



STRATEGIC PLANNING FOR CATHOLIC SCHOOLS

Kick-Off Event Agenda

Date: Thursday, March 1, 2018
Time: 2:00 to 4:00 p.m.
Location: Diocese of Des Moines Pastoral Center

1. Prayer and welcome.
2. Introduction of planning background.
3. Presentation of the planning objectives and process.
4. Questions and clarification.
5. Small group dialog.
 - *List one or two key issues the plan for Catholic schools needs to address at this point in history for schools to be healthy and viable long term.*
 - *If you had the resources and support, what unique opportunities do you see for the future of your school or the schools in your area?*
 - *What factors are most important to excite people about the future of Catholic education in the Diocese of Des Moines?*
6. Large group feedback.
7. Summary observations about issues and opportunities.
8. Next steps in process.
9. Closing prayer.

Objectives

The overall objective is to develop a strategic long-range plan that will guide the diocese, parishes and schools in sustaining the mission of Catholic school education and growing that mission where opportunities are present. The plan developed at the diocesan level will be a guide for planning at the local school level. At the end of the process, local schools will be able to use the diocesan plan as a blueprint for developing their own strategic plan; and local planning will proceed in harmony within a larger diocesan vision.

1. **Promote an understanding and acceptance of the vital and significant role Catholic schools play in enabling the Church to fulfill its mission to pass on the faith to young people, cultivate future leaders, and form a Catholic worldview in them.**

Interviews and consultation with individuals and groups within the diocese will identify the current level of understanding and appreciation for the importance and value of Catholic schools to the Church and society. Strategies will be developed to broaden and strengthen this understanding and appreciation.

2. **Develop strategies to strengthen and sustain Catholic identity.**

Catholic identity is reflected in many elements in a school such as the personal faith expression of faculty, community environment, religious education, academics, service opportunities and in many other ways. A diocesan vision supported by programs and services at the diocesan level can expand the abilities of local leaders to strengthen the Catholic identity of their particular school and more effectively teach the Gospel and evangelize our culture.

3. **Study the present and projected demographic trends affecting Catholic elementary and secondary schools in the Diocese of Des Moines.**

Study the historical, current and projected population in each of the regions in the diocese and assess the makeup and number of children that could be served by Catholic schools now and in the future. Examine both external demographics in the community and internal demographics in parishes and schools. Bring to light the implications demographics have for school mission and school viability.

4. **Analyze enrollment trends and attendance patterns for existing Catholic elementary and secondary schools.**

Evaluate enrollment potential, particularly in areas where population change has occurred or is expected to occur. Consider factors that influence potential enrollment such as competition, marketing, program offerings, tuition cost and transportation. Evaluate how changes in demographics in the larger community and in parishes will affect Catholic school enrollments.

5. **Articulate a vision for the future of Catholic schools. The vision should articulate the expectations for a viable Catholic school and it should give a picture of what Catholic schools should be in the next ten years and beyond.**

A statement of a desired future for Catholic schools will become the basis for the plan. The vision will be refined as the plan is developed. It should serve to challenge and stretch the thinking of Catholic leaders. The vision statement will be used to solicit support and create discussions among various constituencies. The vision will have to be sensitive to the unique circumstances of rural, suburban, and city schools within the diocese.

6. **Evaluate the number, location and structure of Catholic elementary schools that will be needed and can be viable for the long term.**

Evaluate situations in each region of the diocese recognizing the history and uniqueness of each region. Examine the current model/structure of elementary schools and determine the viability of traditional models. Recommend new models if there is a compelling case to do so. Study the use of facilities to realize prudent financial stewardship and support quality Catholic education. With participation from the Catholic Schools Office, local pastors and local school leaders, make specific recommendations. Focus on the sustainability of the small, rural schools.

7. **Develop a diocesan funding plan that will improve financial viability for Catholic schools. Move schools to a model where all will be able to operate with balanced budgets that fund a future vision. This means addressing just and competitive salaries and benefits, investment in academic quality, successful development/ advancement programs, and realistic support from parishes.**

Finances are a major concern for schools and their sponsoring parishes. Examination of the current funding paradigm will be used to help decision-makers understand the strengths and weaknesses. As the plan is developed, recommendations will emerge that either preserve or refine the current model and/or propose new models.

Issues to be examined include:

- What could the best funding model of the future for schools look like? What is the best approach to balancing tuition, parish investment, diocesan support, and third source income to sustain schools?
- How should fundraising and development programs change to meet the needs of the future?
- How do schools and parishes grow revenue to keep pace with increasing expenses, pay competitive salaries and make new investments in Catholic school education?
- How will tuition assistance be funded and strategically distributed to ensure Catholic schools are accessible to students from all economic groups?

8. Evaluate current models of governance and determine where these models will be viable or not viable for the long term. Propose new governance models when and where necessary.

Study the governance models in use and evaluate their strengths and weaknesses. Recommend improvements to the current model and/or recommend new governance models when there is a compelling case that a new model will better assure long-term success and viability of schools. When appropriate, consider alternative governance structures that have been used effectively in other dioceses around the country.

9. Develop strategies to strengthen the quality of the academic and co-curricular programs in Catholic schools for Pre-Kindergarten through 12th grade.

Important elements of academic excellence include: type, scope and quality of academic and co-curricular opportunities, rigor of the curriculum, quality of teaching, availability and use of educational resources, integrated use of technology and ability to successfully meet a broad range of student abilities. Strengths and challenges in these areas will be identified and recommendations will be made that can be acted upon throughout the diocese.

The consultants will rely on the Catholic Schools Office to provide the necessary data and current assessment of the condition of educational programs.

10. Provide direction for local schools in completing their school strategic plans within the vision, context and goals of the diocesan strategic plan.

Supporting the planning process at the individual schools through the diocesan strategic planning process will help provide focus and additional direction that will assist the schools in completing or providing greater breadth and depth in their planning processes.

11. Develop the plan through a process that involves key stakeholders at a local and diocesan level to achieve ownership and commitment to implementation of the plan.

Support the planning process with a comprehensive public relations and communications effort. Work to educate the Catholic community about Catholic schools and the importance of their mission. Through the process, involve pastors, principals, diocesan leaders, major donors, and local parish and school leaders. Create a wide understanding of the issues and facts as well as an understanding of the proposed plan, particularly among persons in leadership or positions of influence. Build ownership and gain wisdom by seeking input as the plan is formed.

12. Approach the planning process prayerfully and in a manner that seeks to accomplish God's will for the ministry of Catholic schools in the Diocese of Des Moines.

Planning Process

The planning process will have the following elements:

1. Conduct a demographics study of the population as it affects school enrollment. Look specifically at the demographics of the Catholic population.
2. Conduct interviews and visits to schools to learn the present state of Catholic schools and uncover possibilities for the future. Engage local leaders in the discussions.
3. Study enrollment and evaluate potential for Catholic schools.
4. Compile and analyze financial data for each school.
5. Establish a planning committee and steering committee to guide development of the plan and provide leadership for the process.
6. Establish a vision for healthy Catholic schools in the Diocese of Des Moines.
7. Present key findings from the study of schools and the data collected to understand the strategic issues schools are facing.
8. Develop the strategic plan with goals and strategies. Go through several rounds of critique and edit as various groups are consulted.
9. Develop an implementation plan with action steps and timeline. Identify resources needed to fully implement the plan.

Strategic Planning for the Diocese of Des Moines
School Visit with School and Parish Leadership

Discussion Topics for School Visits

The bullet items below are a general guide for the meetings with the consultants. Please be ready to respond to the following questions. You may want to prepare by discussing the questions with members of your faculty, administrative team, or board before the consultants arrive. Written responses are helpful, but not required.

Healthy Schools and Catholic Identity

- Share briefly the history of your school.
- Describe the relationship between the school and parish or local parishes.

Demographics

- How have the demographics of your families changed in recent years?
- What changes do you anticipate in the future and how could these changes impact your enrollment?

Enrollment

- Review recent enrollment trends and discuss reasons for them. Are you serving any special populations? If so, what unique needs do they have and how do you reach them?
- What competition exists for your school? What kinds of unique programs does the competition offer, if any? What characteristics and/or programs distinguish your school and make it unique?
- Describe your marketing, recruitment and retention activities. Which have been the most effective? What plans do you have in place to sustain and build your enrollment?

Finances and Facilities

- Review the way the school is funded by looking at various revenue sources: tuition/fees, parish support, fundraising, advancement, other.
- Describe the yearly budgeting process. Describe the tuition setting process.
- What are the key funding issues facing your school (and parish in supporting the school program) that need to be addressed in the planning process?
- Describe your tuition assistance program in terms of sources of funding, identification of need, and marketing.
- Discuss your fundraising and advancement/development program. Does your school have an annual fund or seek major gifts?
- Do parents understand the true cost of a quality Catholic education and the value to them?
- What immediate and longer term facilities needs are there to support your current and anticipated educational and co-curricular programs? How will these be funded?

Academic Programming and Staffing

- In what areas are Catholic schools hindered in providing effective and competitive educational programs? Give specific examples of how Catholic schools should improve.
- Is compensation a barrier for keeping the best teachers? If so, how? Does your school have a salary scale?
- Describe new goals, opportunities or programs that are currently being discussed, planned, or implemented to ensure the future vitality of your school.

Discussion Topics: School Visit with School and Parish Leadership

Governance and Organizational Structure

- Would changes to the structure of Catholic schools in your area produce better outcomes for the future? (specifically: grade structure and number and location of schools)
- How can/should the schools' planning process in the diocese be used to help build a case for support in a capital campaign? Identify areas where a capital campaign could provide essential support for schools throughout the diocese.
- What works well and what is lacking in the current governance structure for your school or school system?
- How could governance be more effective, and in a system how could the central administration and boards be more effective?

Support and Leadership from Diocese of Des Moines

- Describe your relationship with the Catholic Schools Office and the diocese.
- What does the Catholic Schools Office do well?
- What services and leadership do schools need and not need from the diocese?

These questions are only a guide for our discussion. The conversation will focus on those topics of greatest importance for each individual school.

Dear Principal,

In preparation for your school visit with Meitler, please complete the following questions prior to the visit. You are encouraged to meet with staff members or others in your administration to consider the responses. **The form may be completed electronically by clicking and typing into the shaded boxes and emailed to dleon@meitler.com no later than two days before your meeting**, or provide a printed copy at your meeting time. Thank you in advance for your thoughtful preparation.

School: [Click here to enter text.](#)

Principal: [Click here to enter text.](#)

Strategic Planning for the Diocese of Des Moines

School Questionnaire for Principal

Healthy Catholic Schools

List the two most important outcomes a Catholic school should produce in its students. *(You may add more if you wish.)*

[Click here to enter text.](#)

How can Catholic schools enhance their Catholic identity and faith formation with their students?

[Click here to enter text.](#)

Enrollment Management

Who is the current and/or potential competition for your school?

[Click here to enter text.](#)

What characteristics and/or programs distinguish your school and make it unique from your competition? From other Catholic schools in the same service area as you?

[Click here to enter text.](#)

Finances

What do you perceive are the two most challenging issues your school faces financially?

[Click here to enter text.](#)

Academic Programming and Staffing

How would you like to enhance and strengthen your academic programs if you had the resources?

[Click here to enter text.](#)

Possibilities for the Future

How do you envision your school ten years from now?

[Click here to enter text.](#)

Catholic Schools Office

Describe the strengths and weaknesses of the services, support, and leadership from the Catholic Schools Office at the Diocese. What one thing does your school need most that you could not fully accomplish on your own?

[Click here to enter text.](#)



