for utility
  - c. Technology integration
  - d. A light-filled environment
- 4.3 Standards should be translated into a self-assessment for each school to complete and return to the Office of Catholic Schools.

### 5. Every school should have a master facility plan regardless of the most recent capital project or the age of the facility.

#### *Strategies and steps*

- 5.1 Conduct an evaluation of adequacies and deficiencies of each school campus to support a quality educational program, both academic and co-curricular.
  - a. Work with the Office of Facilities and Properties or retain the expertise of an architectural/engineering firm to generate a systematic and reliable assessment.
  - b. Evaluation should include the limitations and advantages of each school campus for supporting future programming.
  - c. Identify any safety or health concerns.
- 5.2 Prepare a master plan for each school that supports identified needs for the future.
  - a. Identify physical elements needed for the plan; for example, a new gym or an expanded cafeteria or additional classrooms.
  - b. Provide a cost estimate of capital items to address any deferred maintenance or anticipated improvements that would be considered a capital expenditure and outside the normal operating budget. Capital projects could be prioritized into essential for safety and functionality, necessary but not immediate, and desirable for the long term.
  - c. Determine funding resources to support identified needs.

### 6. Clarify the relationship between parishes with school facilities, and parishes hosting a school program that uses them. Find a way to incentivize investment in school facilities, even when

**facilities do not belong to the school.**

***Strategies and steps***

- 6.1 Parishes that have a school attached should make a concerted effort to show commitment to maintaining and improving facilities.
- a. The pastor, principal and advisory board will maintain an understanding that facilities are to be used by both the parish and the school.
  - b. The parish will establish or enhance a building and grounds or facilities committee to address facility use, maintenance, short and long-term capital needs for parish and school.
  - c. In a collaborative effort of the parish and school, create a long-range facility plan addressing parish ministry and school needs.
  - d. Create the process(es) through the facilities committee on how schools will collaborate with their parishes to plan facility upgrades, expansions, and any major capital projects. Create incentives and options for schools to support funding for capital improvements to parish buildings.
  - e. School operating budgets will include line items for routine and deferred maintenance.
  - f. When facilities are shared, there should be a respectful relationship established with regards to use.
- 6.2 A parish that supports a school program onsite, but does not oversee the school operation, will in collaboration with system leadership develop a clearly defined and written facility use and lease agreement with the school system.
- a. Agreements should be reviewed every three years and sooner if issues arise. Agreements need to address:
    - Annual/monthly lease amount;
    - Expectations and parameters regarding the access to, scheduling and use of parish facilities and property;
    - Expectations and responsibilities of parish and school in regards to routine and deferred maintenance, insurance, and all matters related to upkeep;
    - How school systems will collaborate with host parishes to plan and budget for facility upgrades, expansions, and any major capital projects;
    - Creating incentives and options for school systems to help fund capital improvements to parish buildings and then have reasonable access to and control for those facilities;
    - Developing a facility plan to be put in place and be supportive of the long-range strategic plan of the school system while also being mindful of and serving long-range parish needs. This should be a cooperative effort between the host parish and school system.

## C. COLLABORATION AND CONSORTIA

### Observations

In many regions across the diocese, financial resources are not available to support the many needs of the schools. This is the case in many of the smaller, rural schools where enrollment is low and funding is not available for co-curriculars such as Spanish, art, music and in some cases technology.

In the Southeast region, a pilot program was rolled out and has seen limited success mostly due to leadership, communication and funding. There are lessons to be taken from the pilot program and rolled into an improved opportunity for sustainability.

### Priority/Goal

#### **7. Seek opportunities for collaboration among all systems and non-system schools to strengthen the viability for Catholic education across the diocese.**

##### *Strategies and steps*

- 7.1 The Office of Catholic Schools will provide leadership to create a consortia of non-system schools in areas where natural groupings exist.
  - a. The authority to coordinate and guide the consortia needs to be vested in a designated person. All parties must agree to their role and breadth of oversight. The Office of Catholic Schools could provide staff resources to coordinate and oversee certain consortia.
  - b. The parishes involved will form an agreement that includes a formula for funding consortia activities for a period of time. The diocese will help to facilitate the administration of finances for the consortia. The diocese will bring accountability to follow through with agreements.
  - c. With guidance from the Office of Catholic Schools, schools in each region will form professional learning communities in which two or more schools meet regularly to plan and work together by sharing ideas and best practices. This sharing will include programs and resources.
- 7.2 The Office of Catholic Schools will assist smaller non-system schools in determining a plan to provide services of credentialed teachers of art, music, physical education, languages, reading, and other academic disciplines that are currently lacking due to budget constraints, as well as qualified specialists like resource teachers, guidance counselors, and technology support staff.
  - a. The Office of Catholic Schools will provide oversight for these programs and support schools with implementation.
  - b. The funding model will be evaluated and a determination made of how to fund going forward in order for the program to be self-sustaining.
- 7.3 The Office of Catholic Schools will work with systems to identify where collaboration between systems or with non-system schools can be mutually beneficial.

## D. FINANCIAL VIABILITY

### Observations

- a. Financial viability is achieved when there is a reliable revenue stream that generates sufficient resources to pay for the expenses associated with the desired program for the school. Expenses are understood to be those costs associated with the delivery of a quality education that can achieve the goals and vision of a healthy and excellent Catholic school. Reliable revenue is understood to be income that is sustainable year after year drawing from a combination of sources with the potential to grow income as needs grow.
- b. Expenses are most impacted by class size, staffing, and teacher compensation. The question is whether expenses are too high or not high enough; and for Catholic schools in the Diocese of Green Bay, one or both are true of almost every school. When class size declines and pupil teacher ratios drop, the cost per pupil is pushed up beyond what it should be. By contrast, expenses may not be high enough when teachers are not paid at a competitive level in keeping with the profession and cost of living or operating budgets are starved to balance budgets and resources or “extra” things are put off.
- c. Having a strategic plan and strategic vision necessitates a revenue model that can sustain improvement and growth. **Reliance on traditional revenue sources and historical thinking are choking the potential for more resources.** For many schools, the operating budgets and capital budgets do not fund educational programs at the level necessary or desired to meet the expectations of a truly healthy school. Most schools budget for what they can afford, not for what they need and desire. Areas where spending is often lacking are: professional development, teacher compensation, marketing and communications, support services for students, and facilities upgrades. **The most successful Catholic schools are those that make the case for their value to parents and to the donor community, and then continually make smart investments that enriches that value.**
- d. What would the cost of education look like if a school did reflect in their budget the costs associated with their strategic plan? What if teacher compensation were competitive? What resources would benefit students? Schools need to look at their services, programs, facilities, and technologies to truly deliver the value and quality advertised. Not only do schools struggle to fully fund the education programming, but many are too lean within their administration to be capable in areas like public relations, marketing, fundraising, volunteer engagement, and community outreach.

The major sources of income are tuition, parish subsidy, and fundraising. Each one will be presented with recommendations to follow.

SOURCE	PERCENT OF REVENUE	COMMON MINDSET
Tuition	44.8% for system schools and 27.0% for non-system schools	“if we raise tuition, we will lose enrollment” “schools are expensive” “parents do not enroll because of cost” “parents are losing jobs and not employed”

**Perspective:** Family income in the diocese can range from less than \$35,000 to more than \$150,000. Median family income for families with children less than 18 years of age is \$68,064. At the median, the average first child tuition is only 3.2% of income.

Tuition rates set below cost subsidize all families, whether they need it or not. The discount given every

family is substantial. Across the diocese, the average cost per pupil, PreK through 12th grade, was \$7,703 for 2015-16 including systems and non-systems, yet average tuition was \$2,678 for the first child.

Families in lower income categories have no tuition if they qualify for the Wisconsin Parental Choice Program (WPCP) for schools that participate and where space is available. This effectively removes the tuition barrier for lower income households.

Parents are minimally aware of the cost of a Catholic education and the cost of a public education. They have not been conditioned to attach the value of a Catholic school education to their cost of tuition.

SOURCE	PERCENT OF REVENUE	COMMON MINDSET
Subsidy	27.3% for system schools and 41.5% for non-system schools	<p>“parish subsidy is too high for parishes”</p> <p>“parishes spend so much on schools they can’t afford other things”</p> <p>“why don’t parishes without schools give to schools”</p>

**Perspective:** Parents and parishioners are not widely aware of the percent of parish offertory being used for Catholic schools and what that means for the parish. For most parishes directly sponsoring schools, subsidy represents 25% to more than 50% of parish offertory.

SOURCE	PERCENT OF REVENUE	COMMON MINDSET
Fundraising and development	12.6% for system schools and 26.2% for non-system schools	<p>“we have lots of fundraisers”</p> <p>confusing fundraising with development and advancement</p> <p>“don’t have people or time to do development”</p> <p>“people are not willing to give more”</p> <p>“giving to the school decreases giving to the parish”</p>

**Perspective:** Catholic schools have talked about shifting to development and advancement for two decades, with only isolated examples of real success. By contrast, colleges and universities have found tremendous success and been able to sustain these programs. More and more high schools and school systems are sustaining successful programs.

## Observations about the cost of excellence and teacher compensation

- a. Teacher compensation and excellent schools are linked together, because teachers are at the center of a quality education. It is the teacher who delivers the educational experience and the model of faith to students in the context of being schools of discipleship. Compensation should accomplish these things: offer a fair wage with benefits, retain teachers for a career in Catholic schools, and be sufficiently competitive in the market of teaching so teachers choose Catholic schools over the public option.
- b. Catholic schools do not necessarily have to pay the same or more than their public-school counterparts to retain great teachers, but as a rule of thumb compensation needs to be within 10% to 20% of the teaching profession. There are many advantages for teachers who want to teach at a Catholic school, so some discrepancy is accepted even if not ideal.
- c. In the future, cost must reflect the true cost of excellence as defined by a vision for quality Catholic schools and expectations of all healthy Catholic schools.

## Priority/Goal

### **8. Raise teacher compensation to more competitive levels to ensure the best teaching staff in the future.**

#### *Strategies and steps*

- 8.1 Develop a compensation structure that considers cost of living increases, credentials including advanced degrees or certifications, and incentives for leadership roles. Study and consider recommending models that provide incentive pay for key positions.
- 8.2 Establish targets of 80% to 85% of average public school scales as determined within the local region. Establish targets across years of experience and credentials. Targets must follow changes to the tuition model and development of new revenue streams. These targets must follow, not precede, new sources of revenue.
- 8.3 Establish compensation guidelines for school administrators as well as teachers.
- 8.4 Review the benefits offered in comparison to the marketplace for teachers/administrators. Recommend changes or additional benefits currently not available.

## Observations about tuition assistance and tuition rates

- a. Tuition assistance is the principal means by which schools can be available and affordable for all. A new model should be built on tuition assistance.
- b. Tuition assistance has become an accepted way of adjusting cost to families at the collegiate level, and increasingly so at the secondary level. Tuition assistance is largely used for the lowest income class, and needs to target support for the middle-income class.
- c. Tuition assistance is seriously underfunded. Approximately \$2.5 million of tuition revenue could be measured as funded tuition assistance, representing only 7.5% of total tuition income.
- d. Tuition assistance is being generously given to all families in the form of parish subsidy, whether they need the assistance or not. For many families, their decision to enroll is less affected by tuition and more affected by other factors.

- e. Tuition assistance is hidden under the category of parish subsidy, and most parents do not understand the level of assistance they receive.
- f. WPCP has essentially made Catholic education free for low-income families, releasing tuition assistance for middle income and upper middle income families. Tuition assistance models have not been redesigned around this new dynamic.
- g. Experience at several schools suggests tuition is more elastic than thought in certain situations. In other words, increases in tuition handled in the right way do not necessarily stop families from coming. Net growth in tuition revenue can be achieved by increasing tuition and tuition assistance at the same time.
- h. Parents will work hard to send their children to schools they value. Tuition is an important factor, but not the primary factor for many parents, when choosing a school for their children. Some leaders of Catholic schools underestimate the willingness of parents to pay for something they value.
- i. What parents will pay reflects what they value. Willingness to pay tuition is often a reflection of priorities. Catholic schools and the Catholic church must raise the perception of value and differentiate how Catholic schools offer a value distinctly greater than other options.
- j. Because tuition is so far below the real cost and real value, the low tuition could convey that schools are not that valuable because they don't cost that much. It has been shown in the diocese that freezing tuition or offering less tuition does not necessarily attract significantly more enrollment.
- k. The tuition model must be changed from one which seeks to minimize tuition to one which seeks to maximize revenues. This requires a careful balancing of available financial assistance dollars against the impact of increased tuitions on families' ability to pay and, ultimately, enrollment.
- l. Best practice is tuition increases 4% to 6% every year. And with purposeful planning, tuition can leap in certain years to get back on course with the real value of a Catholic education in the marketplace.

## Priority/Goal

### 9. Fund tuition assistance generously and administer it in a way that achieves enrollment goals and furthers the mission of the school.

#### *Strategies and steps*

- 9.1 Every school establish a tuition assistance budget. Direct funding to the budget from multiple sources: development activities like annual fund or events and special gifts, endowment proceeds, parish subsidy, diocesan grants.
- 9.2 Introduce the idea that some tuition assistance can be budgeted and given without a specific funding source. It would be essentially an internal discount given by the school and built into the school budget. This is not the same as uncollectable tuition.
- 9.3 Begin to designate a portion of parish subsidy for tuition assistance. This happens in parallel with increases in tuition rates.
- 9.4 Establish categories for tuition assistance where certain funds are designated for specific groups. This could be a family in a middle-income group who would not qualify for WPCP and would not be low income and may even have some savings, but would struggle to afford Catholic school from current income. The idea is to give tuition assistance across a wider spectrum of income.

### 10. Determine accurately what the cost of education should be based on the vision in the diocesan strategic plan and local school strategic plan. Move tuition closer to cost by establishing 5 and

## 10 year goals.

### *Strategies and steps*

- 10.1 Every school will form a plan and timeline to make the transition. Plans will be submitted to the Office of Catholic Schools which will consult with each school about managing the transition. Using the plan, schools will adopt a new process for setting tuition year to year.
- 10.2 The Office of Catholic Schools will enact a 3-year program to educate, monitor, and assist schools in developing financial projections and transition plans to the new model. Every school will develop a financial projection and use financial modeling to make decisions. True cost to educate will be defined and consistently measured. Year-to-year decisions will be made in the context of long-range goals and a local strategic plan. The Office of Catholic Schools' staff or outside consultants will work with schools individually to build their financial projections and plans.
- 10.3 A well-executed marketing and public relations plan will be implemented 6 to 12 months before major tuition increases go into effect. Schools will be provided with templates to customize their school's message. This will clearly communicate the true cost of Catholic schools and the value of a Catholic education. Parents will understand the benefits to their children, and the options they have to ensure the price they pay is affordable.
- 10.4 All schools will have a tuition covenant or agreement with parents that states the commitment of the school and parish to provide a Catholic education for their children and the commitment of parents to make a financial and personal investment in the success of the school. A sample covenant and process will be provided by the Office of Catholic Schools to each school.
- 10.5 An overview of the school budget and prior year-end financial statement will be presented and explained to parents each year so they understand the true cost of education and see fiscal transparency. A thorough explanation will be provided of what tuition increases fund and how children benefit from a Catholic education. Schools will introduce visible improvements to coincide with major increases in tuition. There has to be a sense that children are benefiting when parents do more.

## Observations about parish subsidy

- a. Parish subsidy represents 27.3% of revenue for system schools and 41.5% of revenue for non-system schools. A total of \$18.37 million was given by parishes in subsidy to schools in 2015-16.
- b. Parish subsidy is so high in some parishes that parish ministry suffers to the detriment of the health of the parish. Levels over 40% of parish offertory are generally agreed to be too high.
- c. Where parish subsidy formulas exist, they create a financial environment of predictability while providing significant support. Most parishes are accepting of current formulas.
- d. Parish subsidy is not a source of growth for revenue in the future. Given the decline in Mass attendance and aging of the Catholic population, parish subsidy may come under some pressure to remain at current levels in the decade ahead.
- e. Parish subsidy has to be viewed as far more than financial, but as an investment realized in multiple forms beyond money: religious education, service and outreach, volunteerism, pastoral care. Parish subsidy has a significant return to the parish and the Catholic church as a whole.

## Priority/Goal

### 11. Parish subsidy will move toward 35% of parish offertory income for parishes that are above this.

#### *Strategies and steps*

- 11.1 Establish targets with a timeline for three years and five years. Targets must follow changes to the tuition model and development of new revenue streams. These targets must follow, not precede, new sources of revenue. Recommend a minimal level of support as well as a maximum level of support. Consider a flexible target that takes into account parish size, financial health, location, and lease income. Include elementary and high school subsidies when establishing targets.
- 11.2 Schools will publish annual reports to parishes and all constituencies that support the school to show the value of their investment.
- 11.3 Revisit the subsidy formulas for high schools for parishes in communities that have a separate high school subsidy.
- 11.4 Parishes will work to enhance their stewardship culture and stewardship education with a holistic approach toward time, talent and treasure.
- 11.5 Parishes not currently contributing anything to Catholic school education should be financial partners in the mission. Study how this contribution should be made and how it should be used.

## Observations about advancement

- a. Advancement efforts vary widely among schools. The most successful schools, however, have demonstrated that substantial advancement funding, both on an annual basis and for large capital projects, can be achieved. Each school needs to conceive and carry out an advancement strategy.

## Priority/Goal

### 12. Build advancement programs at the school level.

#### *Strategies and steps*

- 12.1 Every school will form an advancement plan with specific goals, strategies, benchmarks and accountability.
- 12.2 The advancement plan will be an extension of the schools' strategic plan. Every school will identify a person in addition to the principal who is responsible for advancement. Preferably, the person is compensated.
- 12.3 The advancement function will have clearly defined roles and responsibilities.
- 12.4 Advancement will be supported by a committee of the school advisory board or board of trustees.
- 12.5 Schools will establish an accurate and updated database using current software.
- 12.6 Every school will have a detailed marketing and communications plan that supports fund development and marketing for enrollment and development.
- 12.7 Advancement programs will include a number of events that provides social and community-building opportunities.
- 12.8 Advancement programs will incorporate an effective program of annual giving including

cultivating major donors.

12.9 Advancement programs will build their programs for planned/deferred giving to promote endowment and long-term growth.

12.10 Schools will have an active advancement committee to support the program and actively raise funds. These committees may take different forms depending on the size and organizational structure of the school or system. In some cases a foundation may have been established and fulfills this function.

12.11 Administration, faculty and staff will have an understanding and acceptance of their role in the advancement program.

### **13. Build an advancement program for Catholic schools at the diocesan level.**

#### *Strategies and steps*

13.1 The Office of Catholic Schools will work with the Catholic Foundation to seek foundation and donor support and educational partnerships to secure necessary resources to meet the needs of students and schools.

## **Accounting and Budgeting**

Oversight of school finances needs to be conducted regularly and with greater depth. Financial accountability and reporting is limited through the diocesan finance office. Parish school reporting goes through parishes to the office and reporting is limited to revenue and expense lines only (no line item detail). Systems provide reports once per year, but reports are varied in format and statistics presented.

## **Priority/Goal**

### **14. Update accounting and budgeting processes to support the new model.**

#### *Strategies and steps*

14.1 Financial reporting should be standardized for schools and for systems. Reports should accurately show statistics such as: cost per pupil, dollars budgeted for financial assistance, average level of award per student, net income from advancement, marginal cost of additional students, percentage of revenue from various sources – such as WPCP, and other useful statistics.

14.2 A dashboard of financial health should be easily lifted from the accounting reports and made available to the schools, Office of Catholic Schools, and finance office.

14.3 Over time schools and systems should move to a web-based accounting system. The system should be uniform across the diocese.

14.4 Where groups of schools can work together as a collaborative association of non-system schools, look at centralizing accounting and business functions.

**15. Establish a school finance officer/resource person who will monitor progress and provide assistance to schools and systems with their financial planning.**

*Strategies and steps*

15.1 Initiate a position for finance personnel dedicated to oversight and support of school and system finances. Initially, this position could be part-time and under the supervision of the Superintendent of Catholic Schools or the Finance Officer. Continue to develop a strong relationship and establish reporting processes between the Office of Catholic Schools and the Finance Office to ensure appropriate oversight of all school finances. This will include the review of schools' annual budgets, as well as quarterly and annual reports.

**Diocesan partnership in funding for Catholic education**

**16. The diocese will undertake a major capital campaign for Catholic schools and other diocesan needs.**

*Strategies and steps*

16.1 Local school plans will be important for making the case for capital funding. Schools will have a basic plan in place when the diocesan campaign comes to their area. Some schools or systems will need to conduct a local capital campaign in conjunction with the diocesan campaign to fund significant capital projects.

**17. The diocese will continue to provide Lumen Christi and Advancing the Mission grant monies to schools, but with accountability for compliance with directives and policies of the diocese.**

*Strategies and steps*

17.1 Those schools or school systems who are not in compliance will have their distribution placed in a special escrow account until the Office of Catholic Schools is satisfied that its directives and policies have been fulfilled.