

*An Open and Transparent Process
to Revitalize and Strengthen the Catholic Schools
in the Diocese of Charleston*

WE BELIEVE:
A Strategic Growth Plan for the Catholic Schools
in the Diocese of Charleston

Assembled by:

The Catholic Schools Task Force

In Partnership With:

The National Catholic Educational Association
The Institute of School & Parish Development

January 22, 2016



National Catholic Educational Association
Leadership. Direction. Service.

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

CONTENTS

I.	Executive Summary	3
II.	Introduction and Overview	5
III.	Task Force Vision Statement	11
IV.	Strategic Growth Plan	12
	Mission and Catholic Identity	12
	Operational Vitality	17
	Strategic Framework	
	Enrollment and Marketing	
	Operational Model	
	Financial Model	
	Controls and Measures	
	Academic Excellence	33
	Governance and Leadership	37
V.	Implementing, Monitoring, and Evaluating the Plan	40
	Appendices	
	A. Assessment Methods and Information Sources	44
	B. Planning Process Timeline	46
	C. Canon Law and the Catholic School	47
	D. Market Analysis of Survey Data	48

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

I. EXECUTIVE SUMMARY

In 2014, Bishop Robert E. Guglielmone called for a Catholic Schools Task Force to establish a vision and plan to revitalize and strengthen the Catholic schools of the Diocese of Charleston. The National Catholic Educational Association and the Institute of Parish & School Development were invited to facilitate a process to examine the 28 parish-sponsored elementary schools and three diocesan secondary schools from a diocesan-wide perspective. Bishop Guglielmone encouraged the Task Force “to think outside the box... we need creative, new, and tested ways to make sure our schools are not only viable, but also are thriving into the future.”

The planning process brought people and process together in an open and transparent way to plan for stronger Catholic schools in the diocese, develop a comprehensive strategic plan to ensure a vibrant future for the schools, and establish standards to strengthen and sustain the schools diocesan-wide. Four planning areas were established at the outset: (1) Mission and Catholic Identity, (2) Operational Vitality, (3) Academic Excellence, and (4) Governance and Leadership.

A formal assessment of the Catholic schools was conducted to inform the work of Task Force. Input was received from hundreds of people from around the diocese, including principals, pastors, teachers, parents, diocesan officials, and other key stakeholders in the Catholic community. Guided by the Task Force Vision Statement, the Steering Committee met monthly for a year, chaired Core Teams that developed recommendations in each planning area, and hosted a diocesan congress. Through the planning process, more than 1,000 people all told contributed not only their observations, concerns, and suggestions, but also their love, passion, and commitment to Catholic education.

The Task Force presents *A Strategic Growth Plan for the Catholic Schools in the Diocese of Charleston* to serve as a guide to assist and support the schools as they move toward a position of strength and vitality. It is a living document to be implemented over the next five years. One hope of this process is that each school will develop its own complementary strategic growth plan in concert with the work of the Task Force.

The **Mission and Catholic Identity** plan aims to further strengthen the Catholic schools of the Diocese of Charleston in their mission to bring children to Christ and His Church, encourage students to develop a mature commitment to lifelong discipleship, and inspire all Catholics in the diocese to embrace this mission. The plan offers ways to support parents as effective evangelizers and catechists of their children and make certain that all clergy and lay faithful of the diocese recognize and support the schools as an integral part of the mission of the church. Key to these efforts will be to foster meaningful collaboration among the schools and all of the parishes in the diocese.

Faith-filled, vibrant, and growing Catholic schools require a commitment to effective and efficient operations. This operational plan is the foundation for achieving academic excellence and fulfilling our Catholic mission. The **Operational Vitality** plan offers a strategic framework to organize and plan our efforts, actionable enrollment and retention strategies (branding and marketing), an efficient operational model, an impactful financial model, and a new controls and measures scorecard process to track and monitor progress at the diocesan and school levels. A critical goal is to enable schools and the diocese to assess these areas objectively and holistically in order to recommend strategies and tactics that are based not only on our love of the Catholic Church, but are also relevant, differentiated, and actionable.

The **Academic Excellence** plan will assist the Catholic schools to ensure a curriculum and instructional practices that are challenging, rigorous, and rooted in the Catholic faith; inclusive of a diverse range of abilities so all students can reach their potential; and emphasizes teaching students to “learn how to learn” and preparing them for the challenges and opportunities of the 21st century. To ensure the academic excellence of the Catholic schools, this plan offers varied ways to attract and retain highly qualified and mission-oriented teachers and administrators, continuously update and integrate technology in the classroom, establish procedures to assist

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

underperforming schools, effectively and efficiently monitor and evaluate student progress, and address the physical, social, and emotional needs of students.

The **Governance and Leadership** plan will enable the Diocese of Charleston to hire, develop, and retain dynamic, enthusiastic, and qualified leadership in pastoral and administrator roles; create administrative oversight and accountability to produce consistent results diocesan-wide; and strengthen diocesan leadership and the Catholic Schools Office to provide appropriate, necessary, and supportive services to help all schools thrive. Critical to ensuring excellent leadership will be a commitment to appointing pastors who demonstrate effective pastoral support and leadership of Catholic school education; building highly effective local school advisory boards; providing school leaders with the necessary support, guidance, and direction; identifying and cultivating future school leaders; and continually developing creative, collegial learning communities among the Catholic Schools Office, principals, and teachers.

The implementation, monitoring, and evaluation of the Strategic Growth Plan will offer opportunities to disseminate the goals and strategies to the appropriate groups throughout the diocese. Implementation begins with widely communicating the plan to the Catholic community and general public. A Strategic Plan Implementation Task Force will be formed for one year with the charge of establishing a timeline and plan to implement the strategies in the four planning areas and forming a new Diocesan Schools Advisory Board. From there, the Diocesan Schools Advisory Board and a strengthened Catholic Schools Office will oversee ongoing implementation to ensure a successful path toward strengthening and revitalizing Catholic school education in the diocese.

The Catholic Schools Task Force believes that a future in which Catholic school education is a thriving ministry serving the Diocese of Charleston requires that the entire Catholic community of South Carolina embrace these schools in the spirit of communion, collaboration, and common mission. Thus, from the chancery to the pulpit, to the pew, to the classroom, and to the home, there must be a renewed sense of mission, vision, and stewardship of Catholic education as a vital ministry of the diocese and as essential to ensuring a vibrant future for the Catholic Church in South Carolina. WE BELIEVE that such a transformation is needed to produce a wider appreciation of the value of a Catholic education; increased advocacy for the growth of our schools from families, teachers, school leaders, and pastors; and a strengthened will on the part of the entire Catholic community to invest in Catholic school education.

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

II. INTRODUCTION AND OVERVIEW

The roots of Catholic education in the Diocese of Charleston go back to its founding in 1820. Catholic schools in the early 19th century were few in number and mainly administered by religious sisters (the Order of St. Ursula and the Sisters of Charity of Our Lady of Mercy, a diocesan community). Some schools operated under the umbrella of orphanages. Others were one-room schools in which religious education for the children in small parishes was expanded to include other academic studies. In the 1880s, following the vision of the Third Plenary Council of Baltimore, Bishop Henry P. Northrup, the fourth bishop of Charleston, established the beginning of the diocesan parochial school system, calling for schools to be founded at parishes across the diocese. Many of the original parish schools have closed or merged with other local schools. The most rapid growth of Catholic schools in the Diocese of Charleston was between 1950 and 1960, when 20 schools opened.

A century later, Bishop David B. Thompson, 11th bishop of Charleston, convened in 1992 a diocesan-wide synod that included the clergy, religious, and laity from throughout the diocese. The synod articulated a mandate that all Catholic schools meet four criteria: ***authentically Catholic, academically excellent, financially feasible, and community supported.*** Under Bishop Robert J. Baker, 12th bishop of Charleston, the Catholic population grew to about 4% of the state's population through both population shifts and his strong promotion of evangelization. Bishop Robert E. Guglielmone, 13th bishop of Charleston, responded to the need for Catholic education in several areas including undertaking studies to establish the feasibility of Catholic high schools in the Myrtle Beach and Hilton Head areas.

Over the past several decades, the Catholic schools of the Diocese of Charleston have experienced serious challenges that are not unique to the diocese. Across the country, the cost of a Catholic education has continued to rise because of the need to provide just salaries and benefits, maintain aging facilities, provide up-to-date curriculum materials, stay current with technology, and so forth. At the same time, revenue has dropped because of enrollment declines. The crisis is not just financial, however. The Catholic Church has also witnessed a cultural shift away from appreciating and supporting a Catholic school education as integral to raising children in the faith and as a vital ministry of the church. These problems are compounded in areas where families are unable to pay tuition and parishes lack adequate resources to support a school.

Despite these challenges, the Diocese of Charleston is experiencing significant growth in its Catholic population. The growth is substantial in areas like Hilton Head, Greenville, Charleston, Myrtle Beach, Rock Hill, and Columbia. Reflecting this growth, the Diocese recently opened two new schools in Longs (Holy Trinity Catholic School) in 2009 and Ridgeland (John Paul II Catholic School) in 2013 and will soon open St. Elizabeth Ann Seton High School in Myrtle Beach in 2017. Similarly, the Diocese opened three new parishes in 2014 alone: St. Clare of Assisi on Daniel Island, St. Thomas Moore in Columbia, and Our Lady of Hope in Manning.

In response to these challenges and apparent growth, Bishop Guglielmone called in 2014 for a Catholic Schools Task Force to establish a vision and plan to revitalize and strengthen the Catholic schools of the Diocese of Charleston. The National Catholic Educational Association and the Institute of Parish & School Development were invited to facilitate a process to examine the 28 parish-sponsored elementary schools and three diocesan secondary schools from a diocesan-wide perspective. Bishop Guglielmone explicitly encouraged the Catholic Schools Task Force "to think outside the box... we need creative, new, and tested ways to make sure our schools are not only viable, but also are thriving into the future."

The Catholic schools strategic planning process was developed with Bishop Guglielmone's charge in mind. It is also aligned with the vision of the United States Conference of Catholic Bishops' (USCCB) 2005 statement, *Renewing Our Commitment to Catholic Elementary and Secondary Schools in the Third Millennium:*

Our vision is clear: our Catholic schools are a vital part of the teaching mission of the Church. The challenges ahead are many, but our spirit and will to succeed are strong.... We must respond to

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

challenging times with faith, vision, and the will to succeed because the Catholic school's mission is vital to the future of our young people, our nation, and most especially our Church.¹

BOX 1. CATHOLIC SCHOOLS IN THE DIOCESE (BY REGION AND YEAR FOUNDED)

UPSTATE

1. St. Mary's Catholic School (1900)
2. St. Paul the Apostle Catholic School (1941)
3. St. Anthony of Padua Catholic School (1951)
4. Our Lady of the Rosary Catholic School (1955)
5. St. Joseph Catholic School, Anderson (1967)
6. St. Joseph Catholic School, Greenville* (1993)
7. Prince of Peace Catholic School (2004)

MIDLANDS

1. St. Peter's Catholic School, Columbia (1878)
2. St. Martin de Porres Catholic School (1936)
3. St. Anne Catholic School, Rock Hill (1951)
4. St. Anne Catholic School, Sumter (1954)
5. St. Joseph Catholic School, Columbia (1954)
6. St. Mary Help of Christians School (1955)
7. Our Lady of Peace Catholic School (1956)
8. Cardinal Newman School (1960)
9. St. John Neumann Catholic School (1986)
10. St. Francis Xavier High School* (2000)

PEE DEE

1. St. Andrews Catholic School (1956)
2. St. Anthony Catholic School, Florence (1956)
3. St. Michael Catholic School (1999)
4. Holy Trinity Catholic School (2009)

COASTAL

1. Bishop England High School (1915)
2. Blessed Sacrament Catholic School (1949)
3. St. John Catholic School, North Charleston (1949)
4. Christ Our King/Stella Maris Catholic School (1950)
5. Divine Redeemer Catholic School (1960)
6. Nativity School (1960)
7. Summerville Catholic School (1984)
8. The Charleston Catholic School (1991)

LOWCOUNTRY

1. St. Peter's Catholic School, Beaufort (1991)
2. St. Francis Catholic School (1996)
3. St. Gregory the Great Catholic School (2006)
4. John Paul II Catholic School (2013)

* Two private independent Catholic schools were not part of the diocesan strategic planning process.

BOX 2. SNAPSHOT OF THE CATHOLIC SCHOOLS IN THE DIOCESE OF CHARLESTON IN 2014

- *Number of schools:* The 33 Catholic schools in the Diocese of Charleston use four types of governance models: 25 parish elementary schools, three inter-parish elementary schools, three diocesan secondary schools, and two private independent Catholic schools. All but the two private independent schools participated in the planning process.
- *Parishes:* Of the 95 parishes in the Diocese of Charleston, 25 have sole responsibility for a school and eight are affiliated with a regional school.
- *Enrollment:* The Catholic schools in the diocese have experienced a 10% decline in enrollment in the past 10 years, compared to a 20% enrollment decline in Catholic schools nationwide. This loss is entirely at the elementary school level; secondary enrollment has remained stable. This follows a similar trend nationally.
- *Demographics:* 79% of students and 77% of teachers are Catholic.
- *Tuition:* Average elementary school tuition is \$4,644 (parishioner rate) and \$6,282 (non-Catholic rate); average secondary tuition is \$7,958 (Catholic rate) and \$10,132 (non-Catholic rate).
- *Cost per pupil:* Average cost per pupil is \$6,466 at the elementary level and \$10,206 at the secondary level.
- *Salaries:* Average teacher salaries of \$32,860 (elementary) and \$39,100 (secondary) are 11% and 13% below the national average for their respective Catholic school counterparts. Benefits are offered by all schools though there is a wide discrepancy in how much each school contributes to offset the costs of health insurance.

¹ United States Catholic Conference of Bishops. (2005). *Renewing our commitment to Catholic elementary and secondary education in the third millennium*. Washington, DC: USCCB. Retrieved from <http://www.usccb.org/beliefs-and-teachings/how-we-teach/catholic-education/upload/renewing-our-commitment-2005.pdf>

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

- *Advisory boards:* 100% of the schools have an established advisory board.

SOURCES:

Diocese of Charleston Catholic Schools Office.

The National Catholic Educational Association *Annual Statistical Report on School, Enrollment, and Staffing: 2014-2015*.

THE PLANNING PROCESS

The Diocese of Charleston Catholic schools planning process was guided by three goals:

1. Bring people and process together in an open and transparent way to plan for stronger Catholic schools in the diocese.
2. Develop a comprehensive strategic plan to ensure a vibrant future for schools.
3. Establish standards to strengthen and sustain Catholic schools diocesan-wide.

Four planning areas were established based on the *National Standards and Benchmarks for Effective Catholic Elementary and Secondary Schools*:²

1. Mission and Catholic Identity
2. Operational Vitality
3. Academic Excellence
4. Governance and Leadership

The process was designed to ensure strong and transparent communication, as well as to build strong ownership of the process by key stakeholders in Catholic education, including principals, pastors, and diocesan officials. In September 2014, a Steering Committee was assembled with members who have a clear and faithful commitment to Catholic education as well as expertise in at least one of the planning areas. Steering Committee members each chaired one of the planning area Core Teams. The Steering Committee and the Core Teams represent the Catholic Schools Task Force.

A formal assessment of the Catholic schools was conducted throughout fall 2014 to inform the work of the Task Force. Input was received from hundreds of people from around the diocese, including principals, pastors, teachers, parents, diocesan officials, and other key stakeholders in the Catholic community (see Appendix A for assessment methods and information sources).

The assessment identified 10 key findings that the Task Force considered in its planning:

- Catholic identity is consistently strong throughout the diocese and viewed as the fundamental distinct strength of the schools, but there is a need to ensure the continual formation of all faculty and school leaders.
- Schools are challenged by a precipitous decline in enrollment since 2006, despite continued growth in the Catholic population in South Carolina.
- The Catholic Schools Office does not have sufficient staffing and structures to provide the necessary support and oversight that many Catholic school leaders need and desire.
- Catholic school leaders identify a significant need to enhance leadership cultivation, ongoing formation, and succession planning.
- There is inequity in the academic excellence of the schools. Some are considered strong and competitive, while others are regarded as average and losing their competitive edge.
- The key strengths and value of a Catholic education in the diocese are not sufficiently articulated and marketed to the Catholic community and public at large.

² To access full text of the National Standards and Benchmarks, visit: <http://www.catholicschoolstandards.org/>

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

- Most schools do not have an advancement/development professional on staff to ensure best practices in planning, stewardship, fundraising, alumni engagement, marketing, and enrollment management.
- There is lower than expected support and promotion of Catholic schools by the general Catholic community in the Diocese of Charleston.
- There is widely shared sentiment for the need to increase diocesan support, collaboration across schools, and investment from all parishes—but in a way that does not undermine subsidiarity.
- Many Catholic school parents and parishioners express a desire for greater integration of Catholic school education with other parish ministries, as well as with parishes that do not sponsor Catholic schools.

Each Steering Committee member co-chaired a planning area Core Team of 10 to 15 people, which met multiple times from January through March 2015 (see Appendix B for the complete timeline of the planning process). These Core Teams engaged in the following:

- Analyzed the assessment data
- Conducted a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis for their areas
- Constructed a Task Force Vision Statement
- Developed a Purpose Statement for their planning area
- Identified and prioritized key challenges that are common across the Catholic schools

Finally, these Core Teams brainstormed solutions to these challenges using the SMART formula (Specific, Measurable, Achievable, Relevant and Timeline-driven).

Building on these planning sessions, Bishop Guglielmone and the Task Force hosted a diocesan-wide congress on June 24, 2015, to present their key challenges. The congress drew more than 100 people representing principals, pastors, board chairs, teachers, parents, business leaders, diocesan officials, and others concerned about the future of Catholic education. The participants worked in planning groups to generate more solutions to the common challenges and to help the Task Force prioritize its recommendations.

Throughout July and August, the Steering Committee examined the many solutions and suggested priorities offered by the Core Teams and congress participants to develop a proposed plan. Next, the proposed plan was formally reviewed by a canon lawyer to ensure it is in line with canon law. Rev. Phillip J. Brown, P.S.S., J.D., J.C.D., canon law professor and Rector/President of the Theological College of The Catholic University of America, reviewed the plan and commented: “The Strategic Growth Plan is great the way it is and fine from the canonical standpoint.”³ In September, the Steering Committee submitted the plan to Bishop Guglielmone for his official approval.

Through the planning process to strengthen and revitalize Catholic school education in the Diocese of Charleston, more than 1,000 people all told contributed not only their observations, concerns, and suggestions, but also their love, passion, and commitment to Catholic school education. These voices echoed the sentiment of the U.S. Conference of Catholic Bishops expressed 10 years ago:

Young people are a valued treasure and the future leaders of our Church. It is the responsibility of the entire Catholic community—bishops, priests, deacons, religious, and laity—to continue to strive toward the goal of making our Catholic elementary and secondary schools available, accessible, and affordable to all Catholic parents and their children, including those who are poor and middle class. All Catholics must join together in efforts to ensure that Catholic schools have administrators and teachers who are prepared to provide an exceptional educational experience for young people—one that is both truly Catholic and of the highest academic quality.⁴

³ See Rev. Phillip Brown’s reflection “Canon Law and the Catholic School” in Appendix C.

⁴ USCCB, 2005.

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

THE STRATEGIC GROWTH PLAN

The Catholic Schools Task Force, in partnership with the National Catholic Educational Association and the Institute of School & Parish Development, presents the Catholic Schools Strategic Growth Plan. The plan is organized in the same areas as the planning process: Mission and Catholic Identity, Operational Vitality, Academic Excellence, and Governance and Leadership. Each section begins with the Core Team Purpose Statement, followed by goals and strategies. This plan serves as a guide to assist and support the schools as they work toward a position of strength and vitality. The plan is a living document to be implemented over the next five years. One hope of those involved in this process is that each school will develop its own complementary strategic growth plan in concert with the work of the Task Force. Realistically, not all schools will need or be able to implement all strategies in five years. Nevertheless, as these strategies are fully implemented, we are confident that schools will show tangible and positive growth in each planning area.

Throughout the Strategic Growth Plan are specific strategies that address a key observation by school leaders that their institutions are isolated and lack the necessary resources to address today's challenges. Building on the wide engagement of people in the planning process, the Task Force offers many ways to increase *collaboration* by strategically sharing resources, expertise, and best practices. Supporting Catholic school education into the future entails realizing the shared *communion* or unity among the schools, every parish, the diocese, and the broader Catholic community as they work together to achieve a *common mission* to strengthen and revitalize this integral ministry. Although they address common challenges, these strategies are meant by design to support the schools in a way that preserves local autonomy, encourages a tailored solution to local needs, and draws on the unique strengths of individual school communities. At the same time, the Task Force believes that to assist the schools, it is critical to strengthen the Diocesan Catholic Schools Office in terms of resources, personnel, and its role with the schools. Thus, the complex needs of the schools require a comprehensive and coordinated approach that offers solutions at the local (individual school and parish) level, at the regional (multiple schools and parishes) level, and across the diocese (all schools and parishes).

A future in which Catholic school education is a thriving ministry serving the Diocese of Charleston requires the entire Catholic community of South Carolina to embrace these schools in the spirit of communion, collaboration, and common mission. Thus, from the chancery to the pulpit, to the pew, to the classroom, and to the home, there must be a renewed sense of mission, vision, and stewardship of Catholic education as a vital ministry of the diocese and as essential to ensuring a vibrant future for the Catholic Church in South Carolina. Such a transformation is needed to produce a wider appreciation for the value of a Catholic education; increased advocacy for the growth of our schools from families, teachers, school leaders, and pastors; and a strengthened will on the part of the entire Catholic community to invest in Catholic school education.

We conclude this introduction with a statement that emerged from the planning process. *We Believe*, the title the Task Force chose for the Strategic Growth Plan, articulates the sincere love and commitment to Catholic school education expressed not only by the Task Force members, but also by the hundreds of people involved in the planning process:

WE BELIEVE.

We believe in your children, their future and their potential.

We believe in our priests, our administrators, our teachers, and our parents as inspiring a child to reach his or her full potential. This takes a commitment by all, not one.

We believe in our schools and their ability to provide a safe and nurturing environment.

We believe in the Catholic Church, whose future is the children.

We believe in God and His belief in each of us.

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

Box 3. CATHOLIC SCHOOLS TASK FORCE

Steering Committee

Michael Acquilano, Director, South Carolina Catholic Conference and St. Thomas Aquinas Scholarship Fund
Dr. Tim Carroll, Associate Dean, Executive Education, Moore School of Business, University of South Carolina
Paul Carver, Former Superintendent, School Advisory Board Member, Holy Trinity School, Longs
Barbara Cole, Principal, St. John Neumann School, Columbia
Lydia Doyle, Director of Research and Planning, Diocese of Charleston
Sharol Giuffre, School Advisory Council Member, Summerville Catholic School, Summerville
Muriel Lanciault, Former Superintendent, Director of Ministries, St. Thomas Apostle Parish, North Charleston
Sandra Leatherwood, Director for Catholic Education, Diocese of Charleston (ex officio)
Dr. Michael Martocchio, Director of Catechesis, Diocese of Charleston
Carrie Mummert, Director of Advancement, Bishop England High School, Daniel Island
Jeffrey M. Rehling, Director, Center for Marketing Solutions, University of South Carolina
Sr. Mary Sheila Maksim, Principal, St. Mary's School, Greenville
Dr. Ginny Riga, Project Montessori Consultant, Committee Member, LARCUM Initiative, Columbia
Fr. Joseph Romanoski, Parish Administrator, Blessed Sacrament Church, Charleston
Beth Tuchfarber, Business Manager, St. John the Beloved Church, Summerville
Peggy Wertz, Principal, St. Mary Help of Christians School, Aiken

Core Team Members

Kristin Allen, Parent, St. Peter's Catholic School, Columbia
Judy Anderson, Supporter, Summerville Catholic School, Summerville
Steve Anderson, Supporter, Summerville Catholic School, Summerville
Carol Aust, School Advisory Board, The Charleston Catholic School, Charleston
John Barker, Chief Financial Officer, Diocese of Charleston, Charleston
Nell Bramhall, Teacher, Cardinal Newman School, Columbia
John Byrnes, President, Christ Our King Stella Maris School, Mt. Pleasant
Mark French, School Advisory Board, The Charleston Catholic School, Charleston
Jacquie Kasprowski, Principal, Cardinal Newman School, Columbia & Associate Director for Secondary Education, Diocese of Charleston
Juliane Laskowski, Teacher, St. Anthony of Padua Catholic School, Greenville
Fr. Gary Linsky, Pastor, St. Peter's Catholic Church, Columbia
Suzy Parrott Madden M.Ed. Director of DeLaSalle Program, Cardinal Newman School, Columbia
Jeff McAtee, Parent and Parishioner, Christ Our King Stella Maris Catholic School and Church, Mt. Pleasant
Joanne McAtee, Parent and Parishioner, Christ Our King Stella Maris Catholic School and Church, Mt. Pleasant
Nakisha McKinney, Teacher, St. Anthony of Padua Catholic School, Greenville
Joann Miller, Director of Religious Education, St. Mary's Catholic Church, Greenville
Claire Mistretta, Retired Human Resources Manager, Mt. Pleasant
Anne Moore, Parent, Prince of Peace Catholic School, Taylors
Melissa Norris, Teacher, Cardinal Newman School, Columbia
Tony Oglietti, Finance Council Member, Summerville Catholic School, Summerville
Ginger Reilly, School Advisory Board, Summerville Catholic School, Summerville
Roseann Tracy, Former Principal, Blessed Sacrament Catholic School, Charleston
Chris Trott, Principal, St. Gregory the Great Catholic School, Bluffton
Marianne Tully, Principal, Our Lady of the Rosary Catholic School, Greenville
Ann Weiser, Lecturer, University of South Carolina, Columbia
Cheree West, Inclusive Education Teacher, Summerville Catholic School, Summerville
Victoria White, Teacher, St. John Neumann Catholic School, Columbia
Antoinette Wright, Teacher, St. Martin de Porres Catholic School, Columbia

Facilitators

Dr. Erik Goldschmidt, Associate Vice President, Institute of School & Parish Development
Dr. Regina Haney, Director of Boards and Councils Department, National Catholic Educational Association

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

III. **TASK FORCE VISION STATEMENT**

The Task Force developed a vision statement which guided the planning process. The Strategic Growth Plan outlines the goals and strategies to realize this vision. The vision will continue to serve by inspiring the implementation of this plan.

Catholic schools in the Diocese of Charleston will provide meaningful, engaging learning experiences and faith formation. Our school communities will be steeped in Catholic culture, rooted in Gospel values, and centered on the Eucharist. We will welcome families of diverse backgrounds who seek Catholic education for their children. We will value all students, acknowledge their unique gifts, and empower them to mature academically, spiritually, socially, emotionally, and physically.

The Catholic community of South Carolina will identify, cultivate, and support visionary school leaders and effective teachers who embody the Catholic mission. We will enable our educators to innovate and collaborate within and across schools and parishes.

The entire Catholic community of the Diocese of Charleston will support Catholic school education as an essential ministry of the Catholic Church. Through its engagement, the community will enable schools to demonstrate excellence in all facets of operation: relevant and rigorous curriculum, differentiated instruction, accountability and efficiency at all levels, ongoing strategic planning, marketing, financial sustainability, adaptability to local needs, and responsible stewardship of resources and facilities.

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

IV. STRATEGIC GROWTH PLAN

Four planning areas drawn from the *National Standards and Benchmarks for Effective Catholic Elementary and Secondary Schools* were established at the outset of the planning process. This section presents the work of the Task Force in the four areas and includes purpose statements, recommended goals, and related strategies.

MISSION AND CATHOLIC IDENTITY

The Mission and Catholic Identity (MCI) Core Team aimed to develop a plan to further strengthen the Catholic schools of the Diocese of Charleston in their mission to bring children to Christ and His Church, encourage students to develop a mature commitment to lifelong discipleship, and inspire all Catholics in the diocese to embrace this mission.

MCI-1. Foster the lifelong discipleship and ongoing formation of students.

Strategies:

1. Continue to foster a life of prayer among students that will serve as a foundation for them for the rest of their lives. Maintain prayer at the beginning of the school day and at the beginning of class at the high school level. Provide opportunities for access to the Sacraments, Eucharistic Adoration, student leadership opportunities, retreats, study of the virtues, and opportunities to live the faith through service to the local and global communities. Promote an awareness of the unity of the Catholic Church by facilitating various forms of petitionary prayer among students and families.
 2. Build and maintain a culture of faith in every school by hiring a staff and faculty who embrace the mission and Catholic identity of the schools, who live the faith, and who are capable and comfortable witnessing to it.
 3. Integrate student religious formation into the religion curriculum and other subject areas. Emphasize how everything we study teaches us something about God and shapes our lived discipleship. Catholic insight must be integrated in every course and subject area:
 - a. In the natural sciences and mathematics, we experience a sense of awe and wonder at the glory and order of God's creation.
 - b. In history and social studies, we see the presence of God throughout history and particularly encounter the influential presence of the church in the past two millennia.
 - c. In literature and the arts, the themes of truth, beauty, and goodness always point to God, who is the preeminent fullness of each.
- Provide professional development to help teachers and administrators realize this vision.
4. Ensure that a plan to foster students' lifelong relationship with God is an integral part of the school's annual strategic plan.
 5. Explore ways to gather data on students' lived discipleship (e.g., faith practices, relationship to Jesus, service to others) to help schools establish data-informed goals and measure progress (and continuous improvement) over time. Consider examining long-term effects by collecting similar data from alumni. Use the data from both students and alumni to enhance Catholic identity and identify best practices to foster student formation.
 6. Bolster secondary school campus ministry. Schools could share a part-time campus minister with other schools or local parishes to strengthen the schools' evangelization efforts and pastoral care for students, families, and faculty (e.g., vocation club, rosary club, retreat team, parent and faculty faith formation).

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

MCI-2. Foster the lifelong discipleship and ongoing formation of teachers and leaders.

Strategies:

1. Create opportunities to recognize and underscore the notion of education as a ministry and vocation, not simply a job or occupation. Because prayer informs our beliefs, a commissioning service at the beginning of the school year (at the school or the parish) may help communicate an awareness of this calling among the faculty and the community as a whole.
2. Foster this sense of vocation by providing opportunities for teachers and leaders to share their faith with each other and draw connections between belief and everyday life in a way that is meaningful and edifying to them. Nurture personal awareness of the relevance of faith to one's ministry, teaching, and relationships.
3. Establish an ongoing plan to cultivate the faith lives of faculty and staff. Provide programming in-house, cooperate with other schools on shared in-service, and facilitate access to online programs for catechist training and continuing education and formation in faith.
4. The Office of Catechesis and Christian Initiation should collaborate with the schools to communicate and facilitate annual retreat options for teachers, catechists, and parish and school administration and staff. Pastors and principals should actively encourage attendance.
5. Bolster communication about formative activities that may interest teachers and school leaders:
 - a. Parishes and schools should notify local Catholic schools and the diocese when hosting speakers so invitations can be extended to other local parishes and schools.
 - b. The diocese should communicate promptly with the schools about diocesan and local opportunities.
 - c. Principals and pastors should effectively disseminate information about local parish opportunities for adult faith formation to staff, faculty, and families.

MCI-3. Strengthen and nurture parents to be effective evangelizers and catechists of their children.

Strategies:

1. Continuously affirm that parents are the primary catechists of their children and that the family is a center of faith and the domestic church. The primacy of parents means that our role as educators in the school is as a partner in the education of their child.
2. Offer opportunities for parenting formation by facilitating these at the school or connecting parents with opportunities offered in local parishes or the community. This includes suggesting online courses and resources to better equip them as primary catechists.
3. Emphasize family evangelization by offering opportunities for family participation in service projects, worship, and liturgy. Integrate faith formation opportunities with parent meetings.
4. Establish collaborative programming among the schools, sponsoring parishes, and all regional parish catechetical ministries. For instance, schools could cooperate with parishes to offer an annual half-day retreat for parents and families.
5. Equip students to be evangelizers of their families. Extend classroom lessons about the faith to the home through assignments and activities that foster dialogue and other ways to grow in the faith as a family.
6. Celebrate the various cultural backgrounds of the school and local community at school events. Effective evangelization addresses the person in his or her present reality, beginning with the affirmation of all that is good in his or her cultural background.

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

MCI-4. Make certain that all clergy of the diocese recognize Catholic schools as an integral part of the mission of the church.

Strategies:

1. Structure a conversation among clergy at presbyteral and deanery meetings to affirm that our schools are an integral part of the evangelizing mission of the church as a whole. Envision ways that schools and parishes in the deanery could enhance one another's ministries through mutual cooperation.
2. Pastors and administrators of schools must take the initiative to invite and engage pastors and clergy from parishes without schools to be part of their school community. A regular presence of visiting clergy could involve, but not be limited to, offering Mass, hearing confessions, guest teaching, and participating in special events and vacation bible school.
3. Local pastors who do not have a parish school should make every effort to cultivate pastoral involvement with the schools in their regions. This can take the form of outreach service, faith formation, or participation in social events.
4. Create collaborative partnerships among every parish and the schools in the deanery. Our schools are the responsibility of the church as a whole and not simply that of parishes with schools on their campuses.

MCI-5. Inspire all of the lay faithful of the diocese to recognize Catholic schools as an integral part of the mission of the church.

Strategies:

1. Ensure regular communication and prominent visibility of the schools as a vital ministry at sponsoring parishes and other local parishes. Develop a clear communication plan and meaningful collaboration with local parishes, as articulated in more depth in MCI-1 and MCI-7.
2. Actively promote the school throughout the church and community. Use all forms of media and technology (radio and television commercials, social media, print and digital advertising) to get the message out to everyone in the community. Diocesan communications and media (e.g., *The Catholic Miscellany*) should be used toward this end. An example is to develop promotional videos for Catholic Schools Week similar to those used during the Bishop's Annual Appeal. These videos could be showcased on the Diocesan Catholic Schools website and shown by schools at sponsoring and regional parishes.
3. Invite the faithful from around the diocese to participate in school events, faith formation activities, and special liturgies. Continue to highlight the evangelization mission of the school and how it embodies Catholic culture.
4. Encourage volunteerism. Students, parents, and families should be encouraged to serve in the community, especially the parish community. Conversely, local parishioners and community members should be encouraged to serve at the school in appropriate capacities.
5. Regularly engage alumni with news on the school and invitations to special events. In all communications, highlight concrete examples that demonstrate the lived mission of the school.

MCI-6. Continuously invite parents, staff, and faculty to embrace fully the mission of the school.

Strategies:

1. Identify, clarify, present, and communicate the school's mission, from which the school's ministry flows, at all school functions. The mission statement should be prominent on campus, in advertising, and in correspondence. To fulfill its role, the mission statement should be actively promoted and constantly referenced.

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

2. Discern how current and future initiatives relate to the school's mission statement. Reflect on how each initiative enables us to fulfill that mission.
3. Motivate faculty to discuss the mission statement and articulate examples of how they see the mission embodied throughout their school day.
4. Nurture the faith lives of parents and faculty as an extension of the school's mission. Further articulation of this recommendation is in MCI-2 and MCI-3.
5. At least every five years, review the mission statement to ensure that it remains fresh and relevant. Facilitate a process to engage key constituencies (i.e., teachers, parents, school board, parishioners) in a periodic conversation to review and refine the mission statement.

MCI-7. Improve integration of the school and parish ministries.

One of the most damaging wounds in our church is the division of parishes into the school community and the church community. Pastors, school leaders, and parish leaders must work together in substantive and meaningful ways to support our schools as a vital ministry of the church.

Strategies:

1. All pastors should communicate in varied and regular ways how Catholic schools are an integral ministry of the church.
2. Promote collaboration among school and parish catechists by sharing expertise and providing combined in-services. Ensure the school administrator is included in key parish leadership meetings. Consider forming one team of school and parish catechists to oversee religious education at both venues.
3. Make every effort to maintain the school's visible presence at and meaningful connection with local and regional parishes. School leaders should make regular enrollment appeals and share school news at local and regional parishes in person, in their bulletins, and through other media. Provide prominent hyperlinks on school and parish websites and social media that connect readers to affiliated parishes and schools.
4. Pastors should compile and provide staff and volunteer contact information to the ministry leaders within the parish and school and more importantly encourage their collaboration. For example, parish groups like the Knights of Columbus and Women's Club could volunteer at school events; similarly, students and families could help at parish events.
5. Appoint school representatives to sponsoring and regional parish councils and parish representatives to school boards.
6. Schools should provide service opportunities for students and families that help the local parishes or parishioners.
7. Students and families should be directed to the ministries at their local parishes and encouraged to become active parishioners.

MCI-8. Deepen the schools' commitment to and embodiment of the social dimension of the Gospel, reinforcing how the Christian life is a lived discipleship.

Strategies:

1. Continue to strive to serve the underserved and vulnerable in our community.
2. Prioritize tuition assistance for low-income families, families with multiple children in school, families with parents who work for the Catholic Church, and families with special needs children.
3. Welcome the ethnic cultures of the community. It is imperative for each school to become familiar with and sensitive to the varieties of cultures in the community. Welcoming individuals from these groups can involve incorporating the language of the culture. More important, it involves cultural sensitivity, including understanding the history, customs, and salient values of each culture.

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

4. Constantly seek new ways to incorporate service into school activities through student-led projects, school-wide efforts, grade-specific projects, and family activities.
5. Foster an awareness of global connectivity. Give students and families opportunities to help those in need both in their own community and the world community.
6. Explore ways the Diocesan Office of Social Ministry and Catholic Charities could collaborate with the schools on providing service opportunities for students and families and other enrichment opportunities to integrate knowledge of the social teachings of the church with service and action.
7. Continue to develop a social justice curriculum that blends academic knowledge of justice with opportunities for service and action.

MCI-9. Strengthen outreach to and inclusion of students and families of other faith traditions.

Strategies:

1. Promote a sense of belonging among all members of the school community, regardless of religious background. Highlight ways that diversity enhances our Catholic identity. Promote understanding and mutual respect among those of different religious traditions in the classroom and school community. Underscore the notion that part of living our Catholic identity is to be ecumenical.
2. Invite religious leaders of students and families affiliated with a religious tradition other than Catholicism to the school community for an evening of prayer or other activity to celebrate elements of our Catholic faith that we share with our fellow Christians and those of other faith traditions.
3. Use the school as a platform for ecumenism and interreligious dialogue. Schools could promote and participate in activities and initiatives sponsored by the Diocese of Charleston Ecumenical and Interreligious Affairs Commission. Host special activities or events to promote dialogue characterized by mutual respect. Highlight significant points of convergence and divergence to foster mutual understanding.
4. Welcoming people of other faith traditions not only opens up a potential area of enrollment growth, but it is also an important exercise of evangelization, Christian charity, and hospitality.

OPERATIONAL VITALITY

*Faith-filled, vibrant, and growing Catholic schools require a commitment to effective and efficient operations. This operational plan is the foundation for achieving academic excellence and fulfilling our Catholic mission. The **Operational Vitality (OV) Core Team** defined the keys to this plan as follows:*

- *Foundational strategic framework to organize and plan our efforts*
- *Actionable enrollment and retention plan (branding and marketing)*
- *Efficient operational model (including facilities optimization)*
- *Impactful financial model*
- *New controls and measures scorecard process to track and monitor our progress at both a diocesan-wide and school-specific level*

A critical goal is to enable schools and the diocese to assess these areas objectively and holistically in order to recommend strategies and tactics that are based not only on our love of the Catholic Church, but are also relevant, differentiated, and actionable.

Without operational vitality, a school cannot be sustained over time even if it has strong Catholic identity, dedicated teachers, and rigorous academics. The historical parish school model is not sustainable; the market has changed too much over the past decade. We acknowledge that Catholic education fails to achieve its mission if its availability, commitment to academic excellence, and faith-centric experience depends on a school's size, geographic location, or family income levels. This plan recommends many changes to our current operational strategy. These changes will be hard and require an open-mindedness to new operational, marketing, and financial models. It will also require a greater investment in time, talent, and financial support from the diocese. While South Carolina has many social needs, the diocese must consider which should be addressed by the diocese and which can be better met by other agencies.

To accomplish our mission over the long term, the time to lead these strategic efforts is now. A well-considered strategy, successfully executed, maximizes impact within the constraints of available resources. As we strive to accomplish our objectives for Catholic schools in South Carolina, three strategic imperatives will be the foundation of our success:

- Prioritize Catholic education across the diocese.
- Prioritize the key strategies that leverage our core competencies and are feasible.
- Develop a framework to more effectively and efficiently make decisions to advance our schools.

No one model can successfully apply to every school in the Diocese of Charleston; each school has unique dynamics, trends, market opportunities, and performance. To operate effectively and efficiently, however, we must identify best practices across these schools and take appropriate action at the school level.

STRATEGIC FRAMEWORK

OV-1. Identify and use key metrics for school performance and market potential that apply across schools and allow us to assess our schools in strategic clusters.

Strategies:

To cluster diocesan schools, two weighted indices to measure each school's success and potential were developed based on relevant data:

1. The School Health Index focuses on the performance of each of school based on the following key measures:
 - Academic performance

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

- Enrollment growth and retention
 - Financial sustainability
 - Stakeholder satisfaction and loyalty
2. The Market Potential Index analyzes the potential of each market recognizing that these are less controllable and largely driven by the region or area in which each school competes. This index is based on the following key measures:
- Population
 - Market growth
 - Income levels

NOTE: These inputs are expected to change over time as more relevant and consistent data become available on school performance and market opportunity.

OV-2. Cluster our schools based on these fact-based measures to identify best practices and strategies by cluster.

Strategies:

Using these two weighted indices, we can create a clustering framework with which we can make future decisions:



A preliminary assessment of our schools indicates that this framework is viable and can define specific strategies for the diocese and its schools going forward (details to be provided upon implementation). In summary, 14 schools fall in cluster 4 and 19 are in clusters 1, 2, and 3, which means there are significant opportunities for improved performance for more than half of our schools.⁵

Our first goal is to support schools in clusters 1 and 4 as they defend their relatively strong positions. Our second goal is to develop strategies for the schools in clusters 2 and 3 to move vertically by successfully enhancing their performance in their specific markets.

⁵ To produce a holistic assessment of the schools and a true validation of the indices, the clustering analysis involved all 33 schools in the Diocese of Charleston (including the two private schools that were not part of the planning process).

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

OV-3. Provide the diocese and school leaders with an overview of school improvement today by clusters and a framework for local adaptation that drives success in the future.

The various markets in South Carolina vary greatly in their profile and potential (see four clusters identified above). To achieve our Catholic mission, weaker markets may be identified as strategically important.

However, the diocese must recognize that different business models and financial and operational plans are required to support these mission-centric efforts.

Strategies:

Cluster 1: Defend (Strong School Health in Lower Potential Market)

Key strategies:

- a. Schools must aggressively market points of difference compared to the competition.
- b. Schools must develop strong retention strategies to ensure that once students are secured, they remain loyal to the school.
- c. Schools must add academic and extracurricular programs to compete.
- d. Schools must maintain affordability and minimize annual tuition increases.

Cluster 2: Viability (Lower School Health in Weaker Potential Market)

Key strategies:

- a. The diocese will assess the viability of these schools individually via an independent task force.
- b. A competitive analysis should be completed as part of the assessment to understand potential market gaps, needs, and points of difference. If a gap is found, a niche strategy should be developed to establish a competitive and differentiated position.
- c. Schools and the diocese must identify and secure incremental revenue sources to sustain operations if the school is deemed viable and important to our Catholic mission.
- d. Marketing priorities must focus on new enrollment and leverage the points of difference.

Cluster 3: Develop (Lower School Health in Strong Potential Market)

Key strategies:

- a. Assess retention and enrollment trends and causality.
- b. Conduct analysis of the school's leadership, facilities, and faculty to determine possible drivers of underperformance.
- c. Each school should better market and communicate its point of difference compared to specific competition (see marketing recommendations).
- d. These schools may require an incremental investment in marketing once drivers of underperformance are identified and addressed.

Cluster 4: Invest and Grow (Strong School Health in Strong Potential Market)

Key strategies:

- a. These schools warrant prioritization on facility upgrades.
- b. Teaching and academic excellence should be each school's first priority and exceed statewide and national norms. Once excellence is achieved, the diocese and each school should take credit for these accomplishments in all marketing activities.
- c. Investment in additional extracurricular academic, athletic, and art programs should be a priority at these schools and serve as a test for expansion into other diocesan schools.
- d. Tuition increases should be explored annually at a moderate level, but executed only in the context of the competitive situation and market trends.
- e. Marketing efforts should focus initially on enrollment and continue until each school is at capacity (preferably with a waiting list). At that point, marketing activities should prioritize retention efforts.

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

This clustering strategy and the corresponding metrics that define it provide a framework for regular monitoring, tracking, and assessment of school performance. This clustering framework is the foundation for the remaining Operational Vitality recommendations and should be considered as the diocese implements changes in its future strategy.

ENROLLMENT AND MARKETING

OV-4. Specify marketing objectives and corresponding strategies for each school.

Strategies:

Each school, with the support of the diocese and a marketing guide, will articulate specific strategies and tactics to meet **three core marketing objectives** critical to short- and long-term success:

1. Drive new student enrollment (particularly for school clusters 2 and 3).
2. Retain current students (particularly for school clusters 1 and 4).
3. Reengage alumni.

OV-5. Define South Carolina Catholic school points of difference and parity compared to competitor schools.

New Net Promoter Score research fielded in late 2014 (see Appendix D) provided critical insights on the attitudes and perceptions of our key stakeholders. This research identified that across constituents and regions our Catholic schools are NOT meeting their expectations and guided us in developing the recommendations in this plan.

The decentralized structure of the diocese results in independent marketing activities at each school. A review of marketing activities and materials showed that messages tend to fall into one of four categories:

- Catholic Academics (e.g., *Knowledge Today and Values for Life, Where Faith and the Sciences Excel, Educational Excellence and Spiritual Strength, Excellence in Education/Respect for Life*)
- Emotional (e.g., *School with a Heart, Heart Speaking to Heart, We Believe...*)
- Tradition (e.g., *Academic Excellence since 19XX, Continuing the Excellence, Legacy of Learning, Where Tradition and Innovation Unite, Tradition-Virtue-Excellence*)
- Inspiration (e.g., *Learning to Reach for the Stars, Faith-Love-Learning, Inspire Excellence, Nurture-Challenge-Achieve, Weaving a Bright Future, Where Children Experience Success, Building a Foundation for Life, Discover the Imagination, Imagine the Discovery*)

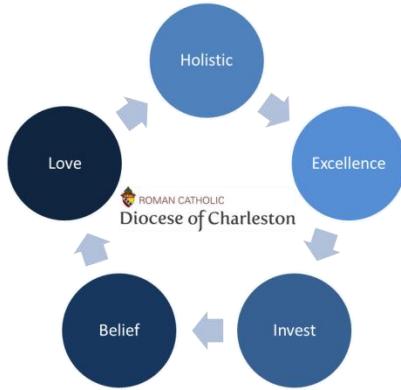
Although none of these approaches is wrong, the question is whether any of them optimize the school's targeting strategy and competitive situation. Our goal must be to identify what will motivate a family to embrace each school instead of another educational option, such as public school, home schooling, or other private school. That is our point of difference!

Strategies:

A brand or product (e.g., a school) is defined by its value proposition, which defines the key points of difference compared to the competition. The key to a strong value proposition is not just a focus on features or attributes (e.g., 30 minutes of religious education a day, a new building, high test scores), but also on benefits to and values of target families. We want to build an emotional connection with our key stakeholders based on real benefits. This type of relationship will increase our Net Promoter Scores and ultimately create strong brand advocates for our schools. Often, a value proposition is not defined by a single attribute, but by a combination of benefits.

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

Catholic schools in South Carolina have a value proposition based on a combination of strategic pillars that make us unique. These five pillars, derived from the Task Force's assessment and related research (see Appendix D), are illustrated below:



Based on these five pillars, we can develop a consistent approach to communicating our points of difference to our key stakeholders. Some schools may choose to prioritize certain pillars over others, but in our communications (both verbal and nonverbal) our emphasis should be on leveraging all these points to some degree as *our value proposition is defined by the combination of all five and not any one pillar.*

The following are key considerations as we define and embrace this new value proposition for our schools:

- Our parents and other constituent groups expect these qualities from a Catholic school experience. Today, based on our Net Promoter Scores (see Appendix D), we are NOT consistently meeting these expectations.
- Our goal must be to make decisions across the four planning areas—Mission and Catholic Identity, Academic Excellence, Governance and Leadership, and Operational Vitality—as we strive to meet these expectations.
- Just saying these things does not mean we are delivering them. We must “talk the talk” and “walk the walk.”

OV-6. Define a Catholic school's brand identity via an actionable value proposition based on relevant points of difference.

As we define our brand identity going forward, we must consider that we are shaping this identity with a variety of stakeholders:

- Current parents and children (and extended families)
- Potential parents and children (especially Hispanic families)
- Diocesan school alumni
- Parishioners (non-school families)
- Priests and church leaders
- School teachers and staff
- Community leaders and politicians
- Press and community influencers

Once a value proposition is defined and embraced, the next step is to create a brand identity that can be consistently communicated to these various key stakeholders. Our pillars are the same for each constituent group, but the message can vary slightly as long as all five pillars are included.

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

Strategies:

The Catholic schools value proposition is based on our five pillars. This positioning has been developed through a creative assessment of the Net Promoter Score research (see Appendix D), school insights and performance, and other relevant data. It is unique and proprietary to the diocese schools. The illustration below summarizes our point of difference and benefits and ultimately guides development of relevant and motivating messaging to potential parents.



The interpretation of this recommendation is as follows:

Pillar: Our key points of difference with the combination defining our value proposition

- It's the foundation of our brand identity!

Value: The tangible value that we deliver to our target audience

- It's what a diocesan school promises to do every day!

Benefit: The intangible and more emotional benefit for our target

- It's our promise to you (our stakeholders)!

Message: Summarizes the value and benefits in a simple message that motivates our target audience to support Catholic education

- It's why Catholic education is important to our stakeholders!

Promise and personality: The essence of our brand

- It's the promise we make and the tone we use (both verbal and nonverbal); it's how we want people to describe us and who we strive to be!

Using this marketing framework, each school will identify the optimal approach for its market, target audience, and competitive situation. One example of a messaging approach that integrates all five pillars and the overall message we want to communicate is as follows:

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

WE BELIEVE.

We believe in your children, their future and their potential.

We believe in our priests, our administrators, our teachers, and our parents as inspiring a child to reach his or her full potential. This takes a commitment by all, not one.

We believe in our schools and their ability to provide a safe and nurturing environment.

We believe in the Catholic Church, whose future is the children.

We believe in God and His belief in each of us.

OV-7. Identify the optimal target market and better reach these segments with a relevant message that leverages our points of difference.

Strategies:

1. Each school must conduct a comprehensive assessment and define its enrollment profile, market dynamics (including competitive assessment), and regional family demographics.
2. The optimal marketing strategy at each school must directly define a plan to successfully meet the three core marketing objectives identified previously (OV-4).
 - a. New student enrollment—strategy depends on cluster
 - i. Cluster 1—Good School/Weak Market
 - Focus on overcoming critical barriers (identify for each school in cluster).
 - Explore expanded preschool, extended care, and other programs that address specific needs in the community.
 - Research targeted marketing efforts to underserved families.
 - Provide aggressive referral incentives for current families.
 - ii. Cluster 2—Underperforming School/Weak Market
 - Identify key points of difference compared to the competition.
 - Test specific marketing efforts to niche consumer segments.
 - Provide aggressive referral incentives for current families.
 - iii. Cluster 3—Underperforming School/Strong Market
 - Be committed to making leadership and positioning changes, if appropriate.
 - Identify our points of difference and communicate consistently to the appropriate target market.
 - Provide aggressive referral incentives for current families.
 - iv. Cluster 4—Good School/Strong Market
 - Quantify our success AND communicate it!
 - Develop strong parent and community engagement programs.
 - Identify competitive options and directly communicate our points of difference.
 - Invest in extracurricular activities and new curriculum areas as tests for expansion to other schools.
 - Prioritize financial investment (e.g., facilities) in these schools.
 - v. Specific Targeting Strategy: Hispanics (across clusters)
 - A first step for the diocese is to validate Hispanic attitudes and motivations to understand the underlying reasons for not choosing Catholic schools.
 - Work with parish Hispanic ministries to promote Catholic schools as an option for their children.
 - Leverage parish religious education programs and community events to reach potential Hispanic families.

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

- Identify faculty and staff who can work as points of contact for the Hispanic community.
- b. Current student retention
- i. Everyone has a role in helping ensure student and family retention:
 - Teachers and staff
 - a. Each school must emphasize that every child and family matters and must be respected and welcomed at every interaction.
 - b. All administration and staff should attend annual customer relationship management training coordinated by the diocese.
 - c. Conduct workplace satisfaction research every other year across all schools.
 - d. Conduct an assessment of transportation needs at a regional level.
 - e. Develop after-school programs based on family needs and expectations, not just school preferences.
 - f. Provide retention incentives to principals and teachers.
 - Current families
 - a. Develop ongoing and annual mechanisms to solicit parent feedback and input (beyond school advisory boards).
 - b. Develop programs that offer retention incentives for parents (see OV-11 and OV-12).
 - c. Conduct independent exit interviews with any departing parents to understand possible issues.
 - d. Conduct an annual survey of all families with a focus on satisfaction scores, improvements, and risks to future relationship.
 - Catholic parishioners (non-school families)
 - a. The importance of Catholic education must be a constant theme in all parishes and constantly reinforced by priests and principals.
 - b. Identify specific strategies to showcase that the entire diocese has a strong sense of belonging in our schools.
 - Local School Advisory Board
 - a. These key stakeholders are ambassadors for Catholic education and should have expanded authority and accountability.
 - b. While this group could be a resource to conduct exit interviews, we recommend that these be managed by the diocese, if possible.
 - c. Encourage these volunteers to share their Catholic identity and role on the board in internal and external marketing efforts.
 - d. Don't turn away a volunteer. If someone wants to get involved, find a way for that person to help.
- c. Alumni reengagement
- i. The diocesan offices should maintain a central database of all school alumni (with a volunteer or full-time development position).
 - ii. A distinct value proposition will be developed for each school to use in communicating with alumni based on our five communication pillars.
 - iii. The diocesan family needs to be welcoming in all alumni outreach and engagement efforts (e.g., personal invitations to key events).
 - iv. Social media groups (e.g., on LinkedIn and Facebook) should be developed for each school to reengage alumni that we've lost touch with over the years. The format and plan should be established by the diocese and executed at the school level.
 - v. Each school should have an annual alumni recognition and engagement event at which our alumni are the focal point.

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

OV-8. Ensure consistent and efficient communication of this brand identity across the diocese and at each school (regardless of strategic cluster).

Strategies:

1. It is strongly recommended that a marketing resource be added at the diocese as a leadership resource for the schools to ensure consistent use of this marketing framework, efficient media planning and buying, and establishment and enforcement of new brand guidelines. We do not recommend a centralized approach to marketing implementation.
2. Ensure consistent, differentiated, and motivated communications across the diocese and at each school based on the five pillars and supporting values and benefits defined above. This can be validated and enhanced via consistent execution of ongoing customer and parent research (see OV-10).
3. This new diocesan resource can also identify and recommend third-party suppliers to support Web, digital, mobile, and traditional media implementation, ensuring both effective and efficient communication efforts.

OV-9. Develop an effective and efficient integrated communication strategy using a combination of traditional and digital media (e.g., billboards, print, Web, social, mobile).

School marketing efforts across the diocese are highly fragmented. All schools have a website and a recruiting document or package. A few leverage digital and social media for marketing purposes, while a few others use traditional media. Most schools appear to depend heavily on word-of-mouth and grassroots marketing efforts. Coordination and success across these efforts vary greatly and are limited.

Strategies:

1. Media strategy and corresponding messaging should be based on our three marketing objectives:
 - a. New enrollment
 - i. Focus on where parents go for information on education and schools, including search engines, Web, social media, relocation guides, public relations materials, and referrals.
 - ii. Explore English and Spanish media options (the latter to reach Hispanic families), depending on the market profile.
 - b. Retention
 - i. Key vehicles will include the Web, social media, events, and newsletters.
 - ii. Personal interaction, parent meetings, school community events, and confidential opinion or concern vehicles will also be important to driving retention.
 - c. Alumni engagement
 - i. Once a formal process is in place to reengage alumni, a variety of vehicles will be used to reinforce this important connection, including newsletters, annual recognition events, social media groups, and group scholarship programs.
2. Word-of-mouth is critical, so social media, grassroots marketing programs, community events, and referral programs are key elements of the diocesan marketing program.
3. With restricted budgets, free media should be a priority in any plan, including public relations, social media, digital platforms, and leveraging of events.
4. Traditional media should be used selectively. It tends to be costly and focuses on populations that may not be in our target groups.
5. To address budget challenges, consider marketing grants for nonprofits (e.g., Google grants to support search engine optimization strategies).
6. Most important, each school should follow the brand guidelines and ensure consistent messaging, regardless of media platform.

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

OV-10. Better understand why families choose to stay in Catholic schools and why they choose other educational alternatives.

Strategies:

The optimal solution should focus on our *three core marketing objectives* and be implemented at each school, regardless of its strategic cluster:

1. Drive new student enrollment (study importance).
 - a. The diocese will conduct an independent, statewide market survey (with regional quotas) of families and parishioners on what attributes are important in choosing a school, their expectations of a school on a variety of importance variables, and their school choice.
 - b. In this research, a sample of the Hispanic population that is NOT choosing a Catholic education should be included to understand how we can better provide an educational experience for and a stronger marketing effort in this important community.
2. Retain current students and teachers (study satisfaction).
 - a. The diocese will commission an annual customer satisfaction survey of parishioners, teachers, and current families to understand satisfaction with programs, schools, and leadership.
 - b. This survey will be conducted independently with a relevant sample for each school.
 - c. Results across the diocese will be shared first with diocesan stakeholders, followed by separate reports for each school.
 - d. A formal process (independent of school leadership) will be developed to conduct exit interviews for any family choosing to leave a school.
3. Reengage alumni (keep database current).
 - a. The diocese will help identify and implement a customer tracking software package to better track alumni. This new database can be used for ongoing communication to alumni about events, opportunities, and recognitions.
 - b. At graduation from high school, as well as one year and five years later, we should survey students to understand their attitudes toward such topics as their Catholic school experience and their future plans.
 - c. Formal programs should be integrated in the event calendar at every school to recognize and engage successful alumni.

OV-11. Enhance retention by making the transition from elementary to middle to high school as seamless and exciting as possible (e.g., announcements, mentor programs, transition years).

Strategies:

1. Establish a formal mentor program across the diocese between secondary schools and each student in our fifth-grade feeder schools.
2. Offer extracurricular opportunities to fourth- and fifth-graders during the school year (e.g., camps, tag-alongs).
3. Offer incentives for early enrollment for the first year in the secondary school.

OV-12. Integrate an enrollment incentive plan connected to tuition to ensure multiple children and multiyear family loyalty (e.g., a loyalty program).

Strategies:

A diocesan-supported loyalty program will create a more direct link across schools, so funding for these programs should be developed at the diocesan level. The following are recommended incentive programs to encourage loyalty (e.g., retention) to Catholic schools:

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

1. Family loyalty program for multiple children
2. Financial incentives for students transitioning to secondary school
3. Discounts for parish, school, and diocesan employees

OPERATIONAL MODEL

OV-13. Ensure that a formal, detailed, consistent, and transparent budget (at the school level) is available to all stakeholders as a foundation for meaningful future strategies and tactics.

Strategies:

1. Determine for each school the incremental costs associated with today's enrollment versus maximum effective enrollment.
2. Identify a standardized accounting software platform to save time, effort, and money. Once a platform is implemented, schools will report on financial results quarterly via a consistent template.
3. Identify and present, in the operating expense portion of this template, expense categories for the schools in the areas of personnel, facilities, educational materials, financial aid, and marketing.
4. Conduct a gap analysis to show the specific needs of each school.
5. By school, review areas such as teacher pay methodology, benefits offered, and tuition discounts for faculty members' children to find uniformity and better convey to faculty their total compensation package.
6. Evaluate the ever-increasing cost of health care to assess the effectiveness of and variance in schools' approaches to managing health plan costs and subsidies.

OV-14. Spend consistently based on objectives defined by the clustering strategic framework.

Strategies:

The clustering framework defined previously is the foundation of our operational plan. Each school should manage expenses based on the cluster's appropriate strategy.

Cluster 1: Defend (Strong School Health in Lower Potential Market)

Key strategies:

- a. Efficiency is key to this cluster, including preferred vendor contracts, shared school services, and combined purchasing.
- b. Metro area schools should work to maximize enrollment effectiveness across the area.
- c. Establish contingency plans to support these mission-critical schools.

Cluster 2: Viability (Lower School Health in Weaker Potential Market)

Key strategies:

- a. Efficiency is also key for this cluster. Preferred vendor contracts, shared school services, and combined purchasing are all priority tactics for schools in this cluster.
- b. If a niche strategy is required for a specific school to increase viability, additional marketing, administrative, and faculty funding may be required from the diocese.
- c. Metro area schools should work to maximize enrollment effectiveness across the area (e.g., niches, shared transportation costs, combined purchasing, advertising).
- d. The diocese should have contingency plans to support these mission-critical schools.

Cluster 3: Develop (Lower School Health in Strong Potential Market)

Key strategies:

- a. Once a situation assessment is complete, a long-term strategy and operational plan to improve school strength are required.
- b. The long-term strategy may require investments in new leadership, facilities, programs, and faculty to improve performance (will vary by school).

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

- c. One area of focus should be better marketing and communicating points of difference compared to specific competition.

Cluster 4: Invest and Grow (Strong School Health in Strong Potential Market)

Key strategies:

- a. Although opportunities to improve efficiency exist, the priority for this cluster is to maximize academic and financial effectiveness.
- b. These schools should be priorities for new and/or improved facilities.
- c. Teaching and academic excellence are each school's first priority and should exceed statewide and national norms.
- d. Investing in additional extracurricular academic, athletic, and art programs should be a priority.
- e. Marketing efforts should focus first on achieving capacity, then on ongoing retention efforts.

OV-15. Minimize operational expenses by developing diocesan-wide purchasing, marketing, and operational efforts, while maintaining seamless implementation at the school level.

Strategies:

1. Study relevant expense areas that could benefit from combined purchasing strategies and review vendors used across the diocese to identify possible efficiencies.
2. Create a preferred vendor process to share with potential vendors and detail expectations for vendor support and performance.
3. Facilitate regional studies to identify shared resource opportunities.
4. Establish a diocesan clearinghouse for schools to share resources. For example, schools with lower enrollments may have extra books that can be made available to schools needing them, with expectations of reciprocity.

OV-16. Ensure that our educational facilities provide the environment needed to deliver excellent academic and faith leadership.

Strategies:

1. Conduct a school facility assessment to identify the most pressing needs. Facility prioritization will be given to schools in cluster 4, followed by cluster 3 (if identified as a barrier to growth), because of their market potential.
2. Review capital needs (i.e., building repairs, furniture, grounds, technology).
3. Budget adequately for capital repairs and maintenance.
4. Conduct regular safety audits, energy reviews, and roof inspections.
5. Ensure all planning includes feasibility studies that take into account demographics and demand, financial projections of operational vitality and sustainability, and architectural planning, including site identification.

FINANCIAL MODEL

OV-17. Identify the key sources of future revenue and establish realistic and impactful targets for each school.

Strategies:

1. Key sources of future revenue and target support levels are defined as follows:
 - a. Tuition: Currently, 61.6% of total school revenue is derived from tuition.

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

- i. Schools in clusters 3 and 4 should develop plans to deliver 70% of revenue from tuition within five years.
- ii. Schools in clusters 1 and 2 should maintain or achieve at least 60% of revenue from tuition within five years.
- b. Parish subsidies: All parishes directly supporting a school (host and feeder parishes) will develop a financial plan to deliver a standardized parish subsidy (as agreed upon by the diocese). The Strategic Growth Plan Implementation Task Force will be charged with understanding current support and making a recommendation that advances financial support of Catholic education across the diocese.
- c. Diocesan subsidy: Increase the allocation of revenue from the Bishop's Annual Appeal to support Catholic school education.
- d. Philanthropy and development: The average amount of revenue from school-level development efforts is 29% (based on a range of development levels from 2% to 39%).
 - i. Schools in clusters 4 and 3 should target at least 30% of revenue from development efforts within three years.
 - ii. Schools in clusters 1 and 2 should target at least 20% of revenue from development efforts within five years.
- e. Federal and state government grants:
 - i. Maximize appropriate federal and state government funding sources.
 - ii. The diocese and our schools should invest in significant improvements in grant writing capabilities, particularly focused on supporting schools in clusters 1 and 2.
 - iii. Leveraging these new grant writing capabilities, the diocese should proactively target tuition assistance grants:
 1. Schools should collaborate with the St. Thomas Aquinas Scholarship Funding Organization to identify, diagnose, and support exceptional needs children throughout South Carolina.
 2. South Carolina First Steps to School Readiness, the state's comprehensive early child education initiative, is a public-private partnership that permits children to attend private 4-year-old kindergartens on a state voucher.
 3. Schools with appropriate facilities should consider additional services for autistic children, leveraging Ryan's Law funds.

OV-18. Leverage the clustering framework to direct school revenue-generation priorities.

Strategies:

1. The importance and priority of each revenue stream will vary based on each school's clustering strategy. Below is a summary of important revenue sources by cluster.

Revenue Source	Cluster 1 (Strong School in Weaker Market)	Cluster 2 (Weaker School in Weaker Market)	Cluster 3 (Weaker School in Strong Market)	Cluster 4 (Strong School in Strong Market)
Tuition	+	+	+++	+++
Parish Subsidy	++	++	+++	+
Diocesan Subsidy	+++	+++	+	+
Development/Foundation	+	+	+++	+++
Grants	+++	+++	+	+

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

OV-19. Maximize revenue through a tuition strategy that is based on the perceived and actual value of a Catholic education versus absolute low or high price.

Strategies:

1. Establish a formal plan at each school to maximize enrollment and tuition. Each school will determine and report on its maximum effective enrollment levels by grade.
2. Formalize a unique and actionable marketing plan for each school based on the guidelines outlined in this report.
3. Establish a tuition covenant with parents that reinforces the school's and parish's commitment to Catholic education and the parents' commitment to make an investment in the school.
4. Require tuition charges to cover at least 80% of payroll and benefit costs of the school at a minimum. Use subsidies, grants, and fundraising to cover the balance, or earmark the savings they provide for capital projects or endowments.
5. Apply tuition discounts for Catholic parishioners regardless of parish to reinforce that Catholic education is important to the entire Catholic community.
6. Ensure that all Catholic schools in a market have tuition rates that differ by no more than 5%. This will reduce direct competition between our schools.
7. Explore the use of a third party vendor to process and manage tuition payments.
8. Consider implementing flexible payment arrangements as a means to increase enrollment of underrepresented, economically challenged groups.
9. As part of a sound financial model, evolve our financial aid program, including each school identifying its breakeven enrollment level, determining financial aid priorities by clustering strategy, ensuring that financial aid revenue is allocated only from subsidies and grants (not tuition), and ensuring that any financial aid is consistent with diocese and school targeting priorities.

OV-20. Develop a formal philanthropic strategy to maximize fundraising efforts across constituent groups.

Strategies:

1. Assess each school's fundraising activities, results, and capabilities.
2. For each school, develop a unique annual appeal initiative with clear communication of the school's strategy, priorities, opportunities, and challenges.
3. The Diocese will assist in determining the common and unique needs of the schools across the diocese and leverage best practices to identify sources of philanthropy (e.g., foundations, grants) to address those needs. These assessments will be used to develop workshops, webinars, recommended guidelines, and school-specific consultation to strengthen development efforts at and across the schools.
4. Focus on one or two major events a year and shift remaining efforts to tuition optimization, other development efforts (e.g., annual appeal), and marketing. Prioritize all multiple fundraisers at the school level. Eliminate ineffective initiatives.
5. In each school's strategic plan, develop specific activities and opportunities to engage nonparent support for school efforts (e.g., alumni, corporations, local businesses).
6. Identify and implement a capital campaign at each school and manage it in collaboration with diocesan leadership.

OV-21. Establish a Catholic Schools Foundation to oversee a new diocesan-wide Catholic school endowment fund and coordinate other philanthropic priorities.

Strategies:

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

1. Establish a foundation as an independent 501(c)(3) modeled on the efforts of other dioceses, such as Boston's Catholic Schools Foundation, Chicago's Big Shoulders Fund, and Seattle's Fulcrum Foundation.
2. Build an endowment to support tuition assistance and other priorities. Raise investment through a Catholic Education Annual Appeal that targets parishes and philanthropists across the diocese.
3. Secure assistance from foundation staff in grant writing and coordinating other philanthropic initiatives related to Catholic schools, such as the St. Thomas Aquinas Scholarship Fund and Elizabeth Ann Seton Fund.
4. The foundation director will assist the Catholic Schools Office in securing funds, providing training, and coordinating local school development/advancement efforts across the diocese (see OV-20).

CONTROLS AND MEASURES

OV-22. Leverage the clustering framework to define key measures to control and track our progress by upgrading our technology and data collection platform.

Strategies:

1. Adopt a common, centralized data management system for each school (identified and implemented by the diocese).
2. Track measures at the school level at least annually and complete a diocesan-developed template so that all reporting is consistent and easily reviewable. This template will include measures in the following areas:
 - a. Academic performance
 - b. Enrollment growth and retention
 - c. Financial sustainability
 - d. Customer satisfaction and loyalty
 - e. Population
 - f. Market growth
 - g. Income levels
3. Update the clustering strategic framework annually to assess school progress toward our strategic objectives.

OV-23. Understand enrollment, retention, revenue, and expense trends by school. Compare to national and regional best practices.

Strategies:

1. Create a formal one- and three-year profit-and-loss statement template that each school will use to track revenues and expenses (led by the diocese).
2. Establish a formal mechanism to track enrollment and retention by grade for each school and conversion across schools.
3. Conduct annual research to support our ongoing marketing, enrollment, and retention efforts.
4. Reassess each school's strategic plan annually based on this new research and ongoing reporting.

OV-24. Assess school performance and communicate metrics and findings to engage stakeholders.

Strategies:

1. Provide Advisory School Board training at each school at least every two years.

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

2. Ensure transparency in sharing our efforts, successes, and challenges with all key stakeholders, particularly parents.
3. Each school will develop a comprehensive annual report and hold semiannual stakeholder meetings to review results, needs, and opportunities, with input and representation from the diocese.
4. At all parishes, schedule at least two Masses per year promoting Catholic school education, sharing our successes, and reinforcing our financial performance and needs.

ACADEMIC EXCELLENCE

The Academic Excellence (AE) Core Team aimed to develop a plan to assist the Catholic schools of the Diocese of Charleston in ensuring a curriculum and instructional practices that are challenging, rigorous, and rooted in the Catholic faith; inclusive of a diverse range of abilities so all students can reach their potential; and emphasize teaching students to “learn how to learn,” considering the rapid changes in job descriptions, skills, knowledge, and ways to access knowledge in the 21st century.

AE-1. Attract and retain highly qualified and certified/credentialed faculty and administration who embrace the mission of Catholic education.Strategies:

1. Continue to hire certified principals and teachers; require a commitment by noncertified teachers or principals to complete appropriate certification within three years of their appointment.
2. Examine the feasibility of ensuring competitive salaries and benefits packages for teachers and administrators across the diocese.
3. Establish a comprehensive one-year mentoring program for first-year teachers and teachers who need extra support. Include observations, feedback, coaching, and resources.
4. Increase opportunities for school and diocesan professional development, including ongoing skills and training needed to work with students with special needs (e.g., learning disabled, gifted and talented, speakers of English as a second language with emphasis on Hispanic community needs).
5. When possible, provide teacher planning periods.
6. Ensure an evaluation process is in place to measure the effectiveness of teachers (by the principal) and principals (by the pastor and superintendent).
7. Conduct exit interviews and surveys of teachers who leave the diocese to obtain feedback on ways to improve the school, retain teachers, and reduce turnover.
8. Recruit prospective teachers nationwide from colleges and universities that offer education programs.
9. The schools and diocese should recruit applicants to ensure diversity in hiring (i.e., gender, race, ethnicity).
10. Increase the number of clergy and religious on faculties and in administration. Continue to invite religious congregations to come to the diocese to serve in Catholic schools.

AE-2. Ensure a rigorous and relevant curriculum and effective teaching strategies for students to “learn how to learn” while developing/acquiring relevant 21st century knowledge and skills.Strategies:

1. Hire an additional diocesan administrator (e.g., associate superintendent) to coordinate and supervise the many aspects of curriculum and instruction, special education, and student support. Identify subject areas and grade levels with low performance on the Iowa Assessments (e.g., math at grades three and six). Develop a plan that includes faculty training sessions to address these areas of concern.
2. Implement the Alliance for Catholic Education (ACE) Collaborative for Academic Excellence Program at all schools, with particular focus on the following: (a) principals review teachers' plans and instructional materials and monitor that the ACE curriculum is used for each subject as they are reworked through ACE, (b) teacher and instructional evaluation is based on use of new curriculum development, and (c) implementation is monitored in each classroom, especially the differentiation of instruction for student mastery of skills and concepts. Oversight of the completion and implementation of the ACE curriculum should remain with the Catholic Schools Office and be included as part of the principal's evaluation.

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

3. Expand the scope of faculty, staff, and principal professional development at the local, regional, and diocesan levels to offer the following:
 - a. Multiple offerings for teachers to match areas of needed improvement and/or interest
 - b. Networking for teachers by grade and/or subject area and principals by deaneries and/or school size
 - c. A variety of delivery systems (e.g., workshops, webinars, online courses)
 - d. Topics aligned specifically to “learning how to learn”
 - i. Process- versus product-oriented learning (i.e., higher-order thinking skills)
 - ii. Alternatives to single-age grade classes, such as multiage classes and looping (teacher works with class over multiple years)
 - iii. Continuous progress and self-paced learning programs (e.g., Montessori, distance learning)
 - iv. Advanced theories and methodology of instructional leadership
 - v. Brain-based research on how children learn best, especially from ages 0 to 6.
4. Maximize federal and state funding to support professional development at all appropriate levels.
5. Encourage teachers to participate in public school district trainings. Principals should communicate with the local public school district office to ensure inclusion of Catholic school teachers and access to timely information on training opportunities.
6. Ensure that all schools provide options for visual, musical, and/or performing arts (e.g., classes, clubs, private lessons).
7. Explore offering niche or magnet programs to attract students and families (e.g., science, technology, engineering, and math (STEM); Montessori; arts; language immersion).

AE-3. Continuously update technology and ensure its effective integration in the classroom to enhance student learning.

Strategies:

1. Assist each school in developing a comprehensive technology plan that meets its local needs on hardware upgrades, software, and teacher training.
2. Help schools that cannot afford baseline technology to upgrade through grants, donations, and other sources of financial support.
3. Negotiate group contracts and purchasing rates to make technology more affordable.
4. Integrate ways to use technology effectively in the classroom in local, regional, and diocesan professional development trainings.

AE-4. Address and accommodate the diverse needs and capabilities of students with learning differences (including special needs, English as a second language, and gifted and talented).

Strategies:

1. Train teachers, principals, and pastors on the basics of educating special needs learners, appropriate and effective curriculum and instructional modifications, and the wide range of accommodations (simple to complex) to meet students’ learning needs.
2. Ensure accountability for timely creation of Student Assistance Plans (based on the Individualized Education Program), parental input, distribution and understanding of the plan by all teachers of the student, and periodic monitoring of effectiveness of accommodations with modifications made as needed.
3. Consider adding positions, sharing positions with other Catholic schools, or partnering with community agencies to provide student support services to meet the exceptional needs of students. Aim to have a certified special education teacher on the faculty at each school or at least a lead special education professional (i.e., consultant) at the regional level; cluster schools should share services where possible.

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

4. Explore alternative instructional methods that include learning that is hands-on, self-paced, integrated, and project-based, with possible corresponding components of multiage classes or multiyear teaching (looping) to meet the needs of students who are gifted (freedom to move ahead) or those who need instruction more closely aligned with their learning style or extra time for mastery.
5. Explore expansion of quality preschool programs to include 3- and 4-year-old kindergarten, with curriculum and instruction that aligns with and flows seamlessly into elementary grades. This is especially important for children who speak a language other than English at home.
6. Explore the feasibility of dual-language or English as a second language (ESL) programs to meet the needs of and attract diverse family cultures.
7. Evaluate the special education programs in the diocese to ensure the programs are accomplishing their goals and objectives to accommodate students' needs as fully as possible.
8. Ensure that each school has a process to monitor students who fall behind or need acceleration, and ensure that a promotion policy is in place and followed.

AE-5. Establish procedures for defining and measuring academic excellence and assist all schools to address areas needing improvement.

Strategies:

1. Define and measure academic excellence and assist all schools to address areas needing improvement.
2. Follow up with a strategic improvement plan with a timeline and benchmarks for expected improvement.
3. Encourage collaboration and communication within regions by establishing a regional leader or pair higher-performing schools with schools needing improvement.
4. Provide teachers with targeted professional development opportunities to become knowledgeable in teaching students from impoverished backgrounds as a strategy to close the achievement gap.

AE-6. Monitor and evaluate curriculum and student progress using test scores and other outcome data.

Strategies:

1. Examine Iowa Assessment data and trends from past years to determine improvement plans and goals. Set goals that are tailored to each school's performance level. Aim to move more schools to perform in the above-average range and the higher end of the average range.
2. Conduct a formal review of the use of standardized testing, including examining assessments used, time of year test is administered, reporting to teachers and parents, and methods of using student data to inform instruction.
3. Use ACE formative assessment tools throughout the school year to monitor and gauge student progress. Professional learning communities should analyze data and determine vertical alignment of curriculum. Establish teams of personnel who can interpret test results in light of curriculum and instruction. Maintain accountability for the ACE process as each curricular area is introduced and refined.
4. Implement ACE formative, summative, and performance assessment tools in every school with the necessary training.
5. Consider using a placement test upon admission in every school.
6. Explore using forms of grading other than letter grades in early grades (grades two and below).

AE-7. Address the physical, social, and emotional needs of students.

Strategies:

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

1. Collaborate with municipalities, hospitals, and other health service agencies to provide school nurses, annual vision and hearing screenings, and a health curriculum. A collaborative program including a number of Catholic schools could be arranged to share professionals and services. Examine examples of effective programs in other dioceses.
2. Aim to provide counseling services by hiring a part-time professional, cost-sharing professionals across schools, or establishing strategic partnerships with local social service agencies.
3. Explore ways to establish school-based social workers in partnership with Catholic Charities or local service providers, where feasible.
4. Where needed, establish an ESL program for students and, if possible, for parents (evening or weekend program).

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

GOVERNANCE AND LEADERSHIP

The Governance and Leadership (GL) Core Team aimed to develop a plan to enable the Diocese of Charleston to hire, develop, and retain dynamic, enthusiastic, and qualified leadership in pastoral and administrator roles; create administrative oversight and accountability to produce consistent results diocesan-wide; and strengthen diocesan leadership and the Catholic Schools Office to provide appropriate, necessary, and supportive services to help all schools thrive.

In creating the goals and strategies, the Governance and Leadership Core Team focused on the common mission to strive for excellence in Catholic education across all schools. The team was driven by a vision in which Catholic school education will continue to thrive well into the future.

GL-1. Strengthen diocesan Catholic school leadership to ensure excellence across all schools.

Strategies:

1. Increase the staffing of the Catholic Schools Office (including consultants) to provide sufficient support to the Catholic schools in the following areas:
 - a. Curriculum and instruction: to work with the schools to ensure excellence in curriculum, instruction, student assessment, student support, and special education (see MCI-1 and all priorities in AE section).
 - b. School operations and marketing: to oversee the evaluation and improvement of schools' operational performance, financial sustainability, marketing, and enrollment management (see all priorities in OV section).
 - c. Technology: to oversee school informational technology (e.g., student demographics, grades, standardized test scores, financial reporting) and the acquisition and implementation of instructional technologies (see OV-7, -10, -16; AE-3, -6).
2. Change the title of the diocesan director of Catholic education to superintendent of schools. The superintendent will oversee the implementation of the Strategic Growth Plan.
3. Expand the superintendent's annual school review to assess accreditation goals, implementation of the Strategic Growth Plan, and school leadership effectiveness.
4. Create a Diocesan Schools Advisory Board tasked with furthering excellence in the four planning areas. The board should serve in an advisory capacity to the bishop and superintendent and have oversight of the implementation of the Strategic Growth Plan. Membership should include, but not be limited to, principals and representatives from a variety of schools in terms of location, size, and type. Appoint members with a range of relevant expertise and diverse backgrounds.

GL-2. Provide a policy structure to create consistency of quality Catholic education across the schools and forward-thinking school management on decisions impacting personnel, parents, and students.

Strategies:

1. Standardize the maintenance and reporting of school records for enrollment, retention, attendance, grades, test scores, alumni information, donation information, and finances through the use of a school management database. Provide the necessary training for school personnel on the use of the database.
2. Develop a diocesan-wide school administration policy manual with the goal to create consistency across the system while allowing for adaptability at the local level.
 - a. Create a consistent professional assessment and evaluation system for principals and teachers that builds on strengths and seeks to develop and support areas needing improvement.

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

- b. The superintendent of schools will determine the necessary qualifications for school administrative positions in the diocese. He or she will be consulted and will advise pastors as part of the interview process for principal candidates.
- c. The pastor and the superintendent will conduct mandatory exit interviews for departing principals.
- d. Attendance at leadership meetings will be compulsory.
3. Conduct a formal review of teacher and administrator benefits offered at schools. On an ongoing basis, research the best medical plan options (balancing costs and benefits). Ensure a competitive and consistent compensation plan that includes incremental salary increases. Examine the merits of basing salaries on a percentage of local public school district salaries or establishing a diocesan-wide scale.
4. Communicate policies with consistency and transparency. Provide training on the policy manual for pastors, school administrators, faculty, staff, and school board members to ensure that each school implements policies consistently.

GL-3. Build highly effective local school advisory boards that provide exceptional leadership.

Strategies:

1. Create a boardroom climate that fully enlists multiple skills, differences of opinions, and informed questions to engage the board in envisioning direction versus just discharging duties (e.g., reviewing policies) and proactively recommending strategies versus reacting to administrators' decisions.
2. Cultivate an atmosphere of trust and mutual respect, which is the foundation for the boardroom described in number 1. Administrators should model this for the board.
3. Foster teamwork by developing the board's discussion skills, strengthening committee structure, and conducting a regular board self-assessment.
4. Establish meeting formats that provide time for dialogue, encourage generative and creative thinking, and explore divergent thinking.
5. Assign Diocesan Schools Advisory Board members to assist with orientation to introduce to the local boards rules of engagement and their primary role and responsibilities, as well as to assist with refocusing board agendas to include robust discussions.
6. Throughout the diocese, establish a comprehensive and systematic approach to identify, recruit, nominate, and select members who will engage in and enhance the board's culture of inquiry (i.e., study the implications of decisions, raise thoughtful questions, assess progress over time).
7. Continue biannual training of local school boards by the superintendent that includes training on the development, implementation, and monitoring of the school's five-year strategic plan.

Source: Axelrod, Nancy. *Culture of Inquiry: Healthy Debate in the Boardroom*, Washington, DC: BoardSource, 2007.

GL-4. Ensure that leaders are equipped to effectively support, guide, and direct our Catholic schools.

Strategies:

1. Develop a leadership training program for new principals. New principals should meet quarterly with the Catholic Schools Office to learn about key elements of effective school leadership, including board development, managing budgets, and improving development and advancement programming. Identify and use mentoring principals who can provide seasoned and confidential advice for new principals.
2. Seek to appoint pastors who demonstrate effective pastoral support for and leadership of Catholic education to parishes with schools. Continue to take advantage of leadership formation opportunities for new pastors of parishes with Catholic schools (e.g., ACE School Pastors' Institute). Integrate an experience at parishes with schools into the formation program for seminarians and first-year priests.
3. Focus ongoing professional development by the diocese on presenting and sharing best-practice solutions to common challenges (e.g., enrollment management, teacher evaluation, special education services, inclusion of minority populations).

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

4. Facilitate frequent and substantive communication among principals to share effective practices and troubleshoot challenges.
5. Provide training for teachers, administrators, pastors, parish staff, and school board members on ways to be effective ambassadors for promoting the school.

GL-5. Identify leadership candidates, train prospective leaders, and place new leaders to ensure that all schools are effectively led.

1. Establish a diocesan leadership development program to attract, identify, and train potential leadership candidates to build a pool of qualified administrators who can assume leadership as openings arise.
2. Each year, the Catholic Schools Office will request the names of teachers and staff who are interested in school administration and who show leadership potential.
3. Team aspiring leaders with an experienced principal to serve as a mentor during the training period.
4. The Catholic Schools Office should negotiate with Catholic colleges and universities (e.g., Notre Dame, Boston College, Dayton University) to arrange for an affordable Catholic school administrator certification. Consider cost-sharing among the diocese, school, and program candidates.
5. Implement an education reimbursement program to encourage people to obtain school leadership advanced education or administrative degrees. The diocese will reimburse a portion of advanced education expenses in exchange for a set time serving in an administrative role in a diocesan school following completion of the program or degree.
6. Succession planning should be a collaboration between the Catholic Schools Office and schools to ensure seamless leadership changes. Establish a pool for principal replacement, retirement, and relocation, as well as a diocesan process for new principal searches.

GL-6. Continue to develop a creative learning community among the Catholic Schools Office, principals, and teachers to ensure excellence, provide collegial support, and test best practices.

Strategies:

1. Continue to recognize the accomplishments and milestones of all school employees in their service to Catholic education.
2. Provide guidance and a recommended process for each administrator and school board to develop a school-specific strategic plan based on the diocesan Strategic Growth Plan.
3. Promulgate excellent programs that show positive results through teacher professional development and facilitate follow-up discussions to assist with replication and implementation. These can take place through diocesan teacher professional development days, regional trainings, or webinars. These should be focused on a particular subject area and/or level to ensure meaningful peer sharing.
4. Facilitate ongoing conversations among schools with similar challenges to consider best-practice approaches and/or develop unique solutions to their challenges.
5. Facilitate ways to pool human and material resources to leverage our strengths as a system (e.g., stream online classes between schools, online courses for accelerated students, special education services).
6. Continue to ensure that Catholic schools are welcoming and accessible to families from a variety of backgrounds. Create a plan to make our schools more effective at drawing and retaining a diverse set of families, including the following:
 - a. Identify administrators and staff members who speak more than one language, particularly Spanish, and make it a goal for all schools to have at least one Spanish-speaking person on staff.
 - b. Create programs for administrators, teachers, parents, and students to promote understanding and acceptance of people from different backgrounds and cultures.

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

V. IMPLEMENTING, MONITORING, AND EVALUATING THE PLAN

The implementation, monitoring, and evaluation of the Strategic Growth Plan will offer opportunities to disseminate the goals and strategies to appropriate groups throughout the diocese. Every person responsible for the implementation must accept the plan, agree to its direction, and implement, monitor, and evaluate specific actions. What follows are steps to accomplish that.

1. Disseminate and communicate the plan.

- Meet with principals and pastors to report on the progress of the planning process so far and share the proposed implementation process and structure by October 15, 2015.
- Create an attractive, full-color comprehensive plan and executive summary brochure that details the plan basics in print and electronic form to distribute to key stakeholders by November 2015.
- Disseminate a summary of goals and strategies to the principals, pastors, and school advisory boards by December 2015.
- Post on the diocesan website by December 2015.
- Invite *The Catholic Miscellany* to highlight the unfolding of the plan in the Catholic Schools Week issue in December/January 2015.
- Schedule a news conference during Catholic Schools Week at which Bishop Guglielmone and Sandra Leatherwood highlight the plan and process and respond to questions.
- Report plan implementation progress in Catholic Schools Office newsletters and *The Catholic Miscellany* throughout the span of the plan.
- Use all accessible media and face-to-face forums to chronicle progress and achievement from 2014 to 2020.
- Present short highlights of yearly implementation plans to stakeholders via the media and meetings in May/June 2016, May/June 2017, May/June 2018, May/June 2019, and May/June 2020.
- Report plan implementation progress in the Catholic Schools Office annual report, at the yearly final principals meeting, and to the other diocesan departments involved in May/June 2016, May/June 2017, May/June 2018, May/June 2019, and May/June 2020.

2. Establish a Strategic Plan Implementation Task Force.

Purpose: Work with the superintendent to manage and oversee implementation, monitoring, and evaluation of the plan.

Accountability and role: Be accountable to the superintendent.

Membership: Include 10 to 15 members who are representative of the planning areas and were involved in the process as a Core Team member or congress participant; they will be nominated by the Steering Committee and invited by the superintendent.

Facilitators: Erik Goldschmidt, Ph.D., and Regina Haney, Ed.D.

Term: one year

Subcommittees: Align to the planning areas; a chair and co-chair will be appointed to lead each committee.

Meetings: Scheduled monthly meetings

Record keeping: Minutes and progress reports will be distributed to stakeholders through the superintendent.

Implementation check points

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

30 days

- Set timeline for a five-year general sketch of the implementation plan; identify subcommittee members. The following are suggested subcommittees:
 - Mission and Catholic Identity
 - Academic Excellence
 - Governance and Leadership/Nominating/Governance
 - Operational Vitality: Marketing/Enrollment Management
 - Operational Vitality: Finance/Development/Facilities

60 days

- Subcommittees meet to create a more detailed plan on how to accomplish the five-year implementation schedule related to their area.

90 days

- Subcommittees begin to execute the plan.
- Subcommittees set goals.

180 days

- The Implementation Task Force has in process at least 33.3% of goals with related strategies for year one.

270 days

- The Implementation Task Force has completed at least 75% of goals with related strategies for year one.

360 days

- The Implementation Task Force has completed 100% of goals with related strategies for year one.
- An annual report is published and is disseminated to stakeholders that highlights the successes of the planning implementation.

3. Establish the roles of the newly formed Diocesan Schools Advisory Board and its Strategic Planning Committee by the end of 2016.

The Strategic Plan Implementation Task Force passes the baton to the Diocesan Schools Advisory Board.

A. The Diocesan Schools Advisory Board, along with the Strategic Planning Committee of the board, is responsible for implementing, monitoring, and evaluating the strategic plan. The Strategic Planning Committee will be the lead agent and will be responsible for overseeing plan implementation.

- The board will incorporate aspects of the strategic plan into its yearly plans and the annual goals of its standing committees.
- Annually, with the superintendent, the board will evaluate the overall adherence to the plan and make appropriate revisions.
- On a regular basis, the board in collaboration with the superintendent, will communicate with stakeholders about progress on plan implementation.
- The board, in collaboration with the superintendent, will incorporate the financial aspects of the plan into the Catholic Schools Office's annual budget.
- The board will include the plan's strategies in its plan for the year.
- Annually, with the superintendent, the board will evaluate the Catholic Schools Office's and board's adherence to the plan and make suitable revisions. The operational plans developed by the appropriate committees should be used because they contain benchmarks or success factors. This can take place at the annual board retreat.

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

B. The Strategic Planning Committee of the board will have the following responsibilities:

- Regularly review goals and strategies.
- Present progress reports at board meetings.
- Through the superintendent, present reports to the pastors, principals, administrators, and appropriate diocesan departments.
- Keep the vision before the board and stakeholders.
- With the Catholic Schools Office, prepare an annual report showcasing progress toward implementation of the plan.
- With input from other committees and stakeholders, periodically adjust or revise the strategies, if needed. Adjustments and revisions will be presented to the board for approval.
- Continually conduct environmental scans to ascertain new trends and update demographic data.
- Determine and propose to the board new demands that would alter the plan.
- In collaboration with the superintendent, annually publish the revised plan that is approved by the board.

C. Configure the standing committees of the board to create a committee-driven board with the responsibility to oversee the implementation of, monitor, and evaluate the strategic plan. To do this, the following committees are suggested:

- Strategic Planning
- Mission and Catholic Identity
- Academic Excellence
- Governance and Leadership/Nominating/Governance
- Operational Vitality: Marketing/Enrollment Management
- Operational Vitality: Finance/Development/Facilities

Each committee will have a job description and goals, which will be taken from the plan and depend on the year of implementation. Committees will be required to present a written report before each board meeting. As a result, work will be done in committee and not at the board meeting. The result of the configuration should be a more focused and productive board.

- **Meetings:** Regularly scheduled meetings
- **Record keeping:** Minutes and progress reports from the Strategic Planning Committee and each standing committee will be presented at board meetings and made available to all stakeholders via the Catholic Schools Office website.

4. Require key staff of the Catholic Schools Office to integrate goals of the plan into their daily work.

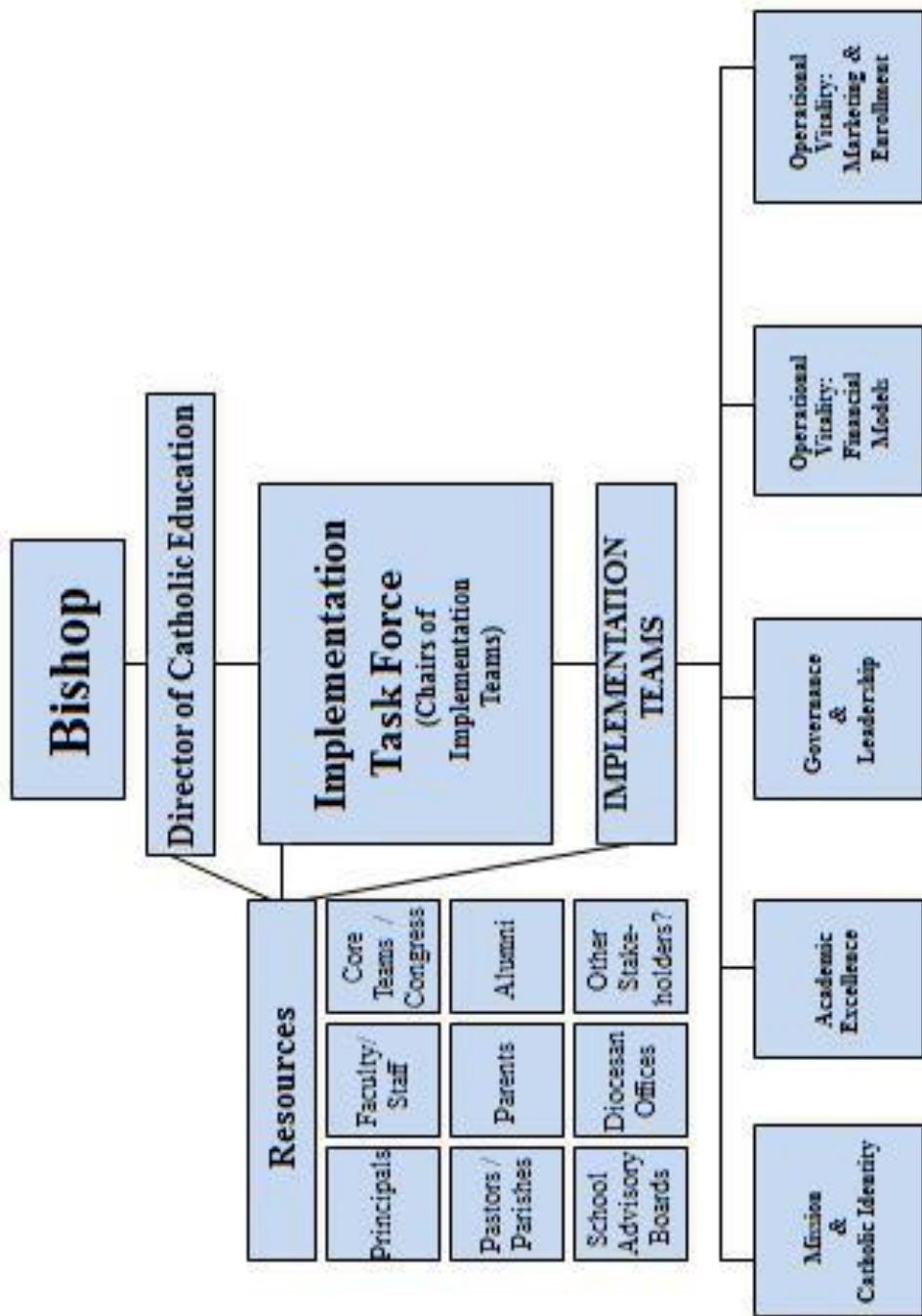
- At a planning session to begin the school year, the staff will discuss and strategize the integration of the plan into their staff work and goals for the year.
- Progress will be assessed during annual performance appraisals.

5. Catholic Schools Office staff will collaborate with other diocesan offices involved with implementation of the plan.

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

IMPLEMENTATION ORGANIZATIONAL CHART

A temporary structure will be used to oversee the implementation, monitoring, and evaluation of the Strategic Growth Plan.



DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

APPENDIX A. ASSESSMENT METHODS AND INFORMATION SOURCES

The Task Force conducted a comprehensive assessment of the Catholic schools in the Diocese of Charleston, using data already available to the diocese as well as data gathered by new surveys and other sources. The assessment methods were determined by two goals: (1) provide the best information available to the Task Force so it was effective in its planning, and (2) engage key stakeholders in the planning process to include their perspective and make them aware of key information on the process.

1. Input from principals and pastors:

Thirty-one principals, one president, 19 pastors, and three diocesan officials attended a daylong planning session to identify Strengths, Weaknesses, Opportunities, and Threats (SWOT) and key challenges for each planning area.

2. Public listening and input sessions:

Principals and pastors were asked to distribute the information and invitations to their constituencies.

- Locations included Columbia, Greenville, Myrtle Beach, Charleston, Mount Pleasant, and Ridgeland.
- Fifteen sessions were held at six locations for 90 minutes each.
- Sessions were attended by 115 people.
- Participants were invited to discuss the SWOT analysis of the schools and identify key challenges.

3. Online public survey:

An online survey asked people to identify how likely they were to recommend the Catholic schools, their reasons for promoting them, and their recommendations on what would strengthen the schools. The following groups received the invitation to disseminate the survey by email:

- Principals—asked to send to teachers, parents of current students, and alumni
- Pastors—asked to send to parishioners via email or parish bulletin
- Directors of religious education—asked to send to catechists and parents of their parish religious education program
- Diocesan department director—asked to send to donors, major stakeholders, and other stakeholders
- *The Catholic Miscellany*—asked to print an invitation letter

Survey sample size: 656

- Catholic school parent: 63%
- Non-Catholic school parent: 16%
- Catholic school teacher, staff, or principal: 19%
- Graduate of a Diocese of Charleston Catholic school: 11%
- Priest or deacon: 2%
- Other/unknown: 15%

Note: These are overlapping categories.

3. Southern Association of Colleges and Schools Accreditation Report and Recommendations

4. Marketing materials and welcome packets from schools

5. Diocesan and school data:

- Registered Catholics (by deanery)
- Catholic Schools Office roles and responsibilities
- Diocesan administrative and employee handbook
- Catechist requirements
- Role descriptions for principals and teachers
- Teacher and principal contract forms
- Diocesan professional development plan and previous programming
- Teacher licensure renewal, continuing education process, and policies

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

- Teacher and administrator benefits plan
- Teacher and principal observation tools
- Student and teacher demographics (race, percent Catholic, etc.)
- Tuition rates
- Teacher salary ranges
- School governance models
- School budget totals
- Cost per pupil (elementary and high school)
- Student enrollment figures (past 10 years)
- Financial aid distributions
- Sources of revenue
- Achievement scores (Iowa Assessments for past three years)
- Graduation and retention rates
- Curriculum guidelines
- Parish baptism and first Communion figures (past 10 years)
- Parish religious education enrollment figures (most recent)
- Financial statements for the diocese
- Diocesan financial requirements for the schools

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

APPENDIX B. PLANNING PROCESS TIMELINE

March–August 2014: “Planning to Plan” sessions held with Sandra Leatherwood, Director of Catholic Education, Office of Education

September 30, 2014:

Facilitators met with Bishop Guglielmone to present the process and ascertain his expectations of the process.
Steering Committee met for a planning process orientation.

October 16, 2014: Facilitators met with principals and pastors for a planning session.

November, 2014:

Public listening and input sessions were held at six locations with three time periods offered at each location.
Fifteen 90-minute sessions were attended by 115 people.

December 9, 2014:

Steering Committee met to plan for Core Team work.
Ultimate Question Survey was administered online and completed by 656 people.

January–March 2015:

The 44 members of the four Core Teams met on three occasions and conducted in-between conference calls.

April 23, 2015: Steering Committee met to create the first draft of the Strategic Growth Plan.

May 4, 2015: Facilitators met with Bishop Guglielmone to present the first draft of the Strategic Growth Plan.

June 16, 2015: Steering Committee met to plan the congress.

June 24, 2015: Diocesan-wide congress was held in Columbia with over 100 participants.

July 24, 2015: Steering Committee met to revise the Strategic Growth Plan and review the draft of the implementation process.

August 14, 2015: Steering Committee continued to revise the Strategic Growth Plan and implementation process.

September 21, 2015: Facilitators met with Bishop Guglielmone to present the second draft of the plan.

October 15, 2015: Facilitators met with principals and pastors to present the plan and review the implementation process.

November 23, 2015: Steering Committee presented to Bishop Guglielmone a final draft of Strategic Growth Plan and implementation process.

APPENDIX C. CANON LAW AND THE CATHOLIC SCHOOL

Rev. Phillip J. Brown, P.S.S., J.D., J.C.D. is the Rector/President of the Theological College of The Catholic University of America. He is also the Econome Genereral (General Treasurer) of the Societe de Saint Sulpice and the Vice President and President elect of the Canon Law Society of American. He is a priest of the Diocese of Bismarck, North Dakota and taught Canon Law at The Catholic University of America (2006-2010).

The immediate supervision and oversight of Catholic schools is the responsibility of the competent authority and administrators at the local level. Thus, the pastor of a parish is the immediate competent ecclesiastical authority for a parish school, and the administrators of these schools normally answer directly to the pastor.

Catholic high schools, unless they are specifically diocesan schools, are normally administered by a board of trustees. Local and regional high schools usually include as members of the board of trustees the pastors of all the parishes involved in the school. Diocesan high schools may also have a board of trustees or some other form of governance established by the local ordinary, and the makeup of the board will depend on the kind of structure thus established and the manner of choosing members of the board set forth in the governance documents.

Nevertheless, for both parish schools and Catholic high schools, the diocesan bishop, who is the local ordinary, also has an important role that today is usually exercised through a diocesan superintendent of schools or Department of Education. The instruction and education in a Catholic school must be grounded in the principles of Catholic doctrine, and teachers are to be outstanding in correct doctrine and integrity of life (canon 803 §2, 1983 Code of Canon Law).

While it is the responsibility of local authorities to assure this, it is uniquely the role of the diocesan bishop to do so, which is usually carried out through the diocesan superintendent or other diocesan officials concerned with Catholic schools. Thus, no school can use the name Catholic school without the consent of competent ecclesiastical authority, which for the whole diocese is the diocesan bishop. If local authorities were to fail to comply with the diocesan bishop's policies or to cooperate with his oversight of all the schools in the diocese, he could deny them the right to identify the school as a Catholic school.

This authority of the diocesan bishop over all matters concerning Catholic schools in the diocese is further underscored by canon 806. Section 1 of canon 806 recognizes the right of the diocesan bishop to watch over and visit the Catholic schools in his territory. The "right of visitation" is an ancient canonical institute founded on the bishop's authority over Catholic institutions in his diocese. It involves far more than simply visiting the institution. A canonical visitation is more akin to what today would be called an "audit" or an accreditation process, although a canonical visitation is a separate and distinct ecclesial process from civil accrediting processes. A canonical visitation is based on the visiting authority's right to examine all aspects of the institution and require various forms of reporting and even changes in the way the institution is administered if the visiting authority determines that such changes are necessary, warranted, or advisable. Thus, a canonical visitation could be viewed as roughly equivalent in the ecclesial realm to an accreditation process in the civil realm.

Canon 806 §1 goes on to say that the bishop also issues prescripts that pertain to the general regulation of Catholic schools in the diocese, thus further recognizing his right and responsibility to establish policies for the running of schools in the diocese and that also provide for the accountability of the schools to him. Finally, §2 of canon 806 provides that directors of Catholic schools are to take care, under the watchfulness of the local ordinary, that the instruction given in their schools is at least as academically distinguished as that in the other schools of the area. Thus, the canon law recognizes a wide authority of the diocesan bishop to oversee, establish policies for, and intervene in the administration of all Catholic schools in the diocese to the extent he deems necessary and appropriate. Once again, this authority is usually exercised today through a diocesan superintendent of schools, Department of Education, or similar officials and departments of the diocesan administration.

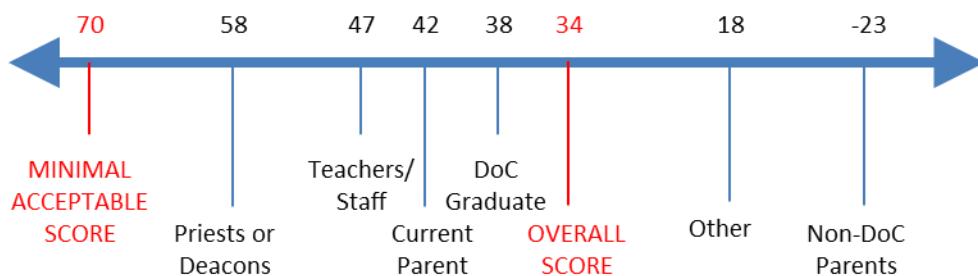
DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

APPENDIX D. MARKET ANALYSIS OF SURVEY DATA

One of the foundational assumptions of the recommended marketing plan is there is proof that *the cost to secure a new student is higher than the cost of retaining a current student*. Currently, across schools, most marketing activities focus largely on new enrollment.

The Catholic Schools Task Force identified that our schools are not in as favorable a position in the hearts and minds of our families as the diocese would prefer. Addressing this issue and creating Catholic school champions must be our first priority. In December 2014, the Task Force conducted a Net Promoter Score (NPS) study, a common research technique to assess the depth of loyalty and relationship a brand has with its customers (in our case, our schools' relationship with key stakeholders such as current families and alumni).

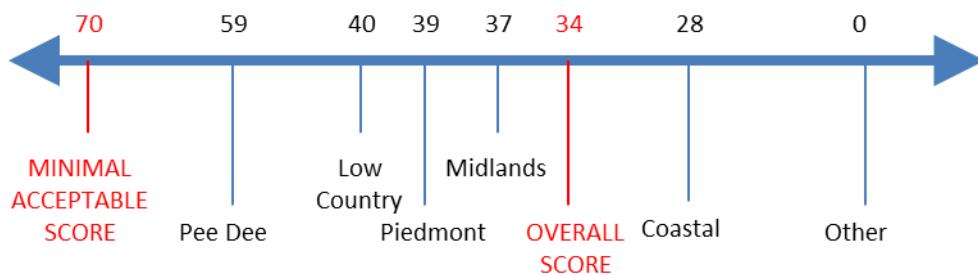
An acceptable NPS score is at least 70. In the Task Force research, we learned than no constituent group rated our schools at this minimum level:



Several implications of this research must be considered in developing a new marketing plan for our schools:

- Our current parents (more than four in 10) are not advocates for us, so they must be our first priority in building strong ambassadors for our schools.
- Our teachers and staff, who are critical to our success, are also not strong advocates for our schools. In fact, four in 10 are neutral to detracting, indicating not only a likely risk of resignation, but a lack of motivation in the classroom.
- Another concern is the relatively low NPS scores of our alumni. They are not only important advocates for Catholic education and our schools, but also an important source of donation revenue and other support.
- The last group is parents of children not attending Catholic schools. This group actually had a negative NPS score, likely driven by perceptions of cost, academic quality, and/or religious preference. To increase enrollment, we need to reach new families. However, we must focus on targeted families with potential to be recruited, because the cost of recruiting some families will be cost and time prohibitive.

The NPS research also indicated a large difference in NPS scores among deaneries in the diocese:



DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

There are implications for all regions in this analysis. The Pee Dee region, somewhat surprisingly, was rated the highest of any deanery, so it is helpful to understand what drives this relatively strong score. An assessment of responses for the Pee Dee region indicates that the school's leadership, environment, connection to families, and commitment to integrating Catholic values are creating stronger ambassadors for Catholic education. Comments from two parents summarize and largely reflect the overall responses:

"Small classes, great loving teachers, wholesome family atmosphere, concern for the whole person (spiritual, emotional, and academic needs)"

"Well I would recommend this (Pee Dee School) because to me it is great to see that the kids have one-on-one learning experience. I like that they are smaller schools and for that reason they are able to have more one-on-one time with the teachers. I also like that they have the ability to learn both about God while also learning their colors, math, etc. I also very much like the staff; they are very nice and very attentive to the needs of their students. It is overall a great school and for that reason I would recommend it to others around my area."

Creating Our Value Proposition—Five Pillars

Catholic schools in South Carolina have a value proposition based on a combination of five strategic pillars that make us unique. The NPS research provided the foundation for these pillars, which we can use to develop a consistent approach to communicating our points of difference to our key stakeholders. Some schools may choose to prioritize certain pillars over others, but in the emphasis in our communications (both verbal and nonverbal) should be on leveraging all these points because *our value proposition is defined by the combination of all five and not any one pillar*. Below, in their own words, are our stakeholders' expectations:

Holistic—defined as our academic commitment to uniquely developing the whole child academically, physically, emotionally, socially, and morally.

"I would like to see the school be more proactive and innovative (academically) rather than reactive and stagnant."

"Make the curriculum harder. Other than adding religion I feel the curriculum is equal to that of public schools. I want my children to be better prepared for college."

Excellence—defined as a commitment to providing the strongest academic experience in South Carolina.

"In the key planning areas mentioned, I think Academic Excellence is the element that needs the most attention. I think the science, technical, and mathematical programs in Catholic schools need to compete with the better programs being offered at public schools. Some significant improvement is needed in these areas."

"I tell my friends that we go to ABC for the values and the wonderful community in which our children can grow and learn, but if we were solely focusing on top-notch academic excellence, we would be elsewhere."

"I have heard from various other young adults with children that the Catholic schools are not academically competitive with the public school systems of South Carolina. I have also heard various concerns from some of the teachers working at the local Catholic high school related to the school's Catholic identity."

Invest—defined as our respect for the fact you (a parent) have chosen to invest in Catholic education, you're paying twice (taxes and tuition), so you expect more and we must deliver MORE.

"Simply stated—affordability. I have two boys currently in Catholic school, and it is extremely difficult to make ends meet. I believe so strongly in Catholic education that my husband and I work three jobs. However, it is exhausting, and I often ask myself if it is really worth it. Other people tell me they would love to send their children to Catholic school but cannot afford it. My reply is, I completely understand."

"The cost of tuition rises every year without many improvements. Between after school care and tuition I give the school almost \$750/month. My child does not have special needs and we are not a low-income family, so we do not qualify for assistance. Regardless of

DIOCESE OF CHARLESTON STRATEGIC GROWTH PLAN

how much I like my child attending a Catholic school that teaches morals as well as academics, it might be unaffordable for us next year.”

Belief—defined as a commitment from the bishop, our priests, our school leaders and our teachers that we will build lifelong believers in God, themselves, and their future.

“I don’t feel like the children are excited about their faith when they come out of the elementary school here. Not sure why, maybe a) the leadership is not excited, b) the religion teacher is not genuine about her faith, and c) the pastor turns people off. I think this is a huge problem. If people are going to pay to send their kids to a Catholic school, it needs to be more than just a private school but a school of vibrant faith formation.”

“Although religion is taught, I have not necessarily experienced warm, caring spirituality among the students, teachers, and parents. We have been a part of another Christian school where the love of Christ and a sense of a vested interest in seeing my child succeed went well beyond academics.”

“I would like to see more connection between parish priests and the school, if asked for areas of improvement.”

“Principals and teachers who are hired should have a firm understanding of the Catholic faith and should be practicing their faith and be good role models for students and parents. Unfortunately, this is not always the case and that’s VERY DISAPPOINTING.”

“...I wish there was more religious vocation exposure through visits from priests and religious tapping into the rich variety of vocations in the XXX area.”

Love—defined as all families are welcome and your children will be safe and nurtured.

“The Catholic school in my area is small and therefore unable to provide the academic choices necessary to compete with what is available in our public schools. I kept my children there because I felt that the environment was more important and because I was confident that my children could catch up in high school without much trouble. However, the longer my family was at our Catholic school, the more I became disillusioned about the environment. I noticed a problem with bullying behavior that was not countered by a consistent disciplinary policy. I encountered religious instruction that was in error, and I have noticed the decline in Mass attendance by youth who have graduated. Where is the love of faith they should be cultivating in our school?”