

# **St. Philomena School**

**Stepping into the 21<sup>st</sup> century**

**Strategic Plan for January 2000 – December 2003**

**Adopted by the Board of Trustees on APRIL 3, 2000**

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## Overview of the strategic planning process

Early in 1999, St. Philomena School launched a strategic planning process to determine direction and focus for the next 3-5 years. The strategic planning process is intended to address the complex, long-range issues facing the School as it moves into the 21<sup>st</sup> century.

St. Philomena School recognizes that good decisions are made based on quality information. With this in mind, the School decided to conduct research to inform its planning process.

The research focused on a variety of issues identified at the Kick-Off Session for the Planning Process. Research was conducted by examining current information available. For example: self-assessments from the School's recent accreditation and application for the Blue Ribbon Award; search of relevant information on the Internet and in publications.

In addition, St. Philomena School initiated its own research. The method of collection included: personal interviews conducted by volunteers; written surveys directed at all current parents and students in the 4<sup>th</sup> through 7<sup>th</sup> grades; focus groups with parents (both current and past) and students in the 4<sup>th</sup> through 8<sup>th</sup> grades facilitated by the consultant; and, search of print and electronic information.

The planning consultant analyzed the research results, identified common themes and presented all research in a document entitled Findings Report. At the strategic planning retreat, attendees discussed the implications of these findings and then articulated a vision for the School's future.

Following the retreat, the Planning Committee hosted a meeting with parents and faculty and staff of the School. The vision was presented to attendees. Then attendees worked in small groups to brainstorm ways that the vision might be attained. Information from this community meeting – along with the Findings Report – will be used by the School's Board and committees, faculty, staff and administration to help implement the plan.

# Mission and Values

## Mission

St. Philomena School is a private Catholic school in the Diocese of Providence, under the guidance and leadership of the Sisters Faithful Companions of Jesus. Its mission is to enable each child to recognize and develop the unique gifts given by God. Called to this mission by God, the School educates the whole child – spiritually, intellectually, emotionally and physically.

Through the cooperation of the Sisters Faithful Companions of Jesus, the administration, the faculty, the students and their families, Christ’s message of Faith, Hope and Love is shared with the greater community.

## Values articulated at the Kick-Off to the Strategic Planning

A value is an enduring belief that a specific mode of conduct is personally or socially preferable to another. Values guide our actions and judgments. Our values are the standards, which influence us and help us make choices among alternative courses of action. Value systems are relatively permanent frameworks that shape and influence our behavior.

Individuals have values and so do groups. The group articulates its values so that members of the group can operate together through consensus and unity of purpose and action.

- Importance of a Catholic education
  - Concept of family and community
    - home and school working together
    - commitment and support system
    - strong relationships
    - rooted in moral foundation
  - Dignity of the individual: diversity, self esteem, fostering environment wherein individuals can excel and reach their full potential
  - Development of whole individual, e.g., academic, physical, spiritual, emotional
  - Accountability and responsibility
  - Justice, faith that does justice
    - service to others
    - respect for diversity and for creation
    - gratitude
  - Pursuit of knowledge and academic excellence
  - Open communication within the School family
  - Partnership between parents and teachers, dedication
  - Caring for current, past and future families: concept of Intergenerational equity
- Kindness
  - Nurturing
  - Fidelity
  - Fortitude
  - Respect
  - Trust, honesty and integrity

# Vision

## **Introduction**

St. Philomena School and its community of students, families, faculty and staff live out the School's stated values and philosophy everyday in every way. Our values and philosophy are clearly articulated and hold us to a high personal and communal standard. We use these values and philosophy to frame our vision and direction, guide our decision-making, and evaluate our performance.

We honor the charism of the Sisters, Faithful Companions of Jesus who founded St. Philomena School. We respect the history and tradition of the School, and also encourage innovative and creative approaches to teaching, spiritual and personal development, and administration and governance.

## **Curriculum**

Our curriculum seeks to build an educational community in which students, faculty and staff, administration, and the entire St. Philomena family share religious truths and values, explore human knowledge, develop individual gifts and talents, and foster critical thinking and decision-making. The environment at St. Philomena School encourages students to enjoy and value lifelong learning and to embrace and serve their local and world communities.

As an educational community, St. Philomena School uses a participatory process to create, continually assess, and improve a curriculum that is intellectually challenging, culturally diverse, and socially and globally aware. Our curriculum, which is defined by grade level and academic area, recognizes current educational philosophy and technological advances. The curriculum integrates educational standards, instructional materials, course content and teaching methodology to provide an excellent education for each student.

While a strength of our learning community is its flexibility and response to individual needs, our curriculum clearly provides a framework and standard for ensuring the accountability of the faculty, staff, administration, and the School itself. The curriculum allows students to progress as their God-given talents dictate, with remedial and accelerated programs based on the demands and interests of the students.

In our curriculum, we respect and use technology along with more traditional teaching and learning methods. We ensure that technology is appropriately integrated into the academic program and accessible to all students.

Our curriculum remains responsive to community needs just as it remains faithful to our philosophy. For example, if appropriate, we will evaluate the need for a Pre-K program. The School offers after-school sports and an extended day program.

## **Faculty and staff recruitment and retention**

St. Philomena School is the employer of choice among educational institutions. St. Philomena School employs dedicated, enthusiastic, creative, excellent, respectful, and diverse faculty and staff who support the mission, philosophy, vision and strategic plan of the School.

Our faculty and staff are open to new educational trends as well as management approaches and techniques that produce a solid bond between the faculty and staff and School community.

Our faculty and staff are fairly and competitively compensated with regard to both salary and benefit during their active employment and in retirement. St. Philomena School ensures that employees are provided with ample opportunities and incentives for individual professional development.

This vision is ensured through a faculty and staff performance evaluation process that is clear, fair and thorough, and includes professional development plans.

### **Administration and governance**

The governing bodies and administration of St. Philomena School empower others and encourage them to assume the appropriate level of individual responsibility. All members of the St. Philomena School are accountable for the health and effectiveness of the School.

We operate as a participatory community and encourage interactive dialogue that helps the community understand our educational endeavors.

A regular program of evaluation, based on clearly articulated goals and standards, is essential to all areas of operation, both within and beyond the classroom. We constantly improve our evaluation process by addressing our internal strengths and weaknesses as well as external opportunities and challenges.

We use the highest quality financial, management and marketplace data and processes to help the Board and management make the best short- and long-range strategic decisions that will assure the preservation of the vision and mission of the school.

We operate with a shared/team leadership model that is supported by the greater delegation of authority at all levels of the School, and encourages participatory decision-making whenever appropriate. Responsibility for the administrative functions is distributed among the leadership team. Empowered leadership facilitates succession planning and transition and ensures the long-term well being of the School.

The Sisters, Faithful Companions of Jesus, own the School and the FCJ's Board of Directors retains authority for certain decisions. In partnership with the FCJ Board of Directors, the School Board of Trustees carries out the due diligence and governance functions required for legal and moral responsibility. Together these boards and the faculty, staff and administration preserve the charism of the Sisters, Faithful Companions of Jesus while the lay leaders increase within the School community.

### **Financing**

St. Philomena School is financially stable and has the resources to achieve its vision.

We secure maximum funding from private and public sources, while balancing our acceptance of these resources with their restrictions and with the School's independence.

Our tuition is affordable for diverse constituencies, and is supported by a comprehensive financial aid program. Alternative tuition payment plans are available to support the diverse needs of the School's families.

Our compensation package (salary and benefits) attracts and retains quality faculty and staff and supports employee professional development.

We use the highest quality financial planning to assure the proper balance between risk and return on investment.

The School's endowment fund grows larger each year, and the steady income helps support the School's operations, maintenance and capital improvements.

The St. Philomena School family understands the School's financing in terms of opportunities and constraints. A comprehensive fund development program, which is based on best practice and professional management, regularly secures charitable contributions for operations, capital and endowment.

### **Communications**

Communication at St. Philomena School – both internal within the School family and external with the greater community – reflects our values of openness, integrity and accountability.

Our communication is two-way and interactive, whether among faculty, staff and administration, between the School and parents, between teachers and students, and with the greater community. We encourage and facilitate feedback and input. We listen well, respect what is said to us, and use this to learn and also to inform our decisions.

Our communication keeps the St. Philomena School family, including faculty and staff, students and parents, donors and volunteers, informed and knowledgeable about School issues. We also actively reach out to our former families and look to the greater community for future families.

Our parents have the information they need – for example, child's performance, School financing, curriculum and philosophy – to make the decisions they need to make. Our faculty, staff and administration have the information they need to participate as productive members of the St. Philomena School community.

Our communications program is organized into a cohesive written plan that meets the needs of both internal and external audiences. Our high-quality communications program ensures that constituents understand the School's philosophy, mission and values, vision and direction, and challenges and opportunities. As a result, the community clearly understands what St. Philomena seeks to achieve.

### **Facilities**

Our campus and facilities are an integral part of the St. Philomena School community. The pastoral environment is woven into our curriculum and we use our campus to its full capacity.

We have a comprehensive capital improvement plan with clearly set priorities and a financing plan to support capital expenses, which are independent from financial support by the FCJ Society.

## **Summary of goals to achieve our vision**

In order to achieve this vision, we have grouped our activities into the following eight goals. The strategies for carrying out these goals are described in the next section of this plan.

We recognize that we may not achieve our vision by June 30, 2003. Should that be the case, we will remain true to our vision and establish additional goals and strategies to move closer to our vision.

- Goal #1: Enhance our curriculum and the curriculum process.
- Goal #2: Improve our faculty and staff recruitment and retention.
- Goal #3: Develop a shared/team leadership model for School administration.
- Goal #4: Enhance the School's fund development (charitable contributions) program.
- Goal #5: Increase the School's endowment.
- Goal #6: Strengthen internal and external communications.
- Goal #7: Enhance on-going evaluation and decision-making in all areas of operation and governance.
- Goal #8: Assure adequate facilities to support our vision.

## Carrying out the strategic plan, 2000 –2003

This section of the plan restates our goals and outlines the strategies to achieve those goals.

We keep the **vision** in front of us at all times to provide us with the richness and depth of detail to see the hoped-for results of our goals and strategies. We use the Market Research Findings Report and notes from the community meeting to help us implement the strategic plan.

**Assignments of responsibility** are stipulated to carry out these strategies. However, it is critical that we remember: The School Principal and the Board of Trustees are ultimately responsible for implementation of the strategic plan and achievement of the vision and mission, no matter which other group may be assigned a function. All task forces, committees and Administration report to the Board regarding progress of the plan.

**Timeframes** synchronize with the School's fiscal year, July 1 – June 30.

July/August/September	1 <sup>st</sup> quarter	January/February/March	3 <sup>rd</sup> quarter
October/November/December	2 <sup>nd</sup> quarter	April/May/June	4 <sup>th</sup> quarter

### **Goal #1: Enhance our curriculum and the curriculum process.**

- A. Enhance our operations as a learning community for students, faculty and staff by establishing benchmarks for measurement of success, providing training to faculty and staff, and appraising performance to assure accountability.
- B. Examine various standards in each curriculum area, decide which standards to adopt for St. Philomena School, and incorporate these standards.
- C. Establish a process to ensure that adopted standards are implemented and that teachers and administrators are held accountable for outcomes.
- D. Design and implement a process to continually assess and improve the School's curriculum.
- E. Expand the function of the curriculum committees so that they are responsible for creating, continually assessing, and improving a curriculum that is culturally diverse, socially cognizant, and globally aware. Fairly compensate committee chairpersons for their time.
- F. Develop and implement the process and tools within the curriculum to allow students to develop their potential. Enhance remediation and enrichment opportunities.
- G. Design and secure the materials and equipment, and design the space to carry out the objectives of the curriculum.
- H. Develop and implement a plan to integrate technology into all subject areas, as appropriate. Ensure accessibility to all students and assure teacher competence, comfort and accountability.

- I. Design and implement a comprehensive program of faculty and staff professional development to assure the necessary expertise for curriculum implementation.

Timeframe and assignment of responsibility

- By June 2002, the curriculum enhancement process will be completed and an ongoing process will be in place.
- Responsibility: Faculty Curriculum Committees and Administration
- Consult with: Finance Committee and Buildings and Grounds Committee
- Keep Board informed of progress: Donald Coletti and Jen Abbate

**Goal #2: Improve our faculty and staff recruitment and retention.**

- A. 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.
- B. Enhance the faculty and staff retirement program.
- C. Develop and institute a more competitive salary scale for all employees. Ensure that the people on the top step receive at least a cost of living increase annually and compensate faculty for advanced degrees.
- D. Evaluate and enhance the School's professional development program to ensure ample opportunity and incentives for individual development.
- E. Develop and implement a faculty and staff evaluation process that is clear, fair and thorough and which includes a professional development plan.

Timeframe and assignment of responsibility

- By November 2001, the new program will be presented to the Board.
- Responsibility: Ad Hoc Faculty/Staff Task Force
- Consult with: Finance Committee (regarding compensation) and Mission Effectiveness Committee (regarding professional development)
- Keep Board informed of progress: John Wilmot and Mary Connolly

**Goal #3: Develop a shared/team leadership model for School administration.**

- A. Define shared team leadership model for St. Philomena School by examining models used in comparable schools as well as best practices in team management.
- B. Identify and promote individuals to take on leadership roles within the new team model.
- C. Develop and implement the new model.
- D. Evaluate effectiveness of the model by defining appropriate benchmarks. Modify as necessary.
- E. Develop people's skills to actively participate in this shared team leadership by providing training, support and ongoing feedback.

- F. Hold people accountable by including shared team leadership in job descriptions and performance appraisal.
- G. Promote and recruit with consideration for shared team leadership.
- H. Provide shadowing and mentoring to support the new leadership team.

Timeframe and assignment of responsibility

- By June 2000, the Board will review the model.
- By January 2001, develop the new model
- By Sept. 2001, implementation of the new model.
- Responsibility: Ad Hoc Task Force
- Consult with: Administration, Mission Effectiveness Committee and Board Self-Development Committee
- Keep Board informed of progress: Lou DiPalma

**Goal #4: Enhance the School's fund development (charitable contributions) program.**

The School will need professional guidance to enhance its fund development program. In a 6-9-month period, a fund development consultant can help the School address items A-G below, through training and hands-on assistance. Thereafter, the School can institutionalize these learnings within operations.

- A. Clearly define the development roles for the Board, FCJ Society, Parents Club, faculty and staff, and define how these roles / groups relate to each other for the purposes of fund development.
- B. Evaluate the School's current development program (development office and Parents Club) and design an integrated, comprehensive charitable giving program that includes major gifts as well as events and/or activities.
- C. Develop and implement a comprehensive fund development plan. Monitor progress and evaluate performance.
- D. Orient and train staff, faculty, trustees, Parents Club and other volunteers regarding best practice and the body of knowledge in philanthropic fund development.
- E. Devise a plan and methods to clearly communicate to and educate the St. Philomena School Family about the important role of charitable giving and fund development in the health of the School. Engage these constituencies in the process of fund development.
- F. Clearly articulate the reasons for supporting St. Philomena School.
- G. Develop policies, procedures and systems to support fund development at the School.

Timeframe and assignment of responsibility

- By June 2000, hire the consultant. By fall 2000, begin consultancy.
- By March 2001, new model is designed.
- By June 2001, the new model is working well.

- Responsibility: Institutional Advancement Committee, Director of Admissions/Development, consultant
- Consult with: Finance Committee, Parents Club
- Keep Board informed of progress: Henry Stevens

**Goal #5: Increase the School's endowment.**

This goal can only be achieved once Goal #4, enhancing fund development, has been addressed.

- Outline financial parameters and goals for an endowment fund.
- Review and as necessary revise the School's investment, gift acceptance, and recognition policies to support the growth of an endowment fund.
- Clearly articulate the purpose and benefit of an endowment fund to support St. Philomena School.
- Develop a fund-raising plan to build the endowment fund and raise the money.

Timeframe and assignment of responsibility

By June 2000, hire consultant.

- Rest of schedule to be determined based on fund development consultancy.
- Responsibility: Institutional Advancement Committee, Director of Admissions and Development, consultant
- Keep Board informed of progress: Henry Stevens

**Goal #6: Strengthen internal and external communications.**

The School will need professional guidance to enhance its marketing and communications program. In a 3-4-month period, a marketing/communications consultant can help the School address items A-E below.

- Identify and evaluate current communications instruments, assessing target audiences, means of communication and content information.
- Identify areas where communications should be improved or enhanced and developed, considering all constituents (FCJ, administration, faculty, staff, parents, students, alumni, past parents and the greater community).
- Develop and implement a comprehensive communications plan (both internal and external) for St. Philomena School, inspired by and promoting the School's mission and philosophy and the FCJ charism. Monitor progress and intervene as necessary.
- Develop and enhance multiple modes of communication, with redundancy of information (via newsletter, website, and other venues) and multiplicity of formats (written, graphic, interpersonal), to assure effective dissemination of information.

- E. Develop and implement a means to evaluate communications, to assure that constituent perception is aligned with the School's desired image (externally), and with the School's day-to-day operations, i.e., curriculum, finance, student performance and activities, etc. (internally).

Timeframe and assignment of responsibility

- During academic year 2000, School improves communications with parents.
- By June 2001, new marketing / public relations program is in place and operating well.
- Responsibility: Ad Hoc Task Force and Director of Admissions/Development
- Keep Board informed of progress: Lou DiPalma

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

- A. Integrate short- and long-term planning and evaluation as a standing function within School operations.
- (Administration and Board, starting now.)
- B. Devise systems and procedures to collect and analyze strategic and operational data in all relevant areas including fiscal, governance, curriculum and technology, internal and external communications, recruitment and retention of qualified faculty and staff, and fund development.
- (Administration, Board and Board committees. All committees schedule this work within their own work plans. Collection processes should begin in 2001 for use in annual planning retreat in the fall of 2001.)
- C. Establish standards and benchmarks to measure performance, cost effectiveness and accountability. Monitor adherence and intervene as necessary.
- (Board, following recommendations from Administration and committees. All committees schedule this work within their own work plans. Benchmarks help measure whether or not the School has achieved a particular goal.)
- D. Strengthen Board recruitment and evaluation process in order to recruit committed and diverse Board members and utilize their expertise in governance, fund development, and planning and evaluation.
- (Board Self-Development Committee. Focus of work in 2000 for implementation in 2001.)
- E. Utilize the strategic plan as the agenda for Board meetings. (Board Chairperson)
- F. Measure and balance all decision-making with due regard for the School's mission and philosophy.
- (Everyone. Ongoing)
- G. Update strategic plan in 2003. (Board)
- H. Annually conduct a planning retreat to review progress of the multi-year strategic plan and determine priorities for the next fiscal year. Use this information as the foundation for the budgeting process and School direction for the year.
- (Administration and Executive Committee)

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

- A. Conduct a utilization study. Begin in June 2000 and complete by Sept. 2001.
- B. Develop a master site plan. Begin in November 2001 and complete by March 2002.
- C. Outline cost and conduct a feasibility study (complete by March, 2003).
- D. Based on results of the study, design and prepare ( by June, 2003) for a capital initiative that incorporates endowment and facilities. (Complete by March, 2004).

Timeframe and assignment of responsibility

- Responsibility: Institutional Advancement Committee, Director of Admissions and Development, consultant, Buildings and Grounds Committee
- Keep Board informed of progress: Allen Shers, Bernadette Sabra

## Monitoring progress of the strategic plan

Our plan is a living document. We use it to shape the course of our work and to set our annual goals and budget. We use the plan (and the community brainstorming and Findings Results) to inform our work.

Our intent is to achieve our vision. The strategic plan outlines how we will move from current reality to our vision, the dream of our future.

By redesigning our Board meetings, we will focus on the vision and strategic plan. We will ask ourselves:

- What is the progress we have made on our goals? Why or why not? We will discuss our strategies and if a strategy has been changed, we will explain why.
- How well are our committees focusing on and following the plan? What needs to be changed?
- Is there new information that might require adjustment of the plan and when and how will we make those adjustments?

The administration will use the vision and plan in the following ways:

- To direct the work of faculty, administrators and staff
- To evaluate the performance of faculty, administrators and staff
- To determine budget allocations
- To recruit employees

Annually, we will conduct a planning retreat. The retreat will be scheduled prior to developing the budget. The retreat will review progress on the multi-year strategic plan, discuss any new information, determine priorities for the new fiscal year, and modify goals and strategies as necessary. Based on the results of this retreat, the Finance Committee and Administration will prepare the budget.

Immediately following the annual planning retreat, Administration and Board committees will develop the work plan for each committee and assign timeframes for strategies and activities.

We will inform the entire St. Philomena community about progress of the plan through the following means:

- Quarterly written update (a letter, in a newsletter, etc.)
- Annual report card
- Celebration of important milestones.

## **Financing the strategic plan**

Our annual budgeting process is based on the multi-year strategic plan and the annual goal setting process.

Because we have a multi-year strategic plan, we need multi-year financial projections. The Finance Committee will prepare multi-year financial projections – based on this strategic plan – for review with the Board in the fall of 2000. In some cases, the multi-year projections will note that a cost is not yet available but would be estimated at a later time.

Our multi-year projections do not substitute for the annual budgeting process. The multi-year projections are simply intended to show us possible patterns and times when we will have to accelerate our fund raising or secure dollars in some other way.

## Timetable for the strategic plan

Academic year 2000	Enhance communications with parents. Begin curriculum enhancement study
June 2000	Board reviews shared/team leadership model. Hire fund-development consultant. Begin space utilization study. Begin development of faculty & staff recruitment and retention study
Fall 2000	Annual retreat to establish goals for FY 2002 (July 1, 2001 – June 30, 2002) Strengthen Board recruitment and evaluation process Begin fund development consultancy. Review multi-year financial projections.
January 2001	Develop shared/team leadership model. Adopt budget for FY 2002 Engage communication & marketing consultant
March 2001	Begin to outline cost & financial plan. Fund development program designed.
Election 2001	In place: Board member assessment process, biennial Board assessment process, enhanced candidate screening and recruitment, and Board orientation.
June 2001	Improved fund development program is in place. Improved marketing and public relations program in place.
Fall 2001	Implementation of shared team leadership model. Space utilization study completed. Annual retreat to establish goals for FY 2003 (July 1, 2002 – June 30, 2003) Board decides how to proceed with endowment program.
November 2001	Enhanced faculty and staff recruitment and retention program in place. Initiate development of master site plan.
January 2002	Approve budget for FY 2003
March 2002	Master site plan completed. Conduct a fund-raising feasibility study.
June 2002	New curriculum ready for launch.
Fall 2002	Annual retreat to establish goals for FY 2004 (July 1, 2003 – June 30, 2004) Board decides how to proceed with fund development for facilities and endowment.

2002/2003	Possible capital initiative for facilities and endowment
January 2003	Adopt budget for FY 2004 (July 1, 2003 – June 30, 2004) Initiate strategic planning process to review vision and extend plan to achieve vision.
March 2003	Complete cost & financial plan (Goal #8)
Fall 2003	Annual retreat to establish goals for FY 2005 Update strategic plan.
January 2004	Adopt budget for FY 2005 (July 1, 2004 – June 30, 2005)