

Saint Philomena School

Stepping into the 21st Century

Strategic Plan for January 2003 – December 2005

**Adopted by the Board of Trustees
October 6, 2003**

Overview of the Planning Process

Early in 1999, Saint Philomena School launched a strategic planning process to determine its direction and focus for the 21st century. This ongoing process has involved students and parents, faculty and staff, Sisters FCJ, and educators in the surrounding community. The School has engaged these constituencies through focus groups, written surveys, community meetings, and personal interviews.

The planning process produced a comprehensive vision that has inspired the School to move forward into the 21st century. At Saint Philomena School, we seek to remain rooted in our founding philosophy, mission, and the FCJ charism as we move towards our vision of the future.

The first Strategic Plan articulated goals and strategies to achieve the School's vision for the period January 2000 through December 2003. In the spring of 2003, the School's Board of Trustees, together with representatives of the School's diverse constituencies, again gathered to articulate key directions for the Plan's extension, covering the period January 2003 – December 2005.

The Value of the Plan and Planning Process

Saint Philomena School uses its Strategic Plan – and the ongoing process of evaluation and dialogue – to assess its fidelity to its mission and philosophy, to strengthen operations, to enhance community relations, to increase philanthropic investment, and to assure overall quality and integrity.

The Strategic Plan for the period January 2000 – December 2003 provided a touchstone for administrative and governance activities. Guided by this plan, we have made significant progress towards our goals, moving steadily forward in our vision for the future, rooted in our philosophy and mission.

The process of extending the Strategic Plan from 2003 began with an articulation of the role of the Plan in the life of the School. The following points were highlighted:

- *The Strategic Plan provides the School community with a comprehensive view of what is important. It puts the children first.*
- *The ongoing planning process and written plan enhance the School's credibility with its diverse constituencies, justifying constituent investment, whether as enrollees, volunteers or donors. The Strategic Plan serves as a "case for support" for fund development.*
- *The planning process manifests the School's willingness to explore, question, grow, and change.*
- *The Plan provides focus and accountability, communicating what people will receive by participation in the Saint Philomena Community. This helps the School manage expectations and enables the School's constituents to hold the School accountable.*

- *The planning process engages constituents, produces cohesion and alignment, and encourages collaboration, bringing people together to work towards a shared vision.*

The Vision

The School's vision remains clear and compelling. The vision, as articulated in 2000 and included below, reflects our shared dream for the future. The School community created this vision together, and the School's leadership confirmed this vision as the basis for the extension of the Strategic Plan through December 2005. As a community, Saint Philomena School recognizes that it will take years to achieve our goals. The Strategic Plan, updated and extended every few years, outlines how we can best achieve our vision.

Assumptions for the period 2003 – 2005

The world has already changed significantly since the planning process in 2000. The School recognizes that the world is ever changing and that these changes set the context in which we move toward our vision.

To better anticipate this context and adequately prepare an extension of its Strategic Plan, the planning process elicited some critical assumptions for the next 3-5 years:

External Issues

- **Demographic:** *Population growth will remain flat to modest, probably less than 1% per year. There will likely be a slight decrease in the regional population of those less than 12 years of age*
- **Economic:** *While any economic forecast remains tentative, the School assumes a stable local economy with weak short-term growth. While significant risks will persist (such as changes in local employment, the state's fiscal picture, etc.), the School's economic environment will remain largely unchanged.*
- **Social:** *Constituent participation will continue to be active, though parents remain highly committed, busy, and stressed, facing competing demands for time and money.*
- **Educational:** *While educational choices, both public and private, will continue to be available and perhaps increase, Saint Philomena School will provide an attractive alternative. There is marketplace desire for education rooted in Christian values – where faith and knowledge meet.*
- **Security:** *There will continue to be serious and possibly increasing concerns about personal and community safety and security.*

Internal Issues

- **Philosophy and mission:** *The School remains rooted in its philosophy, mission and the FCJ charism.*
- **Curriculum:** *Constant evaluation of the School's curriculum will be necessary to prepare each student for the complex world of the 21st century.*
- **School enrollment:** *The School's current operation at full capacity with a modest waiting list will continue, though the waiting list will likely decrease. The Master Plan calls for a maximum enrollment of 450/451. Unless targeted action is taken, there will be the same level of diversity within the School.*
- **Tuition:** *The School's tuition will remain in the mid-range of its peers, with affordability a continued priority.*
- **Facilities:** *With the Master Plan to be completed by June 2004, an enhanced learning environment will remain a critical goal. Construction and renovation projects will move forward as scheduled, and all facilities will incorporate continued technological improvements, efficient and cost-effective maintenance, and appropriate security measures.*
- **Staff recruitment and compensation:** *Teachings positions will remain filled, with qualified replacements available when positions open up. The School anticipates a decreasing involvement of Sisters FCJ. The School will need more staff to handle the workload. Salary levels will continue to meet or exceed 75% of comparable public schools levels, with a commitment to maintain and enhance benefits as resources permit.*

Goals and key directions for the period January 2003 – December 2005

As always, we will ensure that our initiatives, activities, decisions, and actions remain faithful to the philosophy and mission of the School. Our vision reflects our shared dream for the future and all our work will move the School there.

In order to achieve our vision, we have grouped our work into eight key goals, the focus of our work for the period January 2003 – December 2005.

Goal #1: Enhance our curriculum and the curriculum process to educate our students so that they may excel in a diverse global community.

- **Key direction:** As we create our vision of the optimum curriculum where faith and knowledge meet, we will maintain the progress accomplished to date and focus on the following:
 - Further integrate technology into the curriculum.
 - Evaluate present course offerings, strategies and methodologies in order to enhance and develop new approaches.
 - *Accountability and timeframe: Educational leaders of Saint Philomena School. Ongoing.*

Goal #2: Assure quality personnel to maintain the integrity of the School.

- **Key direction:** The philosophy, mission and vision of Saint Philomena School require the recruitment and retention of high caliber faculty and staff, an adequate administrative infrastructure, and succession planning for administration. Each of these issues is fundamental to the integrity of the School, and requires intense focus during the period of 2003 – 2005. These three issues join together in one goal, to focus the attention and commitment of both Board and administration.
 - a) ***Enhance faculty and staff recruitment and retention.***
 - Continue to develop and implement a recruitment and retention program to secure excellent educators and highly skilled staff who are dedicated, enthusiastic, creative, respectful, and diverse, and who support the philosophy, mission, vision, and strategic plan of the School.
 - Maintain faculty and staff salary and benefits; as resources permit, enhance salary and benefits.
 - Assure that faculty salaries remain at 75% (at least) of comparable public school teachers.
 - Enhance individual professional development by providing these opportunities to faculty and staff.
 - Continue the implementation of a faculty and staff evaluation process that is clear, fair and thorough.
 - Continue to create a family environment that supports all who work at the School.
 - *Accountability and Timeframe: School administration and staff task force(s) as appropriate. Finance Committee and Board are engaged in the financial issues only. Ongoing.*
 - b) ***Assure management succession that maintains the integrity of the School.***
 - Devise a plan to ensure that future Principals will foster the FCJ charism that is integral to the philosophy of Saint Philomena School.
 - Ensure that there is an adequate pool of candidates by devising appropriate professional and spiritual development opportunities.
 - Ensure funding to support the succession process, the search process, and the compensation for the new Principal.
 - *Accountability and Timeframe: Special committee of the Board and FCJs. Focus for 2004.*
 - c) ***Assure adequate administrative infrastructure to support the School.***
 - Evaluate current infrastructure of the School and research infrastructures of comparable schools. Consider scope of responsibilities and workload.

- Articulate the optimum infrastructure for Saint Philomena School, including reporting structure, scope of authority, and job descriptions. Based on compensation research, devise salary ranges and qualifications.
- Devise funding and hiring plan for positions.
- *Accountability and Timeframe: Administrative function. Interfaces with Finance Committee of Board regarding financial implications. Focus for 2004; phase in implementation starting in 2005, depending upon available financial resources.*

Goal #3: Increase the School's endowment.

- **Key direction:** An endowment fund provides vital income to fund our vision and ensure short- and long-term stability for the School. During the past 3-year Strategic Plan, the School has enhanced its fund development operation, increasing annual giving, and begun raising gifts to support the construction program. This progress has, through practice, enhanced the School's understanding of and capacity to raise gifts. As we focus on building the endowment, we must consider the following:
 - Invest in the development operation: Assess and enhance the capabilities (skills, knowledge and experience) and the capacity (sufficient staff, database, equipment, and other resources) of the Development Office to do this work.
 - Articulate the case for support for endowment, its use, restrictions and investment strategy, e.g., socially responsible investing, return on investment, etc.
 - Assure engagement of Board members and other volunteers in the process of identifying, cultivating and soliciting gifts.
 - Devise an endowment-building strategy.
 - *Accountability and Timeframe: Institutional Advancement Committee, Administration, Staff. Ongoing.*

Goal #4: Maintain affordable tuition to enhance school diversity.

- **Key direction:** Saint Philomena School is committed to diversity. We recognize that affordable tuition is a major strategy to help achieve diversity. We recognize that without intentional action, our diversity will remain as it is now, and we aspire to greater diversity.
 - Determine how to balance our commitment to cost-based tuition and our commitment to accessibility and affordability.
 - Maintain comprehensive financial aid program.
 - Create more affordable tuition management systems.
 - Market our vision (and affordable tuition program) to a larger geographic and demographic base to recruit diverse audiences into the School.

- *Accountability and Timeframe: Administration and Board Finance Committee. Focus in 2004.*

Goal #5: Assure adequate services for students outside the traditional school day.

- **Key direction:** Family needs continue to change and Saint Philomena School wants to be responsive. Children need meaningful activities before and after school; parents and grandparents need and want care for their children outside of the school day.
 - Evaluate community needs and interests regarding additional programs, e.g., pre-school, extended day, sports, after-school programs, summer programs.
 - Devise appropriate plans to meet the needs.
 - *Accountability and Timeframe: Special Board/Parent/Faculty task force. Focus in 2005.*

Goal #6: Strengthen internal and external communications.

- **Key direction:** Our internal and external communications reflect our values of openness, integrity and accountability. Our communication is two-way and interactive with all constituencies. As we continue to plan the development of our internal and external communications, we will focus on:
 - Enhance website and Internet access and interactivity, both internally and externally.
 - Balance technology with personal interaction and personal responsibility.
 - Link back to Goal #4 (affordable tuition) and market the School to diverse audiences to ensure steady enrollments.
 - Devise persuasive and articulate marketing / communications / public relations strategies to position Saint Philomena School as a unique educational journey.
 - Enhance the School's capacity to do this work, e.g., adding marketing/communications/public relations capacity to the administrative infrastructure.
 - *Accountability and Timeframe: Administration and Communications Committee. Ongoing.*

Goal #7: Enhance ongoing evaluation and decision-making in all areas of operation and governance.

- **Key direction:** Highly effective management and governance foster continual evaluation and decision-making. Our clearly articulated philosophy, mission, vision and Plan set standards and assign responsibilities. The Board of Trustees plays a key role in conjunction with the FCJ community. For this new period, we will focus on:
 - Enhancing our committee structure and engaging new and diverse people.

- Continuing our use of and attention to the Strategic Plan and its added value.
- *Accountability and Timeframe: Administration and Board of Trustees. Ongoing.*

Goal #8: Assure adequate facilities and security to support our vision.

- **Key direction:** As we create our vision of the optimum learning environment, we will continue on our current path and focus on the following for the period 2003 – 2005:
 - ***Regarding facilities:***
 - Complete Master Plan by September 2004.
 - Complete construction of new building for grades 6-8 and open in September 2004.
 - Complete renovations to current 4th through 8th grade building by September 2005.
 - Review needs for Pre-K location and develop plans.
 - Incorporate technology as appropriate in all new and renovated facilities.
 - Devise maintenance plans for current and future facilities, which are both efficient and economic.
 - Ensure that facilities and maintenance are sufficiently flexible to accommodate changing needs, e.g., curriculum, economy, safety, etc.
 - ***Regarding safety and security:***
 - Evaluate current security and safety measures including campus security, personal safety of students and faculty and staff, emergency procedures, and risk management. Devise new plans and procedures as appropriate, and communicate them to families.
 - Evaluate and enhance as necessary security and risk management for databases, and so forth.
 - Utilize practice scenarios to develop efficiency and effectiveness.
 - *Accountability and Timeframe: Buildings and Grounds Committee of the Board, coupled with Administration, Faculty and Staff. Ongoing.*