



EST. 2017

STRATEGIC PLAN

2019

INTRODUCTION

Strategic planning is the process of making decisions about which approaches you'll pursue, and to what end, given a limited set of resources. This process is paramount to any organization's ability to increasingly deliver impact in a way that feels sustainable.

Strategic planning is a highly collaborative process to create a tool that helps you focus on *key priorities* and enables you to make decisions over the next few (1-3) years, while also adapting to new conditions and opportunities as they arise.

Ideally the strategic planning process should answer five questions:

1. For what impact, and for whom, do we want to hold ourselves accountable? Are there specific populations on which we want to focus, or disparities that we want to address?
2. How will we achieve that impact, based on what we as an organization are best positioned to do?
3. What specific priorities and work will we focus on?
4. What resources – financial, human, and organizational – will we need to pursue this work?
5. How will we know we are making progress?

EXECUTIVE SUMMARY

The Strategic Plan process began in December 2018 with meetings between the facilitator, the Chair of the school Board, and the school Principal. A committee of volunteers was formed in January 2019 representing both St. Michael the Archangel and St. Clement Mary Hofbauer communities, and St. Michael-St. Clement Catholic School.

Surveys were distributed in February/March 2019. These included a middle-school student survey, a current school parent survey, and a parishioner survey. The results of these surveys were shared with all committees prior to their work in the hope that the results would enhance their work and are included throughout the content of this report.

As with any strategic plan, it is the responsibility of the School Board to oversee its implementation.

Strategic Planning Committee

Board Chair
Kathleen Klein

Principal
Paul Kristoff

Catholic Identity

Kathleen Klein, *Chair*
Sharon Cerny
Linda House
Friar Timothy

Development

Kaitlin Brown, *Chair*
Debbie Cvach
Theresa Robinson
Theresa Taulbee

Facilities

Bob Eder, *Chair*
Jacki Amato
Linda Kempske
Nick LePore

Finance

John Stabile, *Chair*
Rich Olkowski
Craig Thayer

MISSION STATEMENT

St. Michael – St. Clement School provides an education rooted in the richness of the Catholic tradition and teaching. Each student develops his/her own unique talents and intellectual skills guided by the Gospel and a dedicated faculty and staff. Challenging academics, enduring faith, innovative technology, creative arts, and charitable service enhance each child's development. The school community embraces the diversity of each individual to create a positive environment that appreciates the social, ethnic, and cultural backgrounds of all people. Parish, school, parents, and community collaborate to be strong witnesses of Jesus Christ and participants in the Catholic faith. Students are guided to become service oriented, contributing, and responsible members of a global society.

CATHOLIC IDENTITY

Catholic Identity teaches the sanctity of each human being. Catholic schools strive to help students become fully human – mind, heart, imagination, and soul – in an environment where students feel safe to discover their unique identity and gifts and where all human life and differences are valued.

-Catholic Identity Today, Timothy J. Cook, Ph.D.

Instruction in Catholic faith has always been and will continue to be a distinctive element of our school. All students, regardless of faith, will continue to learn about the Catholic faith using the Archdiocesan curriculum as well as attend mass and participate in retreats. Catholic teachings and traditions will continue to serve as the foundation for all academic and social activities at St. Michael-St. Clement School. Faculty and staff will model and work to build a strong Catholic faith in our students through prayer and activities.

Objective 1: Expand the current retreat from solely 8th grade to include grades 2-7.

Responsible: Principal, Friar Timothy, Kim Thayer, DREs from the Pastorate

Strategies:

1. Committee to design a retreat program for each grade, adding new grade-level retreats over the next three years: adding grades 6 & 7 in 2019-20 and grades 2-5 in 2020-21.
2. Research, consider locations outside of school, i.e. use other available facilities in the Pastorate – Annunciation, St. Clement Mary Hofbauer.

3. Consider all retreat needs including transportation, snacks, materials. Request financial support from Home School Association.
4. Principal to create vehicle for communicating new program to parents, remembering to communicate well in advance of dates.

Objective 2: Diversity student experience at Archdiocesan-required weekly school mass

Responsible: Principal, Friar Timothy, religion faculty and staff, students

Strategies:

1. All 1-8 students participate in weekly masses
2. Kindergarten will participate in a monthly mass and on all Holy Days of Obligation.
3. Pre-K 3 & 4 will participate monthly in a prayer service.
4. Consider adding a monthly theme for each month based on the liturgical season and/or Saints.
5. Give each grade a month at the beginning of each school year; have students plan liturgies, readings, music, etc.
6. Create opportunities for involvement by seminarians and parent volunteers. Consider having grade-level parent representatives who can serve as the liaison between administration and volunteers needed.

Objective 3: Initiate a Speaker Series where students will be exposed to Catholic leaders and professionals in order to educate, inform, and involve them in the current issues of the Catholic church.

Responsible: Principal and Pastorate representative

Strategies:

1. Contact Archdiocesan Division of Catholic Schools and local Catholic high schools for speaker suggestions.
2. Poll faculty, staff, and parents for speaker suggestions.
3. Build partnerships with parishioners, mentors and alumni to assist faculty in Catholic faith formation of students through class participation and witness stories.
4. Create a timeline for implementation: consider school calendar and liturgical season
 - a. Initiate first speaker event in spring 2020
 - b. 2020-21 initiate two/year; one per semester
 - c. Consider having speakers appropriate to grade(s) level(s)
5. Include funding in the school budget for stipends, materials, etc. Consider offering possible sponsorship opportunities to Knights of Columbus or other local businesses to underwrite the costs.

DEVELOPMENT

Goal: to educate parents, alumni/ae, students, staff, and parishioners of both St. Michael the Archangel and St. Clement Mary Hofbauer that the 2017 merger has succeeded in making our school community stronger and sustainable and therefore worthy of their financial support through a strong Annual Fund and Development program.

Objective 1 – To communicate fundraising initiatives throughout the school year to ensure parents understand overarching fundraising goals and the need for a strong annual fund program

Responsible: Advancement Director in collaboration with Principal and Board Development Committee

Strategies:

1. Back to School letter from the Principal outlining planned fundraising for the year. This will include a fundraising calendar so that parents can prepare accordingly. Message should explain and justify funding priorities: should be meaningful, tangible and easy to articulate
2. Monthly email updates via a new e-newsletter from the Advancement Director. This can also be a vehicle to recruit new volunteers.
3. Share results after each major fundraiser so that parents, students, staff and parishioners know where and how proceeds are being used.

Annual Tactics:

1. Schedule summer meetings with parent and student groups to finalize a fundraising calendar
2. By August 15 of each year, identify, recruit, and educate fundraising chairs for all events. Present written job descriptions.
3. Check to ensure school and church events are not being duplicated and events/programs do not overlap
4. Distinguish between fundraisers for individual school groups, parishes, and the annual fund – identify what stays, what goes, and what grows. Design clear and consistent communications that explain the reasons for each and the beneficiary of each.

Objective 2: The Advancement Director and Administrative Assistant only will have access to updating the list in the current excel database. Create a procedures manual so that all input is consistent and new employees and/or volunteers can be easily trained.

Tactics to Grow Annual Fund Mailing List

1. Identify and remove inactive or lost constituents to clean database and ensure data integrity. Research cost of using outside resource to “clean” entire database. This is the most efficient way to keep the database current. The cost can be justified by analyzing and comparing the current cost of all non-deliverable and returned mail.
2. Ensure collection and input of grandparent names, addresses and other contact information by collecting forms from annual Grandparents Day.
3. Update and expand the alumni database by at least 100 names annually with addresses, emails, and phone numbers by contacting the graduates of St. Michael and St. Clement Schools via direct mail, email, and phone call. Alumni or other volunteers should be recruited and trained to complete this task so as not to unduly burden the Advancement Director.
4. Church bulletins and social media should be used on a consistent basis to promote the alumni page on the STMSTC website. The alumni page should offer an “Update Your Information” section that, when completed, gets sent directly to Advancement Director. Efforts should be made to collect alumni information from class reunions. This information can be collected from event registration. Laptops can also be available during reunion events for alumni to update information onsite.

Objective 3: To grow the Annual Fund by 5% each year over the next 3 years and to grow the Annual Fund mailing list by 7 %.

Background: Annual Giving is the foundation of Development best practices. Unrestricted giving supports the operating budget for the school and can ultimately aid in keeping tuition stable. By making a case that connects mission, needs, and benefits, STMSTC will be able to connect the prospects/donors’ interests in a clear and compelling way that touches the heart and opens the mind, resulting in increased giving to an unrestricted annual giving program.

Responsible: Advancement Director with support from the Board Development Committee

Tactics to Grow Annual Fund:

1. With the Development Committee, create a compelling Case for Support (sample attached in appendix). In its simplest form your case for support is a one-page document that tells your constituents/donors what you hope to

accomplish with their philanthropic gifts. Your Case articulates purposes, accomplishments, and goals for the future. This should be included in all annual fund materials and on the development page of the website.

2. After confirming with the School Board and Parish calendar, schedule at least one Leadership Giving Event, identifying and inviting the highest and most-consistent donors; invite donor(s) to tell their stories on why they support STMSTC.
3. Produce three annual mailed segmented solicitations w/ ASK amount
 - a. Existing donors: ask amount should show an increase over last gift
 - b. New donors: ask amount should be an “average gift” suggested amount
4. Update online giving page on school website; include link in all written materials
5. Use a mail house to ensure most up to date and accurate mailing lists, and to decrease valuable staff time and labor for all mailings.
6. Engage key champions (School Board, Parent Association, volunteers, etc.) with specific roles and responsibilities which include introductions, cultivations, and solicitations. Board Chair sets expectation of and solicits 100% Board annual fund participation before general solicitation opens.
7. Work closely with the Finance Committee of the Board to ensure Advancement has the financial resources necessary to achieve goals. (Needs include printing, postage, mail house, etc.)

ENROLLMENT AND MARKETING

Enrollment management includes marketing for the recruitment and retention of students that yields results and focuses on family as the customer fill every classroom seat. Use personal, purposeful communications and targeted events to validate current families’ decisions to re-register while engaging and welcoming new families.

Objective 1: Beginning with the 2019-2020 school year, increase total enrollment by 5% per year for the next 3 years. This includes increasing both retention of existing students and recruitment of new students.

Strategies:

1. Retain 90% of all students by offering incentives to current parents. Work closely with Finance Committee of the Board to waive fees for early re-registration by a specified date.
2. Work with Finance Committee to offer free registration to families registering a new sibling when re-registering older sibling(s) by a specified date.

Tactics to Retain Existing Families

1. Publish and promote early registration date(s) that include early registration incentives, on website and in weekly parent email
2. Host step-up days for students to move up one grade and experience activities they can expect next year.
3. Create a card/flier for each grade that outlines curriculum, field trips, and other events/programs specific to that grade.
4. Call, call, call – keep in touch through consistent contact; control the process
5. Send personal letters, with deadlines, to those who did not re-reregister
6. Make the process easy and convenient: provide a registration table at all school events. Consider a Re-Registration Day after Sunday masses; offer incentives and refreshments.
7. Use the school notification system to phone, text or email current families, reminding them of the re-registration deadline
8. Consider tiered registration that increases exponentially after deadline has passed.
9. Use signage around campus promoting incentives
10. Offer incentives for classes achieving 95% re-registration rate (pizza or ice cream parties, dress down days or other creative incentives)
11. Display first names of re-registered students in visible areas – as bulletin Board postings or hanging decorative ornaments in the shape of stars, angels, sheep or other characters tied to the school's annual theme

Tactics to Recruit New Families

1. Create a new recruitment team with parents and alumni from all related parishes
2. Send personal letters for the registration kick-off, process and deadlines to all who have indicated interest
3. Send personal invitations to events and tours (Christmas Concert, STEM Day, etc.)
4. Attend community and parish events; provide school information table; use student and parent volunteers who are well trained.

5. Use the school website and social media effectively, creating a sense of urgency through routine updates (“We’re 75% full for next year”; “Only five spots remaining in Kindergarten!”)
6. Include a call to action on key pages, linking to Open House PDF, registration form and “tour today” information
7. Share enrollment data monthly or more often as spring approaches, with recruitment team, Board, faculty, and parents. Remember, parents are your best marketing tool!
8. Use the parish bulletins weekly to message urgency and limited space availability
9. Go “where the moms are” i.e. research sports, gymnastics, and dance schools/programs for possible advertisement opportunities.

Objective 2: To expand STMSTC’s reach into the local Latino and Hispanic communities within the Pastorate and surrounding areas with the goal of increasing Latino and Hispanic enrollment.

Strategies:

1. Add new Board member(s) from each Parish and demographic. Ask these new members to serve on the Enrollment/Marketing Committee.
2. Recruit Hispanic and Latino members for the Enrollment/Marketing committee from current parents.
3. Review all current enrollment marketing materials, including admissions, and create Spanish versions of all. Consider doing same for school website.
4. Schedule monthly marketing tables at/after Hispanic masses, making sure to have a bilingual volunteer available.

Objective 3: To report to the Board at the first meeting of the year to share the detailed annual marketing plan and provide updates at all bimonthly Board meetings. The plan should include and explain the involvement of all Board members and Enrollment Committee members.

Responsible: Advancement Director

Objective 4: To research new marketing opportunities that have not yet been implemented/ tested in the school community. These efforts should include finding vehicles that will saturate the local market by geotargeting to keep the broader community and Pastorate constantly aware of not only our physical presence but of our success stories. Research what other successful schools are doing and emulate.

Responsible: Advancement Director and Enrollment/Marketing Committee

FACILITIES

The Facilities committee studied current facilities and created a plan that identified needs and improvements that will enhance and ensure a safe and environmentally friendly learning environment for both students and faculty. The Facilities Committee did not include costs or possible funding resources; therefore, additional information has been included here to assist in establishing the means of funding these improvements and renovations.

Objective 1: Bathrooms

1. All bathrooms will be evaluated during the 19-20 school year to determine best option: remodel or completely redo
2. Contract an architectural firm to design to ensure that all bathrooms are ADA compliant
3. A request for proposal will be distributed by the Facilities Committee and will include deadlines and timelines.
4. Once costs are determined, consider remodeling one floor at a time with installation complete within five years.

Objective 4: Create a facilities master plan to guide facility development to address the environmental condition and esthetic appearance of the school.

1. Create an ongoing, consistent schedule that provides general maintenance in all classrooms to includes painting, general cleaning and light maintenance.
2. Identify specific jobs that require professionals and those that could be outsourced to parent/student volunteers, youth groups and organizations looking for community service opportunities.
3. Consider creating a parent volunteer facilities committee that will undertake these general needs

Objective 5: Establish a working development committee that can research individuals, corporations, and foundations that support these types of facility upgrades.

1. Develop strategies to approach benefactors to endow the school
2. Recruit, train, and provide support to the Advancement Director for grant writing
3. Develop strategies to create donor recognition and naming opportunities throughout the school

FINANCE

A school's finance committee is a standing committee of the School Board tasked with advising the Principal on all financial matters related to the school's budget, spending, long term financial planning, tuition and fees, and overall fiscal status.

Objective 1: To be open and transparent with the Pastorate parishes and the school community regarding all school finances, fundraisers, and tuition information.

Strategies:

1. Beginning with the 2019-20 school year, the finance committee, with support of the full board, and after approval from the Archdiocese of Baltimore, will regularly publish the annual school budget on the school website. Consider publishing an annual financial report in all parish bulletins. Work closely with the Development Committee on timelines for publishing.
2. After each school fundraiser, the finance committee, with support from the Principal and Advancement Director, will publish the income/expense reports (including net profit) on the school website and in the parent e newsletter. These fundraisers should include Christmas Bazaar, Race for Education, and other school-wide fundraisers.
3. Quarterly Annual Fund updates will be published on the school website and also in parent e newsletter. Consider including grade participation breakdown and constituency breakdown (parents, alumni/ae, grandparents, etc.)

Objective 2: Maintain a balanced budget that will support all school curricular programs while offering competitive tuition rates with other local Catholic schools.

Strategies:

1. Working closely with the Advancement Director and Enrollment/Marketing Committee, support the goals of a 5% enrollment increase and a 90% retention rate over the next three years with possible additional funds for marketing.
2. Research mandated family service hour programs at other schools to gauge effectiveness at St. Michael-St. Clement School. If implemented, be sure the plan is thoroughly vetted, detailed, and communicated. Assign a dedicated staff person to oversee management. Be sure to address possible consequences for those who do not comply.

3. Maintain multi-child family discount program. Work with Advancement Director to promote across all publications and media channels.
4. Maintain strong tuition assistance program. Annually review for increase to budget. Consider assigning one fundraiser/year to raise funds for program.
5. Maintain discount for Catholic families – annually review to gauge true impact. If we find we are losing families or not attracting new families, consider doing away with discount.

Objective 3: To secure the health and financial stability of STMSTC, through new sources of funding, scholarships, stewardship programs and by increasing the enrollment and retention at the school.

Strategies:

1. Develop a long-term financial model (3-5 years) aimed at reducing dependence on tuition. Finance Committee to research other successful school programs in and outside the Archdiocese of Baltimore.
2. Ensure that 100% tuition is paid by a published date to eliminate delinquency. Implement policy that will deny reregistration until tuition is paid in full. Consider creating a subcommittee or assigning a member of the Finance Committee to work closely with the Principal to address individual family needs. Meet and review tuition arrears quarterly to avoid issues at year-end.
3. Create a rainy-day fund as a safety net for inevitable emergencies. The Finance Committee should decide an annual amount to be applied to this fund at the same time the budget is being created.
4. With the Development Committee, foster a continual culture of philanthropy by:
 - a. promoting event support and sponsorships, the annual fund, and parent/alumni/grandparent charitable giving through an increased budget for development
 - b. assisting the Advancement Director and Development Committee with grant research by providing financial requirements in a timely manner
 - c. participating in parish and alumni cultivation events as representatives and supporters of STMSTC.

CONCLUSION

As board members, administrators, faculty, and staff, we have a responsibility to both past and future generations to make St. Michael-St. Clement Catholic School a place for people to learn, celebrate and live their faith.

This Strategic Plan provides a framework for fulfilling this responsibility and offers a snapshot of our current status, a vision for where we want to go, and strategies for accomplishing that vision.

Thank you to everyone who contributed to this important work.