

Strategic Plan for Catholic Schools



Plan Summary



CATHOLIC SCHOOLS
DIOCESE OF KANSAS CITY - ST. JOSEPH

Teachings for life.

August 2010



INDEX

PAGE #

- 1. HISTORY AND CONCLUSIONS**
- 2. VALUES AND PRINCIPLES**
- 3. ACADEMIC EXCELLENCE**
- 5. DIOCESAN CATHOLIC HIGH SCHOOLS AND CATHOLIC IDENTITY OVERVIEW**
- 7. INTEGRATING STEWARDSHIP AND ADJUSTED TUITION FOR FISCALLY STABLE SCHOOLS: STEWARDSHIP**
- 8. ADJUSTABLE TUITION MODEL**
- 9. ASSESSMENT OF NON-SCHOOL PARISHES**
- 10. THE “CHILDREN’S EDUCATION FUND” AND SCHOOL DEVELOPMENT AND ADVANCEMENT**
- 11. DIOCESAN SCHOOL DEVELOPMENT, ENROLLMENT AND MARKETING**
- 12. MARKETING CHALLENGES AND OPPORTUNITIES & STRATEGIES FOR INCREASING ENROLLMENT**
- 14. ATTACHMENTS INDEX**
- 15. ATTACHMENT 1: FORMULAS FOR COST PER PUPIL AND ADJUSTED TUITION AMOUNTS**
- 16. EXAMPLES: APPLICATION OF THE ADJUSTABLE TUITION MODEL**
- 17. ATTACHMENT 2: DIOCESAN ASSESSMENT METHODOLOGY FOR PARISHES WITHOUT SCHOOLS**
- 18. ATTACHMENT 3: SCHOOL ALLOCATION OF DIOCESAN ASSESSMENT FORM NON-SCHOOL PARISHES**
- 19. ATTACHMENT 3a: ALLOCATION METHODOLOGY OF DIOCESAN ASSESSMENT OF NON-SCHOOL PARISHES**
- 20. APPENDIX A: AMENDED OUTCOMES DERIVED FROM MEITLER STUDY OUTCOMES**

HISTORY

Since the Third Plenary Council of Baltimore in 1884, when Roman Catholic bishops in the United States officially expressed their wish that “every Catholic child in the land might have the benefit of a Catholic school,” Catholic people throughout this country have made strong and enduring investments in education. In time the Catholic parochial school system in the United States became the strongest, largest non-public school enterprise in America and, indeed, in the world.

National and local assessments of the Catholic population repeatedly demonstrate that Catholic schools tend to produce Faithful who are better educated, better catechized, and more involved in the Church than those who do not attend Catholic schools. The formidable influence of Catholic schools continues to exert a powerful influence toward human maturity, charity, and prayer. Disproportionately large numbers of priests, religious, parish lay leaders, and civically engaged Catholics are products of Catholic schools. This is so overwhelmingly true that we believe we are safe in considering the Catholic school system in this diocese a precious treasure we should not easily surrender.

A surrender of significant portions of the diocesan school system is certainly not beyond possibility. In the last five years our diocese, along with much of the rest of the country, has witnessed a downward trend in enrollment. In addition to closing four elementary schools, the diocese reports a 16% decline in elementary school enrollment and an 11% drop in diocesan high school students. Even as enrollments have declined costs have continued to rise, an average of 6% each academic year. Very few of our parishes can match this escalation in costs with a proportionate annual increase in revenue. The result of these statistically demonstrable trends is a situation in many of our diocesan schools and their sponsoring parishes, which is untenable.

Therefore, in April of 2008, Bishop Finn announced a diocese wide strategic planning study to devise a way to stabilize weak schools, strengthen all schools, and set every school on a more certain pastoral and financial footing. In this way, our schools might secure a more dependable future in which to witness to the Truth of Christ through worship, inculcate respect for God’s creation, teach the beauty and dignity of human life, and learn to hope, through intelligent living, in eternal life.

CONCLUSIONS

Throughout the last two very active years of school strategic planning, the diocese has contracted with national consultants and worked with hundreds of local Catholics to define our problems and discern solutions. By the grace of God, and through the diligence of generations of Faithful, we are able to claim some important strengths about our current situation:

1. Our diocesan school system students score above the national average in knowledge of the Faith.
2. Our schools also remain remarkably strong in academic standing.
3. There is a considerable, and in some cases heroic, level of support throughout the diocese for the schools.

4. We acknowledge all of our dedicated personnel – not only our teachers and administrators – who serve and witness with passion.

Nevertheless, beyond these positive attributes of our schools, these years of study and planning have identified a chronic want of cohesive marketing, a diminished perception of the imperatives of stewardship, and a patch work quilt approach to school finance that has sometimes pitted wealthier schools in deadly competition with poorer ones. The recommendations of this plan, complicated and challenging as some of them are have been rendered to address these significant findings.

In the course of this report, recommendations will be more completely specified and explained. In this general introduction, all recommendations can be fairly summarized in this short list of overarching strategies.

1. There will be continued commitment to Catholic identity and quality formation in the heritage of faith, including doctrine and the human arts and sciences.
2. Marketing and development efforts for schools must be intensified in the schools and at the chancery.
3. The gospel imperatives of stewardship must be consistently presented to all Catholics so that a broader sense of ownership and involvement in schools is achieved.
4. All parishes should share in the support of Catholic school education throughout the diocese.
5. Funding models for schools should identify true cost, incorporate an adjustable tuition, and strive to strike a more workable balance between affordability for the family and accountability to the sponsoring institution(s).
6. Financial recommendations are arranged in favor of poorer school apostolates.
7. Recommendations strive to honor the Catholic principle of subsidiarity.

VALUES AND PRINCIPLES

Before moving on to a detailed presentation of School Strategic Planning recommendations, it should be admitted that some of the preceding information is pro-forma and, truthful as it is, it's exactly what a reasonable person might expect from a strategic planning study plotting the future of a diocesan Catholic school system. On the other hand, some of what this report represents as the paradigm for school funding is altogether new in the 53-year history of the Diocese of Kansas City-Saint Joseph, though it is not new to much of the rest of Catholic dioceses in the United States.

An objective observer might well wonder at the more innovative aspects of the plan and the complexity of some its conclusions. Therefore, a set of basic principles is offered here as an interpretive key to help the reader understand the operative values employed in this plan. These values were not predictably endorsed, or even widely understood, when the diocesan schools strategic planning process began. Instead, these guiding principles emerged through painstaking seasons of conversations in focus group meetings, task force conferences, and staff consultations. These principles have coalesced through years of researching facts, weighing evidence, and assessing hearts.

1. Catholic education is acknowledged to include more than parish elementary schools and diocesan high schools. While the other valuable apostolates of Catholic education also need supportive attention, it is impossible to address the needs of every type of educational apostolate with this plan. This plan is specific to parish elementary schools, multi-parish elementary schools, and diocesan high schools.
2. Catholic schools have an enduring, complex value critical to the quality of our future as Church and as the leaven of conversion in the modern world. Therefore, they must be endorsed, enhanced, and secured.
3. Catholic schools are the responsibility of the entire Church; all of its people, in every apostolate. Everyone has a responsibility to fulfill toward Catholic schools. We will succeed, or fail, to the extent everyone understands and meets their responsibility.
4. Catholic schools should be practically funded in a dependable, ongoing way.
5. The authority of subsidiary entities should be acknowledged and operative whenever possible. It is proving impossible for each school to articulate successfully its own funding model, so the diocese is stipulating mechanisms of funding in these Strategic Plan Recommendations. However, the diocese desires school apostolates to exercise their own powers of discretion wherever possible, e.g., determining occasions for tuition assistance, setting levels for tuition subsidy, deciding how assessment monies will be applied, etc.
6. Simplicity is highly valued though it is not always feasible or fair. We have always tried to be as simple as fairness would reasonably allow us to be.
7. In an effort to create a school program that is dependable and durable, we have tried to be systematic in approach. Every recommendation offered here was developed with a high regard for consistency. We have tried to limit exceptions yet create a model that respects the inevitable differences in parish/ school communities.
8. Our common cause remains subordinate to our common faith. The object of that faith, Jesus Christ, calls us to constant charity despite the obvious complexity of our situation. Throughout the long course of strategic plan deliberation, Faithful from all over the diocese have consistently modeled a wonderful, patient charity. We hope that same spirit will prevail through plan implementation.

ACADEMIC EXCELLENCE

Academic excellence in Catholic schools demands that each student acquire the knowledge and skills necessary to be a productive member of society and an engaged disciple of Christ. Aspiring for academic excellence demands that students are taught to seek the truth, make moral decisions and integrate their faith into their lives.

By engaging students in rigorous instruction and employing up-to-date resources, our Catholic schools provide an unmatched education by employing the following criteria to maintain academic excellence:

1. Developing strong leadership to effectively carry out the mission of Catholic schools will be a priority for the Diocese of Kansas City-St. Joseph, which includes supervision, evaluation, and professional development for teachers and principals.
2. Each elementary and high school will achieve and maintain accreditation through AdvancEd Accreditation Association as well as the Missouri Non-Public Accrediting Association. Early Education Centers should be accredited by NAEYC or AdvancEd. Such accreditation will be accomplished by requiring each elementary and high school developing a five-year improvement plan with specific goals and strategies for strengthening its Catholic identity, academic program, marketing, development, finances, and facilities. These plans will be reviewed annually both at the school level as well as at the diocesan level.
3. All schools will offer a complete program including instruction in fine arts, global language and physical education and should provide co-curricular opportunities which are age appropriate.
4. Curriculum guidelines for core subject areas are to be developed, continually reviewed and maintained for all K-12 schools.
5. Standardized testing is required in grades 4, 6, and 8 for elementary schools by the CSO.
6. In addition to ACRE or another standardized testing tool in grades 5, 8, and 11 the Schools Office will explore other tools to assess faith development and knowledge by students in our schools.
7. Schools will provide differentiated instruction to accommodate students' wide range of gifts and needs.
8. Technology will be integrated throughout the instructional program to enhance teaching and learning.
9. Boards are advisory at the elementary and early education level. High School boards are of limited jurisdiction and retain the responsibilities outlined in the Administrative Manual (120.5). Each elementary school and early education center should have a school advisory board that promotes a cohesive structure and yet allows for some individuality of the school or center. All boards or councils should be trained according to the guidelines provided by the CSO. Board members should be intentionally chosen for their expertise in areas in which the school needs support, e.g. finance, marketing, development, athletics etc.

The governance of the schools is outlined in the Administrative Manual (110 series) and is a supportive relationship between pastors and the Superintendent and Schools Office in accordance with canon law.

Academic Excellence should be a hallmark of every Catholic School. Aspiring for academic excellence demands that students are taught to seek the truth, make moral decisions and integrate faith into their lives. In partnership with local schools the diocese must ensure that this reputation for excellence continues to be deserved. While economic realities inspire difficult choices the diocese must not allow academic instruction to be diminished.

DIOCESAN CATHOLIC HIGH SCHOOLS

Diocesan Catholic high schools are an integral part of the Catholic Mission of education and provide good value to the families they serve. The current high schools of the diocese are each unique to the markets they operate in but can all benefit from some common strategies.

1. The diocese will develop a program to encourage more families to send their children to diocesan high schools. In recognition of the sacrifices that families with multiple children in diocesan elementary and high schools already make, an Honoring Family Scholarship will be made to each diocesan high school family that has one or more siblings in either a diocesan high school or a diocesan elementary school.
2. The diocese will continue supporting our high schools through the Bishop's Annual Appeal.
3. Diocesan high schools will be an essential part of the diocesan marketing plan and will collaborate with the Catholic elementary schools to provide a seamless transition for students from their parish school to the diocesan high school.
4. In light of the unique circumstances in each market, diocesan high schools will continue to determine their own tuition rates.
5. All parishes are encouraged to help the diocesan high schools reach their enrollment goals through joint marketing efforts, cooperative programming as well as financial and other considerations where practicable.
6. All diocesan high schools will have a strategic plan that is current and includes a five-year financial projection in a standard format developed in collaboration with the Diocesan Finance Office.
7. All diocesan high schools will also have an annual school development plan that will be reviewed by the CSO and will have development training available from the Office of Stewardship and Development.
8. All diocesan high schools will provide a sound Catholic curriculum centered on Jesus Christ with religious education following the guidelines established by the USCCB.
9. The goal of all diocesan high schools should be to meet and exceed state and diocesan academic standards.
10. High school board roles should be clarified and roles defined in conjunction with the Catholic Schools Office.
11. A market study for Eastern Jackson County Catholic diocesan high school needs is being conducted during the spring 2010.

CATHOLIC IDENTITY OVERVIEW

Goals and Recommended Strategies

Catholic identity is integral to the mission of our Catholic schools. This means that our schools must be “readily and unmistakably identifiable as Catholic schools ...working hand and glove with the Church in moving children and their families toward their salvation” in Christ. It is expressed throughout the curriculum and in the school's sacramental and liturgical participation, ethos and spiritual character.

1. Each school will be clearly identifiable as a Catholic school and will partner with parents and parishes to give students faithful instruction in the Catholic Faith and thereby foster a personal faith commitment that is living, conscious and active.
 - a. The Catholic character of schools should reflect the beauty and tradition of the Church and her liturgy, including her sacramental life and the lives of the Saints.
 - b. Schools should teach Church doctrine in the context of salvation history as required by the General Directory of Catechesis (GDC 108). The narration of the wonderful deeds of God and the expectation of Christ's return should accompany the mysteries of the Faith.
 - c. All schools will provide instruction in Catholic doctrine, which must be "imparted in a systematic way, with a view to initiating the hearers into the fullness of Christian life" (CT 18).
 - d. Religion will be taught daily in elementary schools and early childhood centers. High school students will be required to complete eight semesters of theology.
 - e. Catholic moral formation and moral teaching will be integrated appropriately at every grade across subject areas. The importance of respect for human life from conception to natural death and reverence for the body as a temple of the Holy Spirit should be stressed.
 - f. Theology of the Body curriculum should be introduced at the 7th grade level and continued through the senior year in high school.
 - g. Each school should regularly provide opportunities, resources and encouragement for faculty, students and families to engage in daily prayer and scriptural reflection, weekly celebration of the liturgy and frequent reception of the sacraments of Reconciliation and Eucharist.
 - h. The environment of each school should be Christ-centered. Images, visual symbols and other reminders of the Faith should be evident throughout each school building. Each classroom should have an area of sacred space.
 - i. Each school should identify ways to consciously and deliberately invite and encourage the involvement of parents in the religious instruction and faith formation of their children.
 - j. To strengthen the partnership between families and the schools for the education of children in the Faith, parents and teachers are asked to sign a covenant statement to model active participation in the life of their parish. This includes Mass attendance on Sundays and observance of Holy Days for Catholics and weekly attendance at services for other Christians. This is essential to the child's faith formation and flows from our baptismal vows. The covenant will be included within the parent handbook, which parents sign during the registration process.
 - k. Each school should provide for vocations counseling and encouragement of priestly and religious vocations.

2. All Catholic school administrators will be strong spiritual leaders in their schools.
 - a. Catholic school administrators should be members in good standing of the Catholic Church, committed to and knowledgeable of the Catholic Faith and active participants in the life of their parishes. The diocese's Catholic/Christian Commitment of Faith is a part of the annual employment agreement signed by all administrators.
 - b. Teachers and Staff should understand their vocation as Catholic educators and continue professional development aims set by the CSO and by their principals.
 - c. All teachers of religion in grades K through 12 must be Catholics in good standing with the Catholic Church. Religion teachers in the elementary schools should acquire the appropriate catechetical certification from the Bishop Helmsing Institute within five years of being hired as prescribed by the CSO. High school teachers should be appropriately degreed and continue their professional development hours as prescribed by the CSO.
 - d. Administrators should schedule retreats and other spiritual opportunities regularly for the faculty, staff, students, and school board members to deepen their personal faith commitment and foster growth of the faith community within the school.
3. Catholic schools will be valued throughout the diocese and recognized as the shared responsibility of all parishes and parishioners.
 - a. Parishes without schools should promote the values of Catholic school education among their parishioners and encourage parents to consider enrolling their children in diocesan Catholic schools.
 - b. Each school principal should identify ways to maintain and strengthen meaningful connections with the home parishes of its students.
 - c. The CSO and Catholic school administrators should look for ways to tell their story in appropriate avenues of communication and media in the community in which they are situated.

INTEGRATING STEWARDSHIP AND ADJUSTED TUITION FOR FISCALLY STABLE SCHOOLS

STEWARDSHIP

Throughout the many months of this plan, stewardship has been discussed with a variety of definitions being promulgated throughout the parishes. In its simplest form, stewardship is a way of life that involves:

- Recognizing that everything we have is a gift from God.
- Recognizing that we must be grateful to God for the gifts we have.

- Recognizing that we show our gratitude to God by giving back a portion of our time, talent and treasure to do God’s work here on earth.
- Recognizing that God has blessed us uniquely and specifically so that we can help with His work on earth.

All Catholics are called at Baptism to be stewards of the Church – collaborators and cooperators in continuing the redemptive work of Jesus Christ – the mission of the Church. This mission – proclaiming and teaching, serving and sanctifying – is our task. All members of the Church have their own roles to play in carrying out its mission:

- Parents, who nurture their children in the light of the Faith;
- Parishioners, who work in concrete ways to make their parishes true communities of Faith and vibrant sources of service to the larger community;
- All Catholics, who give generous support – time, money, prayers and personal service according to their circumstances- to parish and diocesan programs and to the universal Church.

It is important to remember that stewardship is not a school funding model: it is a way of life, one that models the life of Jesus. It is challenging and even difficult, yet brings intense joy to those that take the risk to live as Christian stewards. As this plan moves forward, it is imperative that stewardship is taught, lived and celebrated with the hope that some day school resources will be in abundance, and we will be able to educate all children that truly desire a Catholic school education.

ADJUSTABLE TUITION MODEL

(K through 8)

The following recommendations relate to the proposed diocesan funding model for K-8 schools called the Adjustable Tuition Model. While this model incorporates concepts of cost per pupil, tuition and adjusted tuition, it has, at its core, the response of all Catholics to the call to stewardship and the hope of not just sustaining, but improving our schools. Adjusted Tuition can be significantly and positively impacted through embracing the principle of stewardship which must include the following: a parish stewardship education plan to teach and encourage all parishioners to live as Christian stewards, embracing a new plan for giving with broad support from all non-school parishes; and cultivation of community wide support for Catholic school education by both corporations and individuals regardless of their religious affiliation.

1. All diocesan elementary schools* will use the Adjustable Tuition Model.
2. The Adjustable Tuition Model consists of the following:
 - a. A true cost of education per pupil is determined in each school.
 - b. This true cost of education is reduced by the fees charged in each school as well as other outside income. The resulting amount is the “tuition.”
 - c. Next, this tuition now “adjusted” through the following factors:
 1. The subsidy each sponsoring institution gives the respective school.
 2. The allocation each school receives from the assessment of non-school parishes.
 3. Whatever tuition assistance a particular family qualifies for.

4. Distributions from the diocesan Children's Education Fund as they are able to be made.

The Adjustable Tuition Model is further specified in Attachment 1.

3. The Diocesan Finance Office will develop a) general guidelines for allocating expenses between parish and school, and b) model spreadsheets and best practices to assist parishes and schools in setting the adjusted tuition and budgeting.
4. The success of the Adjustable Tuition Model is closely linked to 1) the family's ability to pay the adjusted tuition, 2) the parish's commitment to promote stewardship and increase its ability to support the school, and 3) the results of the diocesan assessment (of non-school parishes) and the "Children's Education Fund."
5. Parishes with schools are encouraged to maintain an adequate level of parish subsidy to enable the across-the-board adjustment of tuition, the ability to offer tuition assistance and the ability to offer multi student tuition discounts as appropriate. While the Adjustable Tuition Model may allow a parish to adjust its level of subsidy, this should not negatively impact the school.
6. The Adjustable Tuition Model will be implemented at the beginning of fiscal year 11/12. Fiscal year 10/11 will be used to communicate the new model and educate pastors, parish/school staffs and parishioners. A schedule of key tasks and implementation dates for the educational process will be developed.
7. Parishes will be educated on the key IRS regulations relating tuition, tithing and the Adjustable Tuition Model. Parishes will adhere to those regulations.
8. The final amounts of the established 'adjusted tuition' will be communicated to the other schools in the POD (pastors, principals and business managers). Boundaries of parishes will be respected unless negotiations between pastors/parishes dictate alternatives. Parishes will adhere to current non-transfer policies promulgated by the Catholic Schools Office in the administration manual.
9. The diocese will require the use of objective third parties for the evaluation of tuition assistance for families. To that end, the diocese will negotiate a single third-party vendor relationship to assist parishes in determining the amounts of tuition assistance to be awarded to particular families. Parishes will be strongly encouraged to use this vendor selected by the diocese, but will be allowed to use other vendors at their discretion.

ASSESSMENT OF NON-SCHOOL PARISHES

1. A parish without schools will financially support the mission of Catholic schools through an assessment.
2. The assessment formula is attached and is based on median household income of a parish. (See Attachment 2.) Beginning with a base amount and a percentage of offertory income, this assessment also establishes a limit to ensure a reasonable outcome. Debt payments and interest paid are considered.
3. The assessment will be phased in over a two year period beginning fiscal year 11/12. Fiscal year 10/11 will be used to communicate the program and educate parishioners about their participation.

4. Unique relationships exist between parishes with schools and neighboring parishes. An unintended consequence may occur during the transition to the adjustable tuition model and implementation of the assessment program whereby parish schools may receive less revenue if covenants are abandoned. Parishes that are in covenant relationships and those who want to enter into new covenants are encouraged to work with parishes with schools to maintain an adequate level of subsidy during and after the change. Covenant agreements often cover liturgical, governance and financial matters. If a covenant agreement contains school finance or other school matters, it should be submitted to the Catholic School Office for approval consistent with current practice.
5. Based on receipt of assessment income, allocations will be made to schools per formulas in Attachment 3. The allocation formula is based on the median household income of the zip code in which the school is located and the number of students enrolled in the benefitted schools.
6. The assessment will also fund a “Schools @ Risk” pool which will provide assistance to identified schools (particular definition/criteria to be determined).
7. Recipient schools will be encouraged to make the use of allocated assessment income a priority for tuition assistance/tuition subsidy.

THE “CHILDREN’S EDUCATION FUND”

1. The “Children’s Education Fund” will be established to raise funds on the diocesan level to generate additional resources for diocesan Catholic schools. The initially implemented funds include the Strong City School Fund and the diocesan high school Honoring Family Scholarship Fund. Other funds will be included as needed or resources become available and will include, but not be limited to the following: Tuition Assistance Fund, Capital Improvement Fund, New School Fund, and Diocesan School Endowment.
2. The Central City School Fund will be renamed to Strong City School Fund. The Fund will be redefined and not geographically exclusive.
3. Funds for the “Children’s Education Fund” will come from diocesan development efforts and the Bishop’s Annual Appeal.
4. In an effort to recognize the sacrifices families with multiple children in Catholic schools make every year and to encourage more families to send their children to diocesan high schools we are creating Honoring Family Scholarships.
 - Honoring Family Scholarships will be made available to diocesan high school families that have one or more siblings in either a diocesan high school or a diocesan elementary school.

SCHOOL DEVELOPMENT AND ADVANCEMENT

1. Comprehensive school development programs are as critical as ever. School costs will continue to rise, facilities will need ongoing and preventative maintenance and new programs will need to be implemented. Sound development programs can help alleviate some of these costs. Stewardship and Development in collaboration with the

- CSO will work with all schools to plan and help implement new development strategies.
2. It is understood that school principals and staff are already stretched so each school should identify a development committee of school, parish and community volunteers.
 3. All schools will conduct a development assessment based on guidelines they have received from the Office of Stewardship and Development.
 4. Stewardship and Development will assist each school development committee with creating a development plan.
 5. Schools will be evaluated on their development plan at a yearly review with the CSO.
 6. Training on a variety of development strategies will be given throughout the year to volunteers and staff to strengthen their development knowledge. The training topics will be identified from the assessments.

DIOCESAN SCHOOL DEVELOPMENT

1. It quickly becomes very obvious that to help our Catholic schools become fiscally stable and continue providing spiritual formation, excellent academics, and a value based education it will take all parishes, schools and the diocese to work together on stewardship and development strategies.
2. It is recommended the diocese pilot a parish offertory enhancement program as soon as possible and carrying through fiscal year 10/11. This program will be stewardship based and have some customization per parish. If the program is successful, all remaining parishes will be asked to implement the program in fiscal year 11/12.
3. All diocesan school development will be done through the “Children’s Education Fund”, but will report to Stewardship and Development and work collaboratively with the CSO. Additional development staff will be hired for the Fund.
4. The “Children’s Education Fund” staff will also be responsible for the ongoing training and reviewing of the school development efforts.

ENROLLMENT AND MARKETING

Catholic schools exist in a competitive marketplace, and families have an array of choices. To realize their full potential as instruments of evangelization, schools also must offer an unmatched education. Motivated by various aspirations, families will choose to enroll based on personal value systems – Faith and values, next-level success, or entrée to professional lives. While all may not choose Catholic schools for the same reasons, all who enroll will have the opportunity to discover the Faith and a system of meaning that will enable them to make sense of their lives.

Over the past five years, a trend in Catholic school enrollment confirms a need for greater attention to marketing and retention. In addition to closing four elementary schools, the diocese reports a 16% decline in the Catholic elementary school population, resulting in more than 2,500 empty seats in classrooms. At the same time, enrollment in diocesan high schools decreased by 11%.

MARKETING CHALLENGES AND OPPORTUNITIES

1. Parish Spirituality Reports and the US Census chart a decline in the numbers of infant baptisms and in the overall school-aged population. These trends point to a shrinking pool of potential students.
2. In 2009, 75% of elementary school graduates enrolled in Catholic high schools. Of this group, 40% enrolled in private schools, and 35% chose a diocesan high school. The diocese aspires to encourage more elementary school graduates to choose diocesan high schools.
3. The increase in the numbers of Catholic families of Hispanic origin presents a unique opportunity for growth and evangelization.

STRATEGIES FOR INCREASING ENROLLMENT

- I. Goal – Research, develop and implement a school marketing program that fosters a strong public image, promotes the value and benefits of a Catholic school education, stabilizes enrollment, has long-term funding, and utilizes a variety of media.
 - A. Steps One – To arrive at an authentic understanding of the market, the diocese will sponsor market research. As a first step, the diocese will administer surveys in an electronic format, one for current school parents and one for community members with interest in Catholic schools. As a second step, the diocese will engage a qualified agency to conduct qualitative market research. The resulting quantitative and qualitative information will provide a clear understanding of the aspirations, priorities and factors influencing school choice by current and potential school parents.
 - B. Step Two – Informed by market research, the diocese will engage a qualified agency to develop the creative expression of the Catholic school branding strategy. This will result in a creative brief, positioning statement, key messages, tagline, and the visual identity.
 - C. Step Three – Armed with market awareness and a clear branding strategy, the diocese will develop an overall Catholic school marketing plan. The plan will include a toolkit of outreach materials, a timeline for launching the brand, and make recommendations for the preferred channels of communication.
 - D. Step Four -- To ensure a consistent message, the diocese will train personnel on the branding strategy and the overall marketing plan.
 - E. Step Five -- To support each school's recruitment and retention needs, the diocese will provide training for school marketing committees. The purpose of this training is to provide support and resources for the development of school-specific marketing plans that focus on recruitment and retention of students.
 - F. Step Six – The diocese will identify methods to measure, monitor and evaluate outcomes from diocesan and local school marketing plans. Through this process, the diocese and local school marketing committees will have the information necessary to adjust plans to achieve results.

II. Goal – Institutionalize a marketing mindset throughout the Catholic school community

- A. Step One – Each school will establish a local marketing committee with responsibility for developing and implementing a marketing plan for recruitment and retention of students.
- B. Step Two – The diocese will offer training and networking opportunities for marketing committees.
- C. Step Three – The diocese will work with school personnel and volunteers, pastors, parishioners and the community to promote the value of and enrollment in Catholic schools.

III. Goal – Incorporate specific strategies to recruit students of Hispanic origin

- A. Step One – Working in collaboration with the Diocesan Director of Hispanic Ministry, the diocese will ensure that market research findings resonate with Hispanic audiences.
- B. Step Two – The diocese will tailor school marketing programs and materials to the needs of Spanish-speaking audiences.

ATTACHMENTS

1. Formulas for Cost Per Pupil and Adjusted Tuition Amounts
2. Diocesan Assessment Methodology for Parishes Without Schools
3. School Allocation of Diocesan Assessment from Non-School Parishes
 - 3.1 Allocation Methodology of Diocesan Assessment of Non-School Parishes
4. Amended Outcomes Derived from Meitler Study Findings

ATTACHMENT 1

FORMULAS FOR COST PER PUPIL AND ADJUSTED TUITION AMOUNTS

I. Information Needed

- (A) Basic School Expense Accounts
 - sum of Accounts 5100 through 5490
- (B) Capital Reserve Allocation
 - 5% of the Total of Accounts 5100 through 5490
- (C) “% of Enrollment Capacity” Enrollment Figure
 - determined and agreed to by all schools in a given POD to be used by all schools in that POD.
- (D) Most Recent 5 Year Average Annual Enrollment
 - calculated by each school
- (E) Projected Enrollment
 - number between (C) and (D) determined by each school.
- (F) Total of Select Non-tuition Income
 - total of Accounts 4200 (Development/FR), 4300 (Interest and Rent) and 4513 through 4540 (Fees)
- (G) Projected Parish Subsidy to School

II. Cost per Pupil $(A + B)/E$

III. Tuition $(A + B - F)/E$

IV. Adjusted Tuition $(A + B - F - G)/E$

V. Adjusted tuition may be further reduced by whatever tuition assistance a particular family qualifies for as well as multi-child family discounts, distributions from the “Children’s Education Fund” and assessment allocation.

EXAMPLES: APPLICATION OF THE ADJUSTABLE TUITION MODEL

VI. Example 1	<u>School #1</u>	<u>School #2</u>
A. Basic School Expenses	\$2,300,000	815,000
B. 5% Reserve Allocation	115,000	40,000
C. Agreed –to Capacity Figure	550 (85%)	180 (85%)
D. 5 Yr. Avg. Enrollment	520	190
E. Projected Enrollment	530	182
F. Non-tuition Operational Income	300,000	220,000
G. Level of Parish Subsidy from stewardship	1,900,000	420,000
Cost per Pupil (A + B)/E	\$ 4,556	\$ 4,698
Tuition (A + B – F)/E	\$3,991	\$3,489
Adjusted Tuition (A + B – F – G)/E	\$406	\$1,181

Adjusted Tuition can be further adjusted through Tuition Assistance, multi-family discounts, distributions from the “Children’s Education Fund” and assessment allocation.

VII. Example 2 – Level of Parish Subsidy Changes

G. Level of Parish Subsidy from stewardship	1,000,000	600,000
Adjusted Tuition (A + B – F – G)/E	\$2,104	\$192

ATTACHMENT 2

Diocesan Assessment Methodology for Parishes Without Schools

*Based on a Combination of an Annual Base Fee and an Assessment Rate*¹

FORMULAS	<p><i>Parish assessments are derived by comparing the two calculations below with the lower amount being used.</i></p> <p><i>Primary Assessment Calculation: $A + (.0225 \times (B - C))$ or</i></p> <p><i>Limit Test Calculation: $B \times D$</i></p>
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Definitions of A, B, C and D

- A - This is a base fee assigned by the median household income for the zip code where parish properties are located. The median household incomes were identified by using "Demographics NOW", a published statistical database, and will be adjusted by the Diocese every three (3) years. See table below.
- B - The total parish offertory per year.
- C - The total annual payment on the principal balance of parish debt and interest paid.
- D - A rate cap is assigned to each median household income category. The cap is used as a limit test of the assessment level.

An example: Parish A has an offertory of \$156,000 and debt plus interest payments of \$44,000. Their Median Household Income is \$50,000 - \$59,999. Taking their assigned base of \$20,000 and adding their rate assessment calculation of \$2,520, Parish A would have a primary assessment calculation of \$22,520. Their limit test calculation (\$156,000 times 6.75%) is \$10,530. Comparing this number to their primary assessment calculation of \$22,520 and using the lower number means their assessment is kept at the lower number - \$10,530.

<u>MEDIAN HOUSEHOLD INCOME CATEGORIES</u>	<u>COMPONENTS OF THE PRIMARY CALCULATION</u>		<u>RATE FOR THE LIMIT TEST</u>
	<u>BASE FEE</u>	<u>ASSESSMENT RATE</u>	<u>RATE CAP</u>
\$0 - \$29,999	\$5,000	2.25%	3.75%
\$30,000 - \$39,999	\$10,000	2.25%	4.75%
\$40,000 - \$49,999	\$15,000	2.25%	5.75%
\$50,000 - \$59,999	\$20,000	2.25%	6.75%
\$60,000 - \$69,999	\$25,000	2.25%	7.75%
\$70,000 - \$79,999	\$30,000	2.25%	8.75%
\$80,000 - \$89,999	\$35,000	2.25%	9.75%
\$90,000 - \$99,999	\$40,000	2.25%	10.75%

¹ Median Household Income used in this illustration is based on the two zip codes with the greatest number of households for each parish. Future versions of the assessment calculation will be based on the average of all zip codes within parish boundaries.

ATTACHMENT 3

ASSESSMENT FUND ALLOCATION MODEL

(WITHOUT HIGH SCHOOLS)

HYPOTHETICAL SCHOOL ALLOCATION OF DIOCESAN ASSESSMENT FROM NON-SCHOOL PARISHES*

The pool of assessment income is divided into two (2) pieces. Fifteen (15) per cent of assessment income will be designated to a "Schools @ Risk" fund and the remaining eighty-five (85) per cent will be allocated to the elementary schools of the Diocese through the methodology below. Guidelines for disbursements from the "Schools @ Risk" fund are still in development.

A			B	C	D	E	F	G	
# PUPILS	MEDIAN HOUSEHOLD INCOME	SCHOOL	AVG # PUPILS	TOTAL # PUPILS	MEDIAN HOUSEHOLD INCOME CATEGORIES	WEIGHTING	% OF TOTAL	\$824,526 POOL ALLOCATION	SCHOOL ALLOCATION
213	\$34,185	School							\$148,690
97	\$34,469	School							\$67,713
153	\$34,825	School							\$106,806
40	\$36,093	School							\$27,923
18	\$36,635	School							\$12,565
90	\$37,723	School							\$62,827
115	\$39,258	School							\$80,279
GROUP 1			91	726	\$20 - \$39,999	4.90	61.47%	\$506,804	
55	\$40,257	School							\$5,493
150	\$42,621	School							\$14,980
170	\$45,815	School							\$16,978
271	\$47,576	School							\$27,064
291	\$47,923	School							\$29,062
588	\$49,311	School							\$58,722
290	\$51,109	School							\$28,962
120	\$51,569	School							\$11,984
106	\$51,708	School							\$10,586
105	\$53,385	School							\$10,486
GROUP 2			215	2146	\$40 - \$59,999	2.07	25.99%	\$214,317	
209	\$61,306	School							\$5,399
183	\$61,693	School							\$4,727
378	\$64,961	School							\$9,764
309	\$69,290	School							\$7,982
231	\$70,366	School							\$5,967
592	\$75,184	School							\$15,293
616	\$77,623	School							\$15,912
483	\$82,242	School							\$12,477
460	\$84,792	School							\$11,883
542	\$93,263	School							\$14,001
GROUP 3			445	4003	\$60,000 & UP	1	12.54%	\$103,405	
6875		# SCHOOLS	27	255		7.97			\$824,526

* This example is purely hypothetical as the determination of median household income has not been completed. Median household income will be a calculated amount. The approach is anticipated to use the zip codes of all students in a school and the median household income will be weighted by students in each zip code. Note that all median household income references are from DemographicsNOW, an independent published database derived from U.S. Census Bureau information.

ATTACHMENT 3a

ALLOCATION METHODOLOGY OF DIOCESAN ASSESSMENT OF NON-SCHOOL PARISHES

ALLOCATION FORMULAS RESTATED:

Average Number of Pupils - Sum of all schools in each group/category divided by the number of schools in that group.

Sum of Column C (by group) / # schools in the group = Totals in Column B

Weighting - Largest group average divided by each group's average size.

Group average from Column B (largest group average) / each group's Column B average

% of Total - Group's weighting divided by the total of all weightings.

Group's weighting in Column E / sum of all weightings in Column E

Primary Pool Allocation - Group's % of allocation times available \$s in primary pool distribution times available \$s (top of Column F.)

Each group % from Column E * Available \$s (Column F header)

School Allocation - School population divided by group's total in Column C times group's allocation in Column F.

School population in Column A / Group total in Column C * Group allotment in Column F.

ATTACHMENT 4

AMENDED OUTCOMES DERIVED FROM MEITLER STUDY FINDINGS

Vision for Catholic Schools

At the heart of the Catholic school's existence is the potential to form people of faith and to hand on the spirit of the Catholic tradition. The U.S. Bishops have stated clearly that Catholic schools are "the most effective means available to the Church for the education of children and young people."

With great consistency, research on U.S. Catholics find strong correlations between religious attitudes, behaviors of Catholic adults, and the number of years they were educated in Catholic schools. To safeguard this rich resource, the diocese commits to a vision for distinctly Catholic, academically excellent and fiscally stable schools.

Distinctly Catholic Schools

1. proclaim missions that are Catholic and Christ-centered
2. recognize the foundation and centrality of the family
3. affirm the knowledge and practice of the faith and doctrinal teachings in school life
4. form graduates clear in the teachings of the Catholic faith
5. maintain a strong Catholic identity and, at the same time, welcome students of other faiths
6. reflect the diversity of parishes and local communities
7. promote the value of Catholic schools in their parishes as an important ministry and inspire support of the school
8. collaborate with parishes to foster active participation in the parish

Academically Excellent Schools

1. provide a superior, age-appropriate and comprehensive academic program
2. maintain elementary and high school accreditation through the Missouri Non-public School and AdvancEd Accreditation Association
3. maintain early childhood program accreditation through AdvancEd Accreditation Association or the National Association for the Education of Young Children
4. employ certified teachers and administrators who demonstrate excellence in their profession, and are Christ-centered role models
5. develop school advisory committees comprised of members who have expertise and training to provide leadership and support for the school, school administration, and pastor

Fiscally Stable Schools

1. grow revenue to improve and sustain superior educational programs
2. keep schools affordable for parishes and families seeking Catholic school education for their children
3. maintain high quality facilities that accommodate superior programs

4. promote support from their parishes for the financial stability of the school
5. create effective development and advancement programs
6. achieve an enrollment capable of supporting a high quality program
7. compensate teachers in a manner that attracts and retains qualified staff
8. operate within a balanced budget and practice good business management
9. are guided by the principle that Catholic schools are the responsibility of the entire Church; all of its people, in every apostolate.

GOALS:

Catholic Identity

1. Each school will be clearly identifiable as a Catholic school and will partner with parents and parishes to give students sound instruction in the Catholic faith and foster a personal faith commitment that is living, conscious and active.
2. All Catholic school administrators will be strong spiritual leaders in their schools.
3. Catholic schools will be valued throughout the diocese and recognized as the shared responsibility of all parishioners.

Enrollment and Marketing

1. Catholic schools in the Diocese of Kansas City ~ St. Joseph will be effectively marketed to create a strong public image in the community, promote the value and benefits of a Catholic school education, support development efforts and increase enrollment.
2. Individual schools will implement focused marketing and retention programs to increase enrollment and consistently operate at 90% capacity or above.
3. Diocesan and local marketing efforts will include a program to actively recruit Hispanic children.
4. Parishes with and without a school will be expected to actively encourage parents to choose a Catholic school education for their children.
5. When new parishes are established, the parish master plan will ordinarily include an eventual school.

Academic Excellence

1. Every Catholic school in the Diocese of Kansas City ~ St. Joseph will be recognized for its effective combination of Catholic identity and academic excellence, which distinguishes Catholic schools as uniquely different from other schools in the community.
2. Catholic schools will provide program opportunities for students with a wide range of gifts and needs.

3. Each elementary school and high school department will develop a multi-year curriculum improvement plan.
4. Technology will be integrated throughout the instructional program to enhance teaching and learning.
5. Schools will continue to assist families by providing safe, supervised, enriching, high quality programs for young children.

Leadership and Governance

1. Developing strong leadership to effectively carry out the mission of Catholic schools will be a priority for the Diocese of Kansas City ~ St. Joseph.
2. Catholic schools in the Diocese of Kansas City ~ St. Joseph will be governed by a model that best fits their local situation. Under ordinary circumstances, the parish model is preferred for elementary schools.
3. Each school will develop a five-year strategic plan with specific goals and strategies for strengthening its Catholic identity, academic program, enrollment, finances and facilities. These plans will be reviewed and updated annually.
4. The superintendent of schools will work collaboratively with all relevant parties to ensure the successful implementation of the strategic plan for schools.
5. The Catholic Schools Office will be adequately staffed to assist the Superintendent in providing leadership and oversight for the schools in the diocese.
6. The Diocesan School Board will assist the Superintendent as requested in providing leadership for the schools, implementing the strategic plan and serving as a resource, especially in the areas of marketing, planning, finances, facilities and technology.

Northland Catholic Schools

1. Continued collaboration among the Northland schools is critical. Northland parishes without schools should avidly support enrollment in neighboring schools.
2. In the future, expand Catholic schools as needed to serve the large population growth occurring in some areas. Open schools only after a careful enrollment market study makes a compelling case that the new school will be able to sustain viable enrollment and does not create over supply causing undesirable consequences for existing schools.
3. Increase enrollment at St. Pius X High School and build greater support in the community through an effective and integrated marketing program.
4. Update the comprehensive strategic plan for St. Pius X High School.

5. Set enrollment and financial benchmarks for each of the elementary schools. Monitor the progress of each school in attaining those benchmarks.

Southeast Elementary Schools

1. Determine the feasibility of establishing a new school with a covenant agreement at St. Sabina Parish, in Belton, Holy Spirit, in Lee's Summit, or utilizing the Kurzweil property.
2. St. John Francis Regis, St. John LaLande, Nativity of Mary and Our Lady of the Presentation Schools and Our Lady of Lourdes will develop /update a strategic plan for the school which includes multi-year enrollment and financial projections.
3. After adjustments for assessment allocations, Southeast POD parishes are strongly encouraged to maintain school assistance.
4. Set enrollment and financial benchmarks for each of the elementary schools. Monitor the progress of each school in attaining those benchmarks.

Southeast High Schools

1. Archbishop O'Hara and St. Mary High Schools will submit a five-year strategic plan to the Catholic Schools Office.
2. A market study is being done to determine the best location for and type of high school to attract students and to serve the area long term.

St. Joseph Catholic Schools

1. Efforts to promote collaboration and communication among the schools in St. Joseph will continue and be strengthened.
2. A common funding model for the schools in St. Joseph will be consistently implemented.
3. Each school will strengthen its development efforts and increase its endowment fund.
4. Each school will develop strategies to ensure the student body reflects the diversity of the area.
5. The high school strategic plan will include specific steps to ensure the school operates within a balanced budget.
6. A pastoral planning process will be initiated for the St. Joseph area parishes and schools.
7. Set enrollment and financial benchmarks for each of the elementary schools. Monitor the progress of each school in attaining those benchmarks.

Southwest Kansas City Schools

1. Set enrollment and financial benchmarks for each of the elementary schools. Monitor the progress of each school in attaining those benchmarks.

Rural Schools

1. Set enrollment and financial benchmarks for each of the elementary schools. Monitor the progress of each school in attaining those benchmarks.

Central City Schools

1. To further ensure accessibility to Kansas City's urban core Catholic schools, the fund offers tuition assistance to low-income families and operational support to the schools that demonstrate financial need.
2. In light of their unique history and geographic locations, the schools witness to:
 - a. supporting families of modest economic means;
 - b. evangelizing those who attend the school;
 - c. witnessing to the Church's concern for the poor;
 - d. and offering an excellent education in areas that do not have alternatives.
3. The strategic plan documents the emergence of similar economic and demographic trends at other schools in the diocese. In response to these needs, the diocese will explore ways to develop the broad-based community support necessary to strengthen and sustain schools facing similar challenges:
 - a. The Diocese of Kansas City ~ St. Joseph will clarify the mission of the Central City Schools.
 - b. Central City Schools will strive for high quality, comprehensive programs and equitable access to the educational resources needed.
 - c. Enrollment in Central City Schools will reflect the diversity of the community by reaching a racially and ethnically diverse population.
 - d. Current covenant agreements among parishes which support the schools may be adjusted in light of assessment allocations but should not result in a decreased level of general support.
 - e. Our Lady of Guadalupe and Our Lady of the Angels Schools should maintain a strong spirit of collaboration resulting in academic, enrollment, professional and financial benefits for both schools.

- f. Set enrollment and financial benchmarks for each of the elementary schools. Monitor the progress of each school in attaining those benchmarks. .
- g. Funding will be sought for the capital investment needed to ensure that facilities in the Central City Schools are sufficient for quality programming, safe, attractive and well-maintained.

Facilities

1. Every school will have a long-range facilities plan as part of its strategic plan.
2. A capital funding plan will accompany each facility plan.