

# Springfield Catholic Elementary Schools

Diocese of Springfield in Illinois

## Strategic Plan 2007 – 2012

Blessed Sacrament School  
Cathedral School  
Christ the King School  
Little Flower School  
Saint Agnes School  
Saint Aloysius School  
Saint Joseph School  
Saint Patrick School

March 22, 2007

Dear Friends,

The Catholic schools in the city of Springfield were built upon the rich legacy of commitment to education and the faith formation of our children. For well over a century, our Springfield parishes have sacrificed to maintain their schools and continue this rich tradition. As we move forward in the 21<sup>st</sup> century, we hold a new vision of collaboration and cooperation among our schools and parishes.

We look with enthusiasm and hope to the future. Invigorated by the accomplishments of the past, we have prepared a strategic plan to give direction to our future. With gratitude and respect for the past, we have evaluated our present circumstances, resources and needs. We look to the immense potential of our future. This strategic plan is the result of the prayerful study and reflection of a dedicated committee of pastors, principals, parents and parishioners. Our recommendations reflect our hope for the future and a profound commitment to the important ministry of Catholic education.

We believe that with the renewed commitment of our parishes, and the continued generous sacrifice of the Springfield Catholic and broader communities, Catholic school education will always be available, affordable and accessible to any family that desires it for their children. The development of this strategic plan is the first step. Its implementation and success are the responsibility of all members of the Springfield Catholic community.

Let us begin this journey with faith, courage and conviction!

Sincerely,

Jennifer G. Burke  
Co-Chairperson  
Strategic Planning Committee

Sr. M. Joan Sorge, O.P.  
Co-chairperson  
Strategic Planning Committee

Rev. David J. Hoefler  
Steering Committee  
Strategic Planning Committee

Rev. Robert J. Jallas  
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## **Springfield Catholic Schools Diocese of Springfield in Illinois Executive Summary**

### **Introduction**

The Springfield Catholic school principals and pastors gathered with Diocesan personnel and Bishop Lucas at the Catholic Pastoral Center in February 2006 to begin dialog regarding the future of Catholic education in the Springfield area. The expressed concerns of the group, along with an overview of the enrollment and financial data from the past seven years, resulted in Bishop Lucas' commitment for the Diocese to fund a consultant to lead our schools in a long-range planning process. The National Catholic Education Association (NCEA) was contracted to guide and direct cluster groups of schools throughout the Springfield Diocese in a strategic planning process. This process began in September 2006 and continued through April of 2007.

The Springfield strategic planning committee was comprised of the following individuals: the pastors of the seven parishes with Catholic elementary schools and the principals of the eight Springfield Catholic elementary schools (Blessed Sacrament, Cathedral, Christ the King, Little Flower, Saint Agnes, Saint Aloysius, Saint Joseph, Saint Patrick) along with two other representatives from each of those schools. Representatives from the two Catholic high schools also served on the strategic planning committee: the president, principal and another representative from Sacred Heart – Griffin High School and the principal of Ursuline Academy.

The Strategic Planning Committee initially met with NCEA personnel on September 27, 2006, followed by meetings on November 20, 2006, January 11, 2007, February 7, 2007 and March 22, 2007. Consultation between the meetings was done by telephone and email. During the months of the planning process, the Springfield Cluster Strategic Planning Committee members met at least twice a month to complete the work required by the NCEA.

The Springfield Area Strategic Planning Committee concurs with the United States Conference of Catholic Bishops' (USCCB) 1990 document *In Support of Catholic Elementary and Secondary Schools*. This document states that Catholic schools

*afford the best opportunity to realize the fourfold purpose of Christian education... to provide an atmosphere in which the Gospel message is proclaimed, community in Christ is experienced, service to our sisters and brothers is the norm and thanksgiving and worship of our God is cultivated...it is the responsibility of the entire Catholic community – bishops, priests, deacons, religious and laity – to continue to strive towards the goal of making our Catholic elementary and secondary schools available, affordable and accessible to all Catholic parents and their children, including those who are poor and middle class.*

We appreciate the most recent statement from the United States Conference of Catholic Bishops, *Renewing Our Commitment to Catholic Elementary and Secondary Schools in the Third Millennium* (2005). The Bishops urged us to turn our focus on the future and its many challenges. Among the challenges listed by the USCCB that Springfield currently faces are:

- Need for ongoing formation in a faith-based Catholic culture for the lay faculties and staff who administer these schools
- Need to address the serious financial burdens of Catholic schools on parents, teachers and parishes

- Need to intensify efforts in advocating just and equitable treatment of our students and teachers in federal and state-funded educational programs.

The work of this planning committee was further motivated by the conclusive remarks of the Notre Dame University Task Force Report on Catholic education, entitled *Making God Known, Loved and Served: The Future of Catholic Primary and Secondary Schools in the United States*.

*“Perhaps the best way to appreciate the power of Catholic schools is to imagine the Church in the United States without them. What would it look like? Would it be as robust and vital? How would it produce generous leaders? How would it serve immigrants? How would it provide avenues of educational opportunity to the poor, especially those in our cities? The rise of evangelical Christian schools shows that other Christian communities have learned what many Catholics have forgotten or are willing to ignore – that there is no substitute for spending 35 hours each week in an educational environment permeated by faith and Gospel values. To those who wonder how we can afford to make the investment necessary to sustain, strengthen and expand Catholic schools, we respond by turning the question on its head. How can we afford not to make this investment? Our future depends on it in more than we may suspect.*

*Will it be said of our generation that we presided over the demise of the most effective and important resource for evangelization in the history of the Church in the United States? Will it be said of our generation that we lacked the resolve to preserve national treasures built upon the sacrifice of untold millions? Will it be said of our generation that we abandoned these powerful instruments of justice that provide educational opportunity and hope for families otherwise trapped in poverty? Surely not. Instead, when the story of Catholic schools is written, historians will look back on our age and marvel that against great odds, we changed the ending. By then, of course, we will know – we will see – the promise that Christ Himself made: that He will come, that He will inspire us through the abiding presence of the Holy Spirit as history unfolds to make all things new, and that he will never leave us orphans but reveal to us that we are all beloved children of our Father.”*

In response to the U.S. Bishop’s recent pastoral letter on Catholic education, *Renewing Our Commitment to Catholic Elementary and Secondary Schools in the Third Millennium*, the Catholic Schools Offices of the six Arch/Dioceses in Illinois sponsored a *Summit for Catholic School Education* in February 2007. Leaders of Catholic education in Illinois, including the Springfield pastors and principals attended this summit to network, reflect and discuss how to:

- Ensure that Catholic schools remain available and accessible in the future
- Establish that the financing of Catholic schools is the responsibility of all Catholics through a renewed focus on the spirituality of stewardship
- Advocate for Catholic schools through political action on the state and federal levels

This summit reaffirmed Catholic schools as the Catholic Church’s greatest tool for evangelization.

Our Catholic schools are a vital part of the teaching mission of the Church. The Springfield area Catholic schools embrace this mission – to evangelize the young people of our Diocese through Catholic education. Our young people are the Church of today and tomorrow. We call upon the

entire Catholic community to support and assist with the mission of Catholic education in the Springfield area schools.

This strategic plan is an investment in the future of the children of our parishes. Our goal is to strengthen and stabilize our educational environments that are permeated by faith and Gospel values. We seek to create a solid future for a vibrant and innovative education. We will work untiringly for a united vision for the future of our schools. We will collaborate and cooperate with each other as we embrace the mission for Catholic school education in the greater Springfield area.

### **Mission Statement**

To advance the mission of the Catholic Church, “to teach as Jesus did”, we promote and ensure that a quality Catholic school education will be available and accessible to any family in the greater Springfield area who chooses a faith-based education for their children, with the intent to serve a diverse student body through the innovation, collaboration and sacrifice of the entire Catholic community.

### **Vision Statement**

The Catholic schools in Springfield have a rich history of service to the local Church and the broader community. To assure their continued presence and viability, the sponsoring parishes, in collaboration with the Diocese, have entered into a comprehensive strategic planning process. As a result of this process, our system of schools will be recognized by the entire Catholic community as a vital component of the Church’s educational mission, and the responsibility of all Catholics.

School and parish leadership commit to creating a system of schools marked by the following characteristics:

- A commitment to strive towards equity and consistency among schools in terms of tuition.
- Involvement of the greater Springfield area Catholic communities in support of Catholic education.
- Expanded reliance on fundraising and stewardship to fund Catholic schools.
- Evangelization of school families to promote active involvement in the mission of the Church.
- Provisions for high quality academic standards, creative programs and extra-curricular activities that are competitive with surrounding schools.
- A strong commitment to a balanced budget every year.
- Less reliance on parish income.
- Stable and growing enrollment at all levels.
- Collaboration among schools.
- Financial assistance for families that need and request it.
- A commitment to maintaining school facilities.
- Standard accounting practices to assure consistency among schools.
- Standardized faculty salaries that reflect their value to the system and promote retention of staff.
- A spirit of unity among all schools, but not uniformity.
- Student graduates who are alive with faith, a love for learning and service to others.

## **Critical Issues**

The Strategic Planning Committee surfaced major assumptions that were accepted as valid truths when discussing the critical issues facing the Springfield Catholic schools. Discussion focused on the change of parents' priorities, and consequently their choices, along with a lack of participation in parish life that is increasingly characteristic of school families today. Major to this discussion were the inequities in tuition costs among Catholic elementary schools in Springfield. This inequity promotes competition among schools and parents. More families are expressing a need for financial assistance. Alternative funding sources are critical if we are to provide support for those who ask for Catholic education for their children. Our schools must continue to provide a program of educational excellence but also provide support programs for students who have diverse educational needs. We need to tell the story of the successes of Catholic education to the broader Springfield community by formally marketing our Catholic schools.

## **Assumptions**

- Parish boundaries are often disregarded in the enrollment of students.
- The overall population in the areas served by our schools is likely to shift locations.
- There is greater competition for Catholic schoolteachers and students from the surrounding schools.
- The current generation of parents has had a shift in priorities and seemingly do not value a Catholic school education as much as prior generations.
- Curriculum and technology will continue to play a critical role in defining academic excellence.
- Athletics and extra curricular activities are a high priority for those we serve, especially at the junior high level.
- New sources of revenue will continue to be a challenge.
- Combining resources among schools will continue to be a need.
- Group marketing is needed to promote Catholic education without causing competition.
- Expenses for maintaining facilities and academic program will increase.
- Realistically, we expect a continued rise in salaries and benefits.
- The variance in tuition costs and the payment of tuition promotes competition among all of our Springfield Catholic schools.
- Safety and security issues are a high priority.
- Numbers of students with special needs will increase and become more diverse.
- Parents expect a quality education in addition to a Catholic education.
- Schools generally require a greater share of parish resources than other parish programs.
- Diversities in family income, in addition to choices and priorities, will generate a greater need for financial assistance in order to attend Catholic Schools.

Additionally, the Strategic Planning Committee formulated a list of mandates, which are *any factors that cannot be changed, and will provide parameters within which the planning process must proceed. They differ from assumptions in that mandates reflect the realities and expressed wishes or expectations of the sponsoring entities (NCEA).*

## **Mandates and Non-Negotiables**

- Catholic elementary education is an essential mission of the Catholic Church in the greater Springfield area.
- We will not fundamentally alter our mission as a Catholic school.

- We will not sacrifice the quality of the educational program
- We will comply with Diocesan policies.
- The Springfield cluster agrees to adhere to the Diocesan salary scale and benefits package for teachers.
- Maintaining a growing enrollment is a key priority for Catholic schools.
- Development plays an integral role in financing our Catholic schools.
- Collaboration is vital and necessary in order for the Catholic schools to survive in the future.

Ultimately, four critical issues were identified from the process of reviewing each school's internal strengths and limitations as well as external opportunities.

### **Critical Issues facing the Springfield Catholic Schools**

- **Enrollment:** need to address attitude and priorities of families, declining population in schools and parishes and parish faith life.
- **Finances:** cost per student versus income/tuition, tuition rates, fundraising, and development.
- **Academics:** Maintaining high quality academic programs and remaining competitive with other schools in all areas of the curriculum.
- **Marketing and public image.**

### **Survey for Catholic Schools**

During the last two weeks of January 2007, a survey for Catholic schools was conducted through an online questionnaire available through [surveymonkey.com](http://surveymonkey.com). This survey was available to all of the schools and parishes within Springfield as well as parishes throughout the Springfield deanery. There were 731 total respondents to this survey. The survey addressed major areas, including religious values, teacher salaries, reasons for choosing or not choosing a Catholic school, alternative models of schools and tuition rates.

A copy of the summarized responses is attached to this plan. 63% of families were in favor of keeping the present K-8 structure of schools, whether it was in single parish or multi-parish schools. Interest in a junior high model was minimal. Catholic schools were chosen for the environment, religious aspect and quality academics. Finances were listed as the major reason for not choosing a Catholic school, along with a lack of programs for special needs children. Most parents demonstrated a lack of understanding regarding the sources of funding for Catholic schools. 55.4% of respondents were willing and able to pay 60% of the actual cost of education in the form of tuition while 44.7% were willing and able to pay more than 60% of the actual cost of education. 81% indicated that the salaries of the Catholic schoolteachers should be substantially increased, whereas only 47% were willing to pay a higher tuition and 52% were willing to increase weekly parish contributions to achieve this goal.

### **Profile of the Catholic Schools in Springfield**

For over one hundred years, Catholic schools have been an important part of parish life in Springfield. Generations of children have benefited from Springfield Catholic schools, through the sacrifice and commitment of parishes, parishioners and parents. For decades, research on Catholic schools has demonstrated that Catholic school graduates are stronger supporters of the Catholic Church than the Catholic population at large. They also academically outperform graduates from most other schools. Current research by CARA and the National Catholic



Education Association continues to confirm these facts. In response, the United States Conference of Catholic Bishops statement that “Catholic schools are the best way to help parents pass on their faith to their children” is still true and motivates our current efforts to strengthen our schools.

### **Population Trends**

Population shifts have significantly affected Catholic schools in Springfield and will continue to do so in the years ahead. A number of parishes in Springfield, with and without schools, have experienced a population decline. Outlying school districts provide alternative choices for quality education, which has decreased population in the Catholic schools.

### **Enrollment Trends**

There are 2,158 students enrolled in the Springfield Catholic elementary schools for the 2006-2007 school year. However, that represents a 21.92% decrease in enrollment from the 1999-2000 school year to the present. Over the past eight years, Springfield Catholic elementary school enrollment declined a total of 606 students.

### **Catholic School Tuition**

There is a tremendous disparity in the tuition charged among the Catholic elementary schools. During the 2006-2007 school year, tuition costs ranged from \$700 to \$2,500 for one child. Four parishes continue to use the “pledge system” as part of their tuition. Thus, this gives the appearance of lower tuition for those four schools, as the pledge is not always honored. Parents are “shopping” for schools with the appearance of a lower tuition rate. According to the USCCB policy entitled *School Tuition versus Donation*:

*Payments made to a parish by parents of children enrolled in a Catholic school may qualify as deductible contributions if they are gifts...specifically enrollment in the school must in no manner be contingent on making the payment; the payment must not be made pursuant to a plan to convert non-deductible tuition into charitable contributions; and the receipt of the benefit (schooling or reduced tuition payments) must not otherwise be dependent upon making the payment. Rev.Rul.83-104, 1983-2C.B.46, cites the following factors as creating a presumption that a payment is NOT a charitable contribution:*

- *The existence of a contract (express or implied) whereby a taxpayer (i.e. parents, etc.) agree to make a “contribution” which insures school admission for the taxpayer’s child;*
- *A plan allowing taxpayers either to pay tuition or make “contributions” in exchange for schooling*
- *The earmarking of contributions for the direct benefit of an individual;*
- *The otherwise unexplained denial of admission/readmission of children of taxpayers who are financially able but do not contribute.*

### **Finances and Facilities**

Many parishes in the area have used or are exhausting their savings to subsidize schools. Some of the Springfield parishes have large outstanding debts to the Diocese, which include, but are not limited, to employee pension costs, employee health insurance, loans and accumulated Annual Catholic Services Appeal assessments. In addition, many schools and parish facilities are aging and in need of repair. Many have deferred necessary maintenance and have limited funds, if any, to address these needs.

A facility audit for the Springfield Catholic schools completed by Gerald Glaus, Sr. in December 2006 indicated that the schools are “well taken care of”. He commends the schools on a job well done. However, Mr. Glaus cautions that delayed maintenance costs a lot more at a later date. His recommendations included the implementation of a preventative maintenance program and the development of a facility master plan for addressing educational needs at each facility.

### **Parish Trends**

Declining populations and various ministries within parishes has placed growing pressure on limited parish finances. This, in turn, has compounded the financial dilemma facing Catholic schools, increasing pressure to collaborate with one another, to share resources and to identify new sources of revenue.

### **Impact of Status Quo**

The traditional approach to school sponsorship may no longer be feasible for some parishes. Academic quality, Catholic identity and financial stability will depend upon new collaboration among schools, parishes and the diocese. A parochial mindset where all decisions and responsibility are local will no longer be appropriate for the Springfield area Catholic elementary schools. There needs to be a shift to a “systems approach” that recognizes that Catholic schools are the responsibility of the entire Catholic community (USCCB 1990) and acknowledges the need for ongoing collaboration, in order to maximize limited resources. Without such a paradigm shift, it is quite possible that a number of schools will simply be forced to close within the next five years.

### **Summary Statement**

During the next five years, the Springfield Catholic schools commit to the goals and objectives outlined in this strategic plan. We will collaborate with one another and move toward a “systems approach” for the operation of the elementary schools. Study and evaluation of the data provided by each school regarding school enrollment, parish statistics and mass attendance and the finances for each school/parish have resulted in the decision to look at a possible restructuring of the Catholic elementary schools.

The data suggests that not all of the current elementary schools will survive over the next five years. This “right sizing” may reduce the number of Catholic schools in Springfield. It may be more realistic that five or six Catholic elementary schools would serve the Springfield area families. Our intent is to stabilize and increase the number of students attending Catholic elementary schools.

We will work toward financially sound schools by moving to comparable tuition costs, standardizing budgeting and reporting methods and increasing development efforts and outside sources of revenue. We will strengthen the curriculum in each school by aligning subject areas with the Illinois Learning Standards and increasing professional development opportunities for our staffs. We will provide for a differentiated curriculum to serve the varied and increasing needs of our students.

We will market the Springfield area Catholic schools with a united voice. We will promote the Catholic identity and academic excellence that Catholic elementary schools provide in Springfield.

## **Strategic Plan Recommendations**

### Goals to Address Critical Issues

#### Academic Goals

1. We will strengthen the existing high-quality academic curriculum.
2. We will strive to meet the needs of a diverse student population.
3. We will promote professional development for staff.
4. We will collaborate and share academic resources among schools.

#### Enrollment Goals

1. We will determine the structure of elementary education in the Springfield Catholic schools.
2. We will cooperate in strengthening enrollment in Catholic elementary schools in the Springfield cluster.

#### Finance Goals

1. We will become financially stable and solvent in all of the elementary schools.
2. We will establish guidelines for comparable tuition rates and parish support.
3. We will move from the pledge system to tuition within three years.
4. We will follow standardized budgeting practices and financial reporting in all of the elementary schools.

#### Marketing Goals

1. We will establish a Catholic elementary school marketing committee.
2. We will institute a development program in each of the elementary schools.
3. We will explore use of existing resources for marketing and public relations.
4. We will commit to a budget line item for marketing expenses in all elementary schools.

## **Year One Operational Plan Objectives for 2007-2008**

### **Academics**

1. Ensure that our religion and sacramental preparation programs reflect the National Directory for Catechesis. (pastors, principals, teachers, director of religious education in each parish)
2. Align math and technology curriculum areas with Illinois Learning Standards by thoroughly studying curriculum goals, teacher approaches, textbooks used and Catholic high school standards. (representative principals and teachers)
3. Plan a joint workshop day for Catholic elementary schools about differentiating instruction for special needs and accelerated learners. (principals)
4. Meet with individual teachers to set professional goals and to plan personal professional development for the school year. (principals)
5. Begin collaboration by sharing email addresses of all teachers and their grade levels and/or subject specialties. (technology person from each school)
6. Maximize use of technology within curriculum areas. (principals and teachers)

### **Enrollment**

1. Form a committee to reconfigure or “right size” our schools by May 2007. (steering group of strategic planning committee)
2. Appoint PR representation to communicate stages of planning by July 2007. (steering committee)
3. Establish a plan to reconfigure the Springfield area Catholic elementary schools that will include reducing the number of schools or “rightsizing” by January 31, 2008. (representation from planning committee, representative from Office for Catholic Education, representative from the Diocesan Finance Office and Bishop Lucas or his delegate)
4. Study and track the demographics of the areas where our Springfield Catholic elementary schools are located. (volunteers from each school)
5. Develop common registration approaches and timelines for enrollment. (pastors and principals)
6. Host an open house at each school in the spring of 2008. (principals)

### **Finances**

1. Develop a standardized form for budgeting and reporting along with a standardized chart of accounts (including sub-accounts and account descriptions) by May 1, 2007. (Strategic Planning Committee finance sub-committee)
2. Train school/parish bookkeepers, principals and any necessary finance personnel by June 15, 2007. ( Diocesan Finance Office)
3. Implement new budgeting and reporting formats for the 2007-2008 school year. (pastors and principals)
4. Create a yearly fundraising calendar for the Catholic elementary schools in cooperation with the Catholic high schools. (principals)
5. Begin the three-year process of eliminating the pledge system by increasing direct-paid tuition and decreasing the required/suggested pledge amounts in the four parishes using the parental pledge system for tuition. (pastors, principals, finance committees)
6. Educate parents and parishioners about the actual cost of education versus tuition and other related financial information. (pastors, principals, finance committees)
7. Report the cost of admission in the same manner (includes tuition, any pledge amount and fees) by August 1, 2007.

## **Marketing**

1. Establish a marketing council by appointing two representatives or development director from each school by September 1, 2007. (pastors and principals)
2. Establish responsibilities and accountability for council. (representative pastors and principals and the marketing council)
3. Develop "bare bones" marketing plan for implementation in Year 1. (marketing council)
4. Budget for first year efforts. (pastors, principals, finance council, school board)
5. Dedicate one employee at each school for development. (pastors and principals)
6. Establish a development program for the Catholic schools. (marketing council)
7. Provide guidelines for development budgeting, i.e. cost per capita, cost per family, flat rate, etc. (marketing council)
8. Plan to fund development in the 2008 fiscal year with a line item written into budget. (pastors, principals, school board, finance council)
9. Work together to continue joint advertising campaigns (i.e. billboards, radio/TV spots or commercials, newspaper ads, etc.) to promote Catholic education. (marketing council)
10. Determine marketing themes and key messages to be used by all schools. (marketing council)
11. Market the quality educational programs available in Catholic schools and the benefits (both extrinsic and intrinsic) of teaching in Catholic schools in recruiting and retaining quality educators. (marketing council)

## **Year Two Operational Plan Objectives for 2008-2009**

### **Academics**

1. Promote Catholic identity through increased family participation in the religion program. (pastors, principals, teachers, director of religious education in each parish)
2. Align language arts and art curriculum areas with Illinois Learning Standards by thoroughly studying curriculum goals, teacher approaches, textbooks used and Catholic high school standards. (representative principals and teachers)
3. Provide a joint workshop day to assess progress of the use of differentiated instruction and continue education about differentiated instruction. (principals)
4. Continue teacher goal setting and focus on areas of individual teacher need. (principals)
5. Share professional development resources among principals/schools (tapes, workshops, speakers, professional literature, etc.). (librarian/appointed teacher in each school)
6. Maximize use of technology within curriculum areas. (principals and teachers)

### **Enrollment**

1. Provide necessary support for the reconfigured schools. (Bishop Lucas, pastors, principals, Diocesan personnel and school boards)
2. Form an enrollment committee. (one representative from each school)
3. Implement a citywide open house event for all of the Catholic elementary schools on the same date. (Enrollment committee, principals, faculty, school board)
4. Study and track the demographics of the areas where our Springfield Catholic elementary schools are located. (volunteers from each school)
5. Begin communicating each year with parish families at the time of a child's baptism. (enrollment representative from each school)

### **Finances**

1. Continue the three-year process of eliminating the pledge system by increasing direct-paid tuition and decreasing the required/suggested pledge amounts in the four parishes using the parental pledge system for tuition. (pastors, principals, finance committees)
2. Educate parents and parishioners about the actual cost of education versus tuition and other related financial information. (pastors, principals, finance committees)
3. Create a formula for tuition assistance among all elementary schools. (pastors, principals, finance committees)
4. Standardize the procedures used when families apply for tuition subsidy. (pastors, principals, finance committees)
5. Create a formula for multiple child tuition rates among all elementary schools. (pastors, principals, finance committees)
6. Adopt reciprocal uniform employee tuition discount among the Catholic elementary schools to be applied to employees' children attending any of the Springfield Catholic elementary schools.
7. Establish a yearly joint fundraising event for tuition assistance among all elementary schools. (principals, development representatives from each school)
8. Institute 50-40-10 guidelines for revenue. (pastors, principals, finance committee)
9. Investigate consortium buying among the elementary schools. (assigned representative from each school)

## **Marketing**

1. Research other Catholic school marketing plans. (marketing council)
2. Write comprehensive marketing plan for Catholic education in Springfield.(marketing council)
3. Determine target populations for marketing. (marketing council)
4. Focus on the growth of the annual fund in each school through development efforts. (marketing council)
5. Solicit help from the Diocesan Office for Catholic Education. (marketing council)
6. Prepare marketing packets for realty offices, Chamber of Commerce, Newcomers Club, etc.(marketing council)
7. Focus on business partnerships with vendors and Catholic constituents to fund marketing efforts. (marketing council)
8. Work together to continue joint advertising campaigns (i.e. billboards, radio/TV spots or commercials, newspaper ads, etc.) to promote Catholic education. (marketing council)
9. Determine marketing themes and key messages to be used by all schools. (marketing council)
10. Market the quality educational programs available in Catholic schools and the benefits (both extrinsic and intrinsic) of teaching in Catholic schools in recruiting and retaining quality educators. (marketing council)

## **Year Three Operational Plan Objectives for 2009-2010**

### **Academics**

1. Promote Catholic identity by focusing on school family involvement in parish life. (pastors, principals, teachers, director of religious education in each parish)
2. Align religion and music curriculum areas with Illinois Learning Standards by thoroughly studying curriculum goals, teacher approaches, textbooks used and Catholic high school standards. (representative principals and teachers)
3. Provide teachers with a professional development day to observe their teaching areas in Catholic elementary and high schools in light of differentiated instruction. (principals)
4. Provide a joint workshop day(s) for catechetical formation and faith development of our staffs. (principals, Diocesan personnel)
5. Focus on sharing opportunities for academic enrichment (speakers, assemblies, field trips, etc.) for the students. (principals)
6. Maximize use of technology within curriculum areas. (principals and teachers)

### **Enrollment**

1. Develop a plan for increasing enrollment. (Enrollment committee)
2. Dialog with PSR families in each parish and in parishes without schools. (Enrollment committee and principals)
3. Dialog with existing families of middle school students regarding enrollment retention. (Enrollment committee and principals)
4. Study and track the demographics of the areas where our Springfield Catholic elementary schools are located. (Enrollment committee)
5. Sponsor a citywide open house event for all of the Catholic elementary schools on the same date. (Enrollment committee, principals, faculty, school board)

### **Finances**

1. Complete the three-year process of eliminating the pledge system by increasing direct-paid tuition and decreasing the required/suggested pledge amounts in the four parishes using the parental pledge system for tuition. (pastors, principals, finance committees)
2. Educate parents and parishioners about the actual cost of education versus tuition and other related financial information. (pastors, principals, finance committees)
3. Implement a formula for tuition assistance among all elementary schools. (pastors, principals, finance committees)
4. Implement the standardized procedures used when families apply for tuition subsidy.
5. Implement a formula for multiple child tuition rates among all elementary schools. (pastors, principals, finance committees)
6. Begin implementation of consortium buying. (assigned representative from each school)
7. Establish guidelines to reach comparable tuition costs. (pastors, principals, finance committee)
8. Explore ways of decreasing costs of education. (assigned personnel from each school)



## **Marketing**

1. Target new populations for marketing. (marketing council)
2. Measure results of marketing and development efforts by using enrollment numbers and annual fund numbers. (marketing council)
3. Review original scope of marketing and compare to actual tasks completed. (marketing council)
4. Re-work marketing plan for the following school year. (marketing council)
5. Focus on grant writing in development efforts. (marketing council)
6. Work together to continue joint advertising campaigns (i.e. billboards, radio/TV spots or commercials, newspaper ads, etc.) to promote Catholic education. (marketing council)
7. Determine marketing themes and key messages to be used by all schools. (marketing council)
8. Market the quality educational programs available in Catholic schools and the benefits (both extrinsic and intrinsic) of teaching in Catholic schools in recruiting and retaining quality educators. (marketing council)

## **Year Four Operational Plan Objectives for 2010-2011**

### **Academics**

1. Promote Catholic identity through student involvement in community service opportunities. (pastors, principals, teachers, director of religious education in each parish)
2. Align science and physical education curriculum areas with Illinois Learning Standards by thoroughly studying curriculum goals, teacher approaches, textbooks used and Catholic high school standards. (representative principals and teachers)
3. Provide an articulation day for teachers to share ideas about practicing differentiated instruction in their classrooms/subject areas. (principals)
4. Each school will provide a workshop experience for catechetical formation and faith development of our staffs. (principals, Diocesan personnel)
5. Provide a joint assembly for the junior high students on a relevant topic. (principals and junior high teachers)
6. Maximize use of technology within curriculum areas. (principals and teachers)

### **Enrollment**

1. Work toward optimal enrollment for each school. (Enrollment committee)
2. Conduct an enrollment drive throughout the Springfield Deanery. (Enrollment committee)
3. Reach out to those who are seeking a faith-based education. (Enrollment committee)
4. Investigate recruiting activities to be used to increase enrollment. (Enrollment committee)
5. Sponsor a citywide open house event for all of the Catholic elementary schools on the same date. (Enrollment committee, principals, faculty, school board)

### **Finances**

1. Educate parents and parishioners about the actual cost of education versus tuition and other related financial information. (pastors, principals, finance committees)
2. Establish guidelines to reach comparable tuition costs. (pastors, principals, finance committee)
3. Work with the development council to investigate an endowment for all elementary schools. (development council, finance committees)
4. Work toward a Deanery-wide Catholic education appeal to benefit elementary and high schools. (pastors, principals, Diocesan personnel, development council)
5. Explore ways to supplement teachers' salaries. (pastors, principals)
6. Investigate long-term facility budgeting. (pastors, principals, finance committees)

### **Marketing**

1. Marketing Council becomes Development Council.
2. Investigate the establishment of a common endowment fund for all elementary schools. (development council)
3. Focus on planned giving and memorial gifts in development efforts. (development council)
4. Work together to continue joint advertising campaigns (i.e. billboards, radio/TV spots or commercials, newspaper ads, etc.) to promote Catholic education. (development council)
5. Determine marketing themes and key messages to be used by all schools. (development council)
6. Market the quality educational programs available in Catholic schools and the benefits (both extrinsic and intrinsic) of teaching in Catholic schools in recruiting and retaining quality educators. (development council)

## **Year Five Operational Plan Objectives for 2011-2012**

### **Academics**

1. Promote Catholic identity by increasing support of mission countries. (pastors, principals, teachers, director of religious education in each parish)
2. Align social studies curriculum areas with Illinois Learning Standards by thoroughly studying curriculum goals, teacher approaches, textbooks used and Catholic high school standards. (representative principals and teachers)
3. Assess and evaluate the program for differentiated instruction in light of personnel needs. (principals)
4. Assess and evaluate the progress in curriculum alignment in all subject areas. (principals and teachers of all schools)
5. Assess and evaluate the collaboration and sharing of academic resources. (principals and teachers )
6. Maximize use of technology within curriculum areas. (principals and teachers)

### **Enrollment**

1. Implement a recruiting strategy. (Enrollment committee, school board)
2. Sponsor a citywide open house event for all of the Catholic elementary schools on the same date. (enrollment committee, principals, faculty, school board)
3. Evaluate the demographics of the areas where our Springfield Catholic elementary schools are located. (enrollment committee)
4. Provide monetary incentives for our own families who refer new students for enrollment. (pastor, principal and finance committee)

### **Finances**

1. Educate parents and parishioners about the actual cost of education versus tuition and other related financial information. (pastors, principals, finance committees)
2. Follow guidelines to reach comparable tuition costs. (pastors, principals, finance committee)
3. Establish an endowment for all elementary schools. (development council)
4. Dialog with the Diocese regarding support and financial assistance for the schools. (pastors, principals, school board)
5. Implement long-term facility budgeting. (pastors, principals, finance committees)

### **Marketing**

1. Evaluate development efforts of the annual fund, endowment, grant writing, planned giving and memorial gifts. (development council)
2. Evaluate and revise as needed the marketing plan. (development council)
3. Determine marketing themes and key messages to be used by all schools. (development council)
4. Work together to continue joint advertising campaigns (i.e. billboards, radio/TV spots or commercials, newspaper ads, etc.) to promote Catholic education. (development council)
5. Market the quality educational programs available in Catholic schools and the benefits (both extrinsic and intrinsic) of teaching in Catholic schools in recruiting and retaining quality educators. (development council)

## **Appendix A**

### **Operational Plan Organized by Critical Issues**

#### **Academics**

##### 2007-2008

1. Ensure that our religion and sacramental preparation programs reflect the National Directory for Catechesis. (pastors, principals, teachers, director of religious education in each parish)
2. Align math and technology curriculum areas with Illinois Learning Standards by thoroughly studying curriculum goals, teacher approaches, textbooks used and Catholic high school standards. (representative principals and teachers)
3. Plan a joint workshop day for Catholic elementary schools about differentiating instruction for special needs and accelerated learners. (principals)
4. Meet with individual teachers to set professional goals and to plan personal professional development for the school year. (principals)
5. Begin collaboration by sharing email addresses of all teachers and their grade levels and/or subject specialties. (technology person from each school)
6. Maximize use of technology within curriculum areas. (principals and teachers)

##### 2008-2009

1. Promote Catholic identity through increased family participation in the religion program. (pastors, principals, teachers, director of religious education in each parish)
2. Align language arts and art curriculum areas with Illinois Learning Standards by thoroughly studying curriculum goals, teacher approaches, textbooks used and Catholic high school standards. (representative principals and teachers)
3. Provide a joint workshop day to assess progress of the use of differentiated instruction and continue education about differentiated instruction. (principals)
4. Continue teacher goal setting and focus on areas of individual teacher need. (principals)
5. Share professional development resources among principals/schools (tapes, workshops, speakers, professional literature, etc.). (librarian/appointed teacher in each school)
6. Maximize use of technology within curriculum areas. (principals and teachers)

##### 2009-2010

1. Promote Catholic identity by focusing on school family involvement in parish life. (pastors, principals, teachers, director of religious education in each parish)
2. Align religion and music curriculum areas with Illinois Learning Standards and/or Diocesan guidelines by thoroughly studying curriculum goals, teacher approaches, textbooks used and Catholic high school standards. (representative principals and teachers)
3. Provide teachers with a professional development day to observe their teaching area in Catholic elementary and high schools in light of differentiated instruction. (principals)
4. Provide a joint workshop day(s) for catechetical formation and faith development of our staffs. (principals, Diocesan personnel)
5. Focus on sharing opportunities for academic enrichment (speakers, assemblies, field trips, etc.) for the students. (principals)
6. Maximize use of technology within curriculum areas. (principals and teachers)

##### 2010-2011

1. Promote Catholic identity through student involvement in community service opportunities. (pastors, principals, teachers, director of religious education in each parish)

2. Align science and physical education curriculum areas with Illinois Learning Standards by thoroughly studying curriculum goals, teacher approaches, textbooks used and Catholic high school standards. (representative principals and teachers)
3. Provide an articulation day for teachers to share ideas about practicing differentiated instruction in their classrooms/subject areas. (principals)
4. Sponsor a workshop experience at each school for catechetical formation and faith development of the staff. (principals, Diocesan personnel)
5. Provide a joint assembly for the junior high students on a relevant topic. (principals and junior high teachers)
6. Maximize use of technology within curriculum areas. (principals and teachers)

#### 2011-2012

1. Promote Catholic identity by increasing support of mission countries. (pastors, principals, teachers, director of religious education in each parish)
2. Align social studies curriculum areas with Illinois Learning Standards by thoroughly studying curriculum goals, teacher approaches, textbooks used and Catholic high school standards. (representative principals and teachers)
3. Assess and evaluate the program for differentiated instruction in light of personnel needs. (principals)
4. Assess and evaluate the progress in curriculum alignment in all subject areas. (principals and teachers of all schools)
5. To provide a joint program for parents on a relevant topic. (principals and teachers )
6. Maximize use of technology within curriculum areas. (principals and teachers)

## Enrollment

### 2007-2008

1. Form a committee to reconfigure or “right size” our schools by May 2007 (steering group of strategic planning committee)
2. Appoint PR representation to communicate stages of planning by July 2007. (steering committee)
3. Establish a plan to reconfigure the Springfield area Catholic elementary schools that will include reducing the number of schools or “rightsizing” by January 31, 2008. (representation from planning committee, representative from Office for Catholic Education, representative from the Diocesan Finance Office and Bishop Lucas or his delegate)
4. Study and track the demographics of the areas where our Springfield Catholic elementary schools are located. (volunteers from each school)
5. Develop common registration approaches and timelines for enrollment (pastors and principals)
6. Host an open house at each school in the spring of 2008. (principals)

### 2008-2009

1. Provide necessary support for the reconfigured schools. (Bishop Lucas, pastors, principals, Diocesan personnel and school boards)
2. Form an enrollment committee. (one representative from each school)
3. Implement a citywide open house event for all of the Catholic elementary schools on the same date. (enrollment committee, principals, faculty, school board)
4. Study and track the demographics of the areas where our Springfield Catholic elementary schools are located. (volunteers from each school)
5. Begin communicating each year with parish families at the time of a child’s baptism. (enrollment representative from each school)

### 2009-2010

1. Develop a plan for increasing enrollment. (Enrollment committee)
2. Dialog with PSR families in each parish and in parishes without schools. (enrollment committee and principals)
3. Dialog with existing families of middle school students regarding enrollment retention. (enrollment committee and principals)
4. Study and track the demographics of the areas where our Springfield Catholic elementary schools are located. (enrollment committee)
5. Sponsor a citywide open house event for all of the Catholic elementary schools on the same date. (enrollment committee, principals, faculty, school board)

### 2010-2011

1. Work toward optimal enrollment for each school. (enrollment committee)
2. Conduct an enrollment drive throughout the Springfield Deanery. (enrollment committee)
3. Reach out to those who are seeking a faith-based education. (enrollment committee)
4. Investigate recruiting activities to be used to increase enrollment. (enrollment committee)
5. Sponsor a citywide open house event for all of the Catholic elementary schools on the same date. (enrollment committee, principals, faculty, school board)

2011-2012

1. Implement a recruiting strategy. (enrollment committee, school board)
2. Sponsor a citywide open house event for all of the Catholic elementary schools on the same date. (enrollment committee, principals, faculty, school board)
3. Evaluate the demographics of the areas where our Springfield Catholic elementary schools are located. (enrollment committee)
4. Provide monetary incentives for our own families who refer new students for enrollment. (pastor, principal and finance committee)

## Finances

### 2007-2008

1. Develop a standardized form for budgeting and reporting along with a standardized chart of accounts (including sub-accounts and account descriptions) by May 1, 2007 (Strategic Planning Committee finance sub-committee)
2. Train school/parish bookkeepers, principals and any necessary finance personnel by June 15, 2007 ( Diocesan Finance Office)
3. Implement new budgeting and reporting formats for the 2007-2008 school year. (pastors and principals)
4. Create a yearly fundraising calendar for the Catholic elementary schools in cooperation with the Catholic high schools. (principals)
5. Begin the three-year process of eliminating the pledge system by increasing direct-paid tuition and decreasing the required/suggested pledge amounts in the four parishes using the parental pledge system for tuition. (pastors, principals, finance committees)
6. Educate parents and parishioners about the actual cost of education versus tuition and other related financial information. (pastors, principals, finance committees)
7. Report the cost of admission in the same manner (includes tuition, any pledge amount and fees) by August 1, 2007.

### 2008-2009

1. Continue the three-year process of eliminating the pledge system by increasing direct-paid tuition and decreasing the required/suggested pledge amounts in the four parishes using the parental pledge system for tuition. (pastors, principals, finance committees)
2. Educate parents and parishioners about the actual cost of education versus tuition and other related financial information. (pastors, principals, finance committees)
3. Create a formula for tuition assistance among all elementary schools. (pastors, principals, finance committees)
4. Standardize the procedures used when families apply for tuition subsidy. (pastors, principals, finance committees)
5. Create a formula for multiple child tuition rates among all elementary schools. (pastors, principals, finance committees)
6. Adopt reciprocal uniform employee tuition discount among the Catholic elementary schools to be applied to employees' children attending any of the Springfield Catholic elementary schools.
7. Establish a yearly joint fundraising event for tuition assistance among all elementary schools. (principals, development representatives from each school)
8. Institute 50-40-10 guidelines for revenue. (pastors, principals, finance committee)
9. Investigate consortium buying among the elementary schools. (assigned representative from each school)



#### 2009-2010

1. Complete the three-year process of eliminating the pledge system by increasing direct-paid tuition and decreasing the required/suggested pledge amounts in the four parishes using the parental pledge system for tuition. (pastors, principals, finance committees)
2. Educate parents and parishioners about the actual cost of education versus tuition and other related financial information. (pastors, principals, finance committees)
3. Implement a formula for tuition assistance among all elementary schools. (pastors, principals, finance committees)
4. Implement the standardized procedures used when families apply for tuition subsidy.
5. Implement a formula for multiple child tuition rates among all elementary schools. (pastors, principals, finance committees)
6. Begin implementation of consortium buying. (assigned representative from each school)
7. Establish guidelines to reach comparable tuition costs. (pastors, principals, finance committee)
8. Explore ways of decreasing costs of education. (assigned personnel from each school)

#### 2010-2011

1. Educate parents and parishioners about the actual cost of education versus tuition and other related financial information. (pastors, principals, finance committees)
2. Establish guidelines to reach comparable tuition costs. (pastors, principals, finance committee)
3. Work with the Development Council to investigate an endowment for all elementary schools. (development council, finance committees)
4. Work toward a Deanery-wide Catholic education appeal to benefit elementary and high schools. (pastors, principals, Diocesan personnel, development council)
5. Explore ways to supplement teachers' salaries. (pastors, principals)
6. Investigate long-term facility budgeting. (pastors, principals, finance committees)

#### 2011-2012

1. Educate parents and parishioners about the actual cost of education versus tuition and other related financial information. (pastors, principals, finance committees)
2. Follow guidelines to reach comparable tuition costs. (pastors, principals, finance committee)
3. Establish an endowment for all elementary schools. (development council)
4. Dialog with the Diocese regarding support and financial assistance for the schools. (pastors, principals, school board)
5. Implement long-term facility budgeting. (pastors, principals, finance committees)

## Marketing

### 2007-2008

1. Establish a marketing council by appointing two representatives or development director from each school by September 1, 2007. (pastors and principals)
2. Establish responsibilities and accountability for council. (representative pastors and principals and the marketing council)
3. Develop "bare bones" marketing plan for implementation in Year 1. (marketing council)
4. Budget for first year efforts. (pastors, principals, finance council, school board)
5. Dedicate one employee at each school for development. (pastors and principals)
6. Establish a development program for the Catholic schools. (marketing council)
7. Provide guidelines for development budgeting, i.e. cost per capita, cost per family, flat rate, etc. (marketing council)
8. Plan to fund development in the 2008 fiscal year with a line item written into budget. (pastors, principals, school board, finance council)
9. Work together to continue joint advertising campaigns (i.e. billboards, radio/TV spots or commercials, newspaper ads, etc.) to promote Catholic education. (marketing council)
10. Determine marketing themes and key messages to be used by all schools. (marketing council)
11. Market the quality educational programs available in Catholic schools and the benefits (both extrinsic and intrinsic) of teaching in Catholic schools in recruiting and retaining quality educators. (marketing council)

### 2008-2009

1. Research other Catholic school marketing plans. (marketing council)
2. Write comprehensive marketing plan for Catholic education in Springfield. (marketing council)
3. Determine target populations for marketing. (marketing council)
4. Focus on the growth of the annual fund in each school through development efforts.
5. Solicit help from the Diocesan Office for Catholic Education. (marketing council)
6. Prepare marketing packets for realty offices, Chamber of Commerce, Newcomers Club, etc. (marketing council)
7. Focus on business partnerships with vendors and Catholic constituents to fund marketing efforts. (marketing council)
8. Work together to continue joint advertising campaigns (i.e. billboards, radio/TV spots or commercials, newspaper ads, etc.) to promote Catholic education. (marketing council)
9. Determine marketing themes and key messages to be used by all schools. (marketing council)
10. Market the quality educational programs available in Catholic schools and the benefits (both extrinsic and intrinsic) of teaching in Catholic schools in recruiting and retaining quality educators. (marketing council)

#### 2009-2010

1. Target new populations for marketing. (marketing council)
2. Measure results of marketing and development efforts by using enrollment numbers and annual fund numbers. (marketing council)
3. Review original scope and compare to actual tasks completed. (marketing council)
4. Re-work marketing plan for the following school year .(marketing council)
5. Focus on grant writing in development efforts. (marketing council)
6. Work together to continue joint advertising campaigns (i.e. billboards, radio/TV spots or commercials, newspaper ads, etc.) to promote Catholic education. (marketing council)
7. Determine marketing themes and key messages to be used by all schools. (marketing council)
8. Market the quality educational programs available in Catholic schools and the benefits (both extrinsic and intrinsic) of teaching in Catholic schools in recruiting and retaining quality educators. (marketing council)

#### 2010-2011

1. Marketing Council becomes Development Council.
2. Investigate the establishment of a common endowment fund for all elementary schools. (development council)
3. Focus on planned giving and memorial gifts in development efforts. (development council)
4. Work together to continue joint advertising campaigns (i.e. billboards, radio/TV spots or commercials, newspaper ads, etc.) to promote Catholic education. (development council)
5. Determine marketing themes and key messages to be used by all schools. (development council)
6. Market the quality educational programs available in Catholic schools and the benefits (both extrinsic and intrinsic) of teaching in Catholic schools in recruiting and retaining quality educators. (development council)

#### 2011-2012

1. Evaluate development efforts of the annual fund, endowment, grant writing, planned giving and memorial gifts. (development council)
2. Evaluate and revise as needed the marketing plan. (development council)
3. Determine marketing themes and key messages to be used by all schools. (development council)
4. Work together to continue joint advertising campaigns (i.e. billboards, radio/TV spots or commercials, newspaper ads, etc.) to promote Catholic education. (development council)
5. Market the quality educational programs available in Catholic schools and the benefits (both extrinsic and intrinsic) of teaching in Catholic schools in recruiting and retaining quality educators. (development council)