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CATHOLIC SCHOOL MANAGEMENT

LetterSM

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SPECIAL ISSUE

Managing Successful Catholic Schools in Difficult Financial Times

As we “ring in” and practice writing *2009*, many of us are happy to see the 2008 calendar year behind us. The stock market has experienced its steepest decline in more than thirty years, and pensions, endowments, and general portfolios have declined by more than 35% in some cases. The housing crisis, in terms of both foreclosures and increasingly larger mortgage payments for many, has triggered rising homelessness and disruptions within many families. The overall economic outlook and credit crisis have combined with even higher unemployment rates and anxiety with regard to job security in virtually every state.

Catholic school Board members and administrators report that they have already experienced fallout from these extremely difficult times. The most frequent symptoms being experienced within the Catholic school setting include:

- Declines in enrollment;
- Inability to pay tuition;
- Decreasing annual giving programs;
- Delinquencies on pledge payments for capital campaigns and reductions in capital campaign pledges.

With thirty-five years of experience in working with – and ensuring the success of – Catholic schools, Catholic School Management consultants offer the following advice for Diocesan superintendents, pastors, Board members, and school administrators.

First, and foremost, don’t be taken in by “quick-fix schemes” offered by planners and consultants with little experience. Seminars on “increasing enrollment,” as well as advertising and public relations programs, are most frequently generic, untested, costly, ineffective, and sometimes counterproductive.

Second, it is more important than ever to reaffirm the foundation of the Catholic school's existence and for Board members and administrators to exercise the fundamentals of sound Catholic school management. Research indicates that parents send their children to Catholic schools for three primary reasons:

- A perception of better academic quality;
- Structure, safety, and discipline;
- Religious values integrated with the curriculum.

By continuing to provide for these needs in the best possible manner during these challenging times, and by regularly testing parent and student satisfaction, the Catholic school can remain a beacon of hope for parents and families who may be struggling with unemployment, housing issues, and general financial uncertainty.

On a positive note, there are many things that Catholic school administrators and Board members can do right now to enhance the image and enrollment of their schools. To manage successfully issues unique to the Catholic school in a more positive, productive, and relevant manner, the following should be addressed immediately:

1. Does the school have a clear statement of philosophy which includes the following points?
 - The school integrates elements of faith with learning;
 - The school teaches a well-articulated program of religion and proclaims Gospel values;
 - The school is a proponent of Community Service Learning Programs;
 - The school provides worship opportunities, Liturgies, para-liturgical services, and retreats.
2. Does the school have a clear statement of mission which describes what the school does and whom it serves and how?
 - The mission statement is both a positioning and differentiating document for the school.

3. Does the school have a statement of vision for the future which is regularly promulgated and proclaimed?
 - The vision is clear and compelling;
 - Administrators regularly speak of mission and vision.
4. Does the school publish and utilize a profile of the graduate at graduation and frequently test both parent expectations and student outcomes against the profile?
5. Does the School Board have a standing "Mission Enhancement/Effectiveness Committee" that monitors Catholic identity and each of the above?
6. Do the School Board and administration maintain, implement, and monitor a strategic long-range plan with specific goal statements, objectives, strategies, and tactics?
7. Is the strategic plan supported by individual long-range plans in the areas of:
 - Enrollment;
 - Communication;
 - Marketing;
 - Development;
 - Curriculum;
 - Technology;
 - Finance?
8. Has a Comprehensive Enrollment Management Plan been prepared addressing issues of student recruitment, admission, and student retention?
9. Is regular in-service training provided for teachers, administrators, and support staff with regard to their roles in marketing the Catholic school for image and enrollment?
10. Are clear strategies to enhance student retention implemented each year?
11. Is a student recruitment plan which actively involves current parents and teachers in place and implemented with "satisfied parents and students as your best ambassadors?"

12. Do administrators survey parents and students annually to assess, address, and enhance their overall satisfaction with school programs?
13. Is a Comprehensive Development Plan in place and implemented with components for communication, marketing, fundraising coordination, annual giving, and planned giving programs for endowment growth?
14. Is the annual giving program multi-phased and designed to involve a large number of constituencies in each phase?
15. Is a planned giving program designed and implemented with an emphasis on communicating and cultivating planned gifts such as bequests, life insurance, trusts, property, and securities?
16. Is the academic program well known to parents?
17. Are standardized test scores published in relation to national and state norms?
18. Is there a detailed plan for integrating technology with the teaching/learning process?
19. Does the school have and utilize a well-defined budget development process and timeline?
20. Is the annual operating budget revised at the beginning of the school year?
21. Is the final school budget calendarized in a non-linear format, and are cash flows projected and monitored throughout the year?
22. Are financial reports prepared on a monthly basis and reviewed in detail by the finance committee of the Board, and are results shared with Board members?
23. Are end-of-year financial reports published in the school's annual report?
24. Are financial assistance programs enhanced so that students of parents who have recently lost their jobs may continue to benefit from an education in the Catholic school?
25. Is the school's website well designed and updated on a regular, frequent, and consistent basis? Consider:
 - Design/Layout;
 - Ease of navigation;
 - Pictures (be sure to obtain written permission for the use of student photographs);
 - Information for prospective parents;
 - Calendar;
 - Academic program information;
 - Student activity information;
 - Sports updated;
 - Links to relevant websites such as:
 - NCEA;
 - Diocese;
 - Accrediting agencies.
26. Are relationships developed/maintained with feeder school administrators, area pastors, and directors of religious education to provide information on the effectiveness of the Catholic school (for secondary schools)?
27. Are relationships developed/maintained with secondary school administrators and Board members (for elementary schools)?
28. Are relationships developed/maintained with daycare providers, nursery school teachers, and parents of preschool-age students (for elementary schools)?
29. Do school administrators and Board members maintain regular communication with those involved in the parish program of pre-baptismal instruction (for elementary schools)?
30. Are current parents and students encouraged to post positive responses on key websites such as:
 - www.greatschools.net; and
 - www.privateschoolreview.com?



Catholic School Management, Inc. is a full-service, comprehensive, consulting organization supporting Catholic Education with research, direct consultative guidance, training programs and publications. CSM provides the highest level of professional and personalized service to Catholic educational institutions both within the United States and internationally.

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Strategically managing a school in difficult times requires vision, hope, passion, and a commitment to both the Gospel message and the mission of the school. First, and foremost, decisions must, in all cases, be “mission-driven.”

Priorities must be established in terms of budget development, budget revision, budget monitoring, and financial reporting. Additionally, development priorities need to be shifted to ensure that families who have been negatively impacted by the economy are not excluded from the benefits of a Catholic school. This requires new and creative fundraising and friend-raising for the benefit of individual students.

Schools can successfully manage enrollment during this time of financial uncertainty by remaining student-centered, focusing on the hallmarks of a Catholic education, and ensuring that families consistently receive much more than their tuition dollar’s worth of value. High parent satisfaction and notable student success cultivates stable enrollment by guaranteeing that a Catholic education is not considered a luxury, but an absolute necessity.

The Catholic school is uniquely called and equipped to minister and serve its community with compassion and encouragement during these difficult times. Offering prayer and emotional support to families in need may, indeed, be among the most positive, productive, and relevant actions a School Board, administration, faculty, staff, and students can take to live out and realize the school’s mission in a real, visible, and meaningful way.

Consistent and long-term planning and program development are the school’s best strategies for addressing any concerns from parents. Do not lose sight of long-term goals while attending to immediate priorities. Your partnership with CSM provides you with tested strategies and a staff of experts in the areas of Catholic school management, marketing, enrollment, education, finance, and development. Like you, we are passionate about, and committed to, the long-term success of Catholic schools.

For more information or for services contact CSM directly at 203-421-5169 or visit our website at www.catholicschoolmgmt.com.

Additional relevant *Catholic School Management Letter* resources include:

- Volume XXVIII, No. 3, “Clarity of Mission: Essential to the Success of Catholic Schools;”
- Volume XXVII, No. 3, “Strategic Planning for Catholic Schools;”
- Volume XXI, No. 3, “Enrollment Management Issues for the Catholic School;”
- Volume XXIV, No. 1, “Student Recruitment and Retention: Matching Strategies and Research;”
- Volume XXVI, No. 4, “Marketing and Enrollment Management Issues: Maximizing the Impact of the Student Recruitment Visit through Preparation and Personalization;”
- Volume XXVII, No. 2, “Marketing the Catholic Elementary School to ‘Generation X’ Parents;”
- Volume XXX, No. 1, “A Catholic School Financial Planning Model;”
- Volume XXX, No. 2, “The Catholic School Budget Development Process and Timeline;”
- Volume XXX, No. 3, “Monitoring and Controlling Cash Flow.”

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