

Shrine of St. Jude

Catholic School

Strategic Plan

September 2009

Table of Contents

<u>Subject</u>	<u>Page Number</u>
Introduction	3
Strategic Imperatives	4
Strategic Imperatives and Long Range Goals	4
Long Range Goal # 1 and its Supporting Goals	5
Long Range Goal #2 and its Supporting Goals	10
Long Range Goal #3 and its Supporting Goals	13
Long Range Goal #4 and its Supporting Goals	14
Strategic and Operational Key Measures of Performance	17
Organizational Alignment Chart	19

Introduction

This Strategic Plan represents the product of the Shrine of St. Jude Catholic School Marketing Development Team (MDT). The MDT met over the course of the 2008/2009 school year working on various issues important to our school. The primary product of the MDT is this St. Jude Catholic School (SJCS) Strategic Plan. Additional critical products instrumental in the creation of this Plan are:

Our Mission: St. Jude Catholic School educates the whole child, delivering academic excellence within a Catholic community of faith.

Our Vision: St. Jude will be recognized as a school unique in its academic excellence, Catholic identity, contributions to the community, financial stability, and bright view of the future.

and our Tag Line: "Catch Our Spirit"

There were also other issues and events that were addressed by this team, including supporting the Catholic Schools Week Open House and starting a sub-group known as the Financial Freedom Team (FFT). The FFT in turn, with the approval of the MDT, initiated the annual Offertory Collection and the Parish Auction Night both for the benefit of St. Jude's School.

When reading this plan it is very obvious that its success is related to the involvement of many others outside the membership of the MDT. These "others" include the School Advisory Board, Home and School Association, and individuals selected based on their talents and ability to contribute to this plan.

The successful outcome of any planning effort is directly related to the commitment on the part of those involved in its implementation. The successful implementation of the Shrine of St. Jude Catholic School's Strategic Plan is no different. It is totally dependent of the generous contribution of the time and talents of each volunteering person.

The membership of the Marketing Development Team are Ms. Mary Ellen Jordan, Principal; Mrs. Mary Kay Frazier, Assistant Principal; Mrs. Maureen Richter, Librarian; Mr. Kevin Ferrick, parent; Mrs. Patty Lynch, parent; and Mr. Bob Myers, past parent and facilitator to the MDT.

Mary Ellen Jordan
Principal
St. Jude Catholic School

Rev. J. William Hines
Pastor
Shrine of St. Jude

Strategic Imperatives

Enrollment Growth and Stability

Financial Strength

Catholic Identity

Academic Superiority

Strategic Imperatives and Long Range Goals

Imperative #1 - Enrollment Growth and Stability

Long Range Goal # 1 – By the year 2015, the K-8 enrollment will be maintained at 30 students per grade for grades 1-8 and 25 students for Kindergarten, for a total enrollment of 265 students.

Imperative #2 - Financial Strength

Long Range Goal #2 - By 2015 St. Jude Catholic School will be self-sustaining financially, with tuition revenue, financial aid, endowment support, and fund raising meeting all salary and daily operational requirements.

Imperative #3 - Catholic Identity

Long Range Goal #3 – Between 2009 and 2015 St. Jude Catholic School will continue to meet all requirements and criteria set forth by the May 21, 2009 draft “Proposed Policies for Catholic Schools 2009”

Imperative #4 - Academic Superiority

Long Range Goal #4: By 2015 St. Jude Catholic School will achieve Archdiocesan academic excellence requirements, through academic testing, benchmark comparisons, and state of the art facilities.

<p style="text-align: center;">Long Range and Annual Goals for Imperative #1- Enrollment Growth and Stability</p>
--

Long Range Goal # 1 – By the year 2015, the K-8 enrollment will be maintained at 30 students per grade for grades 1-8 and 25 students for Kindergarten, for a total enrollment of 265 students.

Lead: School Administrator

Team: School Leadership Team (SLT)

Measures: Number of Students per grade (K-8)

Assumptions:

- Enrollment is directly related to effective marketing. The more successful the marketing, the higher will be the enrollment.
- Aggressive marketing will be focused on the Kindergarten and 1st grade entry classes and the retention of these classes as the students advance through the 2nd to 8th grades.
- Grades 5, 6, 7, and 8 continues to move to one classroom
- Efforts will focus on achieving maximum class room capacity of 30 students per grade.
- SJCS will be responsible for the marketing lead, and not rely on any Archdiocesan support.

Annual Goals

1.1 Enrollment Growth: 2009-2017

Lead: School Administrator

Team: SLT

Measures: Students per grade

Year	2009	2010	2011	2012	2013	2014	2015	2016	2017
Grade									
K	22	23	24	25	25	25	25	25	25
1	27	28	29	30	30	30	30	30	30
2	27	28	29	30	30	30	30	30	30
3	27	28	29	30	30	30	30	30	30
4	27	28	29	30	30	30	30	30	30
5		28	29	30	30	30	30	30	30
6			29	30	30	30	30	30	30
7				30	30	30	30	30	30
8					30	30	30	30	30
Total									
Enrollment	130	163	198	235	265	265	265	265	265
% capacity	87%	90%	94%	98%	100%	100%	100%	100%	100%

Above enrollment does not include the two rooms per grade numbers for Grades 5 – 8 for the years 2009 – 2010.

1.2 Aggressively Market St. Jude Catholic School:

- Establish aggressive, continuous, creative, and effective results oriented marketing to promote St. Jude Catholic School as being totally unique and offering the best Catholic/Academic education available in the Archdiocese and Montgomery County.
- Establish relationships with the business community
- Improve relationships with parishioners and parish organizations both at St. Jude and St. Francis

Lead: Chair, School Advisory Board

Team: School Advisory Board Marketing Team

Measures: Varies by Goal

1.2.1 Hold Open Houses in November, January, and April

Build on each Open House success and incorporate these into the next Open House – continuously improving each Open House.

Lead: School Administration

Team: Open House Committee (to be selected by HSA)

Measures: Number in attendance by grade interest; number selecting SJCS by grade

1.2.2 Promote and Advertise the School to Parents, Parishioners, and Members of the Local Community

- Sunday Morning Socials - Sponsored by SJCS
 - Four times during the school year (Dates to be determined)
 - Location preferably in the school library and main entrance (CCD coordination is required)

Lead/Team: Liz Welton, Maureen Richter, Gail Sauers,

Measures: Number in attendance

- Establish relationships with families of new parishioners, and families of new born babies
 - Welcome newborns into the St. Jude family as a member of the SJCS Class of XXXX)
 - Extend welcome from SJCS to new St. Jude families

Lead: Melanie Corless

Team: School Administration and Alicia Mays

Measures: Number of families welcomed (new borns and new SJ families)

1.2.2 Promote and Advertise the School to Parents, Parishioners, and Members of the Local Community (continued)

Signage, yard signs, bumper Stickers advertising SJCS

Lead: Maureen Richter

Team: Gina Junghans, Patty MacTigue

Measures: Signage, yard signs, and bumper stickers are procured and in use.

1.2.3 Reach out to Recruit Students from the Hispanic Community

- Establish a working/marketing team to renew and increase an outreach to the Hispanic Community on the importance of registering in the Parish and educating their children in our Parish School.
- Work to get more of the Hispanic Community to register as Parishioners.
- Develop an ambitious marketing plan with key members of the Hispanic Community (Including Fr. Esposito), Hispanic Ministry Office, and key members of community).

Lead: Richard Vasquez

Team: Fr. Juan, Member of Hispanic Community, and School Parent

Measures: Number registering in the parish
Number registering in SJCS

1.2.4 Continually Share our Success Stories

- Continually and aggressively tell our success stories (Current students, teachers, and alumni) making generous use of Bulletin Inserts and Articles, Parish Times, Catholic Standard, Gazette.
- Develop archives to record and retain in an easy retrieval form, all these success stories.
- Consider developing a display on St. Jude's through the years (similar to one in the main hallway at Good Counsel)

Lead: Maureen Richter and Maureen Martin

Team: Class room reps

Measures: Number of stories by publication by year

1.2.5 Enhance efforts from the Rectory to Promote Parishioner support of our Catholic School

- Sell the concept that everyone in the Parish is in sales, marketing, and promotion of the Parish School.
- Promote an understanding for the importance of each Parishioner's time, talent, and treasure in support of the school

Lead: Bob Myers

Team: Mary Kay Frazier (Rectory Member)

Measures: TBD

1.2.6 Form a "Regional" school with St. Francis Parish

Meet with new pastor at St. Francis to see if a "Regional School" for St. Jude and St. Francis could be set up. (This would be financially beneficial to St. Francis it would reduce their ADW 9% surcharge and help SJCS. Currently St. Francis spends \$40,000 for SJCS and \$50,000 for St. Elizabeth's) Fr. Hines would have to speak with new Pastor. We need to start dialogue before St. Elizabeth's does!

Lead: Father Hines

Team: Mary Ellen Jordan, Linda Foster, Nancy Currier

Measures: Regional School is formalized

**Long Range and Annual Goals
for
Imperative #2 - Financial Strength**

Long Range Goal #2 - By 2015 St. Jude Catholic School will be self-sustaining financially, with tuition revenue, financial aid, endowment support, and fund raising meeting all salary and daily operational requirements.

Lead: School Administrator

Team: Rich Harrington, Mary Kay Frazier, Vince Arendes

Measures: Income minus expenses (reported monthly)

Assumptions:

- Realization that to make money we may need to spend some money (with a mindset that any expenditure considers its return on the investment).

Annual Goals

2.1 Publicize available tuition assistance funds from the Diocese 2009/10

Using Diocesan Guidelines provide the necessary information and assistance to families to minimize the occurrence of students leaving (or not attending) SJCS due to a lack of money.

Lead: Mary Kay Frazier

Team: School Administration

Measures: Information is provided to all parents and shared at each Open House

2.2 Manage the Endowment Fund 2009/10

Re-form and re-convene the Endowment Fund Oversight Group to provide oversight and good financial management of the funds for school use:

- Class room technology updates?
- School modernization such as windows to improve energy costs?

Lead: Father Hines, Bob Myers

Team: George Cruz, Mary Kay Frazier

Measures: Oversight Group is formed

2.3 Establish a complete and active Alumni Directory and Database 2009 - 2011

Lead: Maureen Richter

Team: Patty Lynch, HSA Member

Measures: Alumni Directory and Data Base estimated % complete

2.4 Establish Fund Raising Efforts to Yield \$100,000 for 2009/10

Based on Diocesan guidance that fund raising should be at least 5% of the total school expenses

2.4.1 “Give Your Way” Campaign - \$20,000

Enhance and expand on the “Give Your Way” campaign as the primary “school sponsored” fund raising program

Lead: Patty Lynch

Team: Amy Oristian, Adrian Flynn

Measures: Dollars raised

2.4.2 Home and School Association - \$5,000

Lead: Clare Kuzma

Team: Linda Foster, Adrian Flynn, Angie Morris

Measures: Dollars raised

2.4.3 Parish Family Auction Night - \$50,000

Annual Parish Dinner and Auction Night for the benefit of SJCS with goal of \$50,000 (Parish Sponsored Event)

Lead: Cecilia Rowedder

Team: Auction Task Group

Measures: Dollars raised

2.4.4 Parish Offertory Collection - \$15,000

Have Offertory Collection during Catholic Schools Week for support of the school with a goal of \$10,000

Note: If ADW establishes a Diocesan “School” offertory collection (offsetting our own collection) we may be able to counter this through support of Give Your Way , i.e., we could send “Give Your Way” letter to parishioners, explaining that all donations will go directly to the support of our Parish School)

Lead: Bob Myers

Team: Financial Freedom Team

Measures: Dollars raised

2.4.5 Business/Parish Community – \$10,000

Establish relationships with the business community to obtain support for scholarships and financial aid.

Lead: Bob Myers

Team: Financial Freedom Team

Measures: Dollars raised

2.5 Select a “Development Person” to Oversee all Parish Fund Raising

The Development Person will lead all such efforts freeing parishioners to provide assistance and removing an enormous burden of Parents/Parishioners heading up such efforts. All development efforts will be based on what will bring in the maximum return (The person will be tuned into all successful/unsuccessful efforts). All fund raising and development will be coordinated and aligned to eliminate duplication of efforts.

- Establish accountability, accounting, and audit oversight of all funds raised
- Volunteer basis at first
- Move to part-time paid (if it is justified by the income generated)
- The return must be greater than the investment

Lead: Bob Myers

Team: Maureen Richter, Kevin Ferrick,

Measures: Development Person is selected and working

**Long Range and Annual Goals
for
Imperative #3 - Catholic Identity**

Long Range Goal #3 – Between 2009 and 2015 St. Jude Catholic School will continue to meet all requirements and criteria set forth by the May 21, 2009 draft “Proposed Policies for Catholic Schools 2009”

Lead: School Administration

Team: SJCS Religion Faculty and member of Rectory

Measures: Archdiocesan annual review

Annual Goals

3.1 Goals:

To be developed by Religion Teachers and Rectory incorporating the following guidelines from the Archdiocese:

- Communion and cooperation with the bishop
- Appropriate celebration of sacramental life
- Teaching of the Faith
- Environment permeated with the Gospel spirit

3.2 Goals:

Benchmark and identify why the Heights, Avalon, etc. have a market for their “Catholic Identity”?

**Long Range and Annual Goals
for
Imperative #4 - Academic Superiority**

Long Range Goal #4: By 2015 St. Jude Catholic School will achieve Archdiocesan academic excellence requirements, through academic testing, benchmark comparisons, and state of the art facilities.

Lead: Mary Ellen Jordan

Team: School administration and faculty

Measures: Varies by goal

Annual Goals

4.1 Establish Key Measures of Performance

Assumptions:

- We are able to obtain comparative key measure of performance from the Diocese.
- If the Diocese does not release the required key measures, then alternative measure that reflect academic and operational performance will be identified and pursued.

4.1.1 Measures Related to Operations - 2009/2010

- Establish key operational measures of performance related to academics, enrollment, parent/faculty/students survey results and satisfaction levels.
- Establish key measures for benchmarking comparisons with the competition or national standards

Lead: Mary Ellen Jordan

Team: Bob Myers, Mary Kay Frazier, Members of the Faculty

Measures: Measures are in place with data

4.1.2 Measures Related to Academic Performance - 2009 to 2013

St. Jude students at the 4th and 7th grade levels will place in the top 10% of academic testing (Terra Nova) as compared to other Catholic Schools.

Lead: Mary Ellen Jordan

Team: Mary Kay Frazier, Members of the Faculty

Measures: Measures are in place and grades are in top 10%

4.2 Plan for and Establish State of the Art School Facilities

- Identify space requirements based on one room per class.
- Identify space that is excess to school needs and can be used for other parish or revenue needs. The maintenance and utility for the excess space should not be charged as a school expense.
- Report all space excess to school needs to the Pastor.
- Develop a plan to modernize the school plant
- Upgrade classrooms to state of the art learning environments.

4.2.1 Determine the Correct Size of the School Plant Based on One Room Per Class.

Based on one room per class, identify the required operational space requirements for the school. In addition identify space that can be declared excess to the needs of the school and identified for other uses of the parish, possible income generation from outside rentals, or as an area to be secured. The team will identify:

- Space required for school operations.
- Excess space that is not required for school operations
- Space requirements and excess space configured to allow a block, blocks, or a wing of the school to be secured and closed off from school operations.

Lead: Mary Ellen Jordan

Team: School Leadership Team, Don Mays and George Cruz

Measures: Space excess to the school is identified and secured from school operations.

4.2.2 Establish a Plan to Modernize the School Plant

Identify the backlog of maintenance for the reconfigured space and establish a 5 year plan to eliminate the backlog. School facilities will be upgraded with new energy efficient windows and exterior doors, lighting and colors to enhance learning, and repairs to plant HVAC and building infrastructure resulting in a well maintained facility.

Lead: Mary Ellen Jordan

Team: School Leadership Team, Don Mays, and George Cruz

Measures: Plan is completed.

4.2.3 Upgrade Classrooms to State of the Art Facilities – 2011 to 2015

All classrooms and laboratories will be state of the art (e.g. smart boards, internet access, wireless Internet capability, built-in ceiling computer projectors, etc.).

Labs will be state of the art based on school administration criteria.

- Design a state of the art classroom
- Develop a plan to identify what specifically must be done to each classroom to become state of the art.
- Establish a five year plan to upgrade all classrooms by 2015
Lead: Mary Ellen Jordan
Team: School leadership Team and Faculty
Measures: Plan is completed

4.2.4 Obtain Funding for State of the Art Facilities - 2009/2010

- Research and obtain grants in support of financial aid/assistance and for special projects to improve the academic environment of the school.
- Review possible use of the Endowment Fund as a source of funding
- Explore other possible sources of funding to upgrade the classroom learning environment
- Explore the inclusion of SJCS as a participant in the Combined Federal Campaign
Lead: Financial Freedom Team
Team: Grant Writer (Mary Kay Gibbons); Endowment Fund Oversight Group
Measures: Dollars are available to begin work on upgrading classrooms.

Strategic Key Measures of Performance

Strategic Measures:

Track progress on the Goals being worked on during current year

Long Range Goal # 1 – By the year 2015, the K-8 enrollment will be maintained at 30 students per grade for grades 1-8 and 25 students for Kindergarten, for a total enrollment of 265 students.

Lead: School Administrator

Team: School Leadership Team (SLT)

Measures: Number of Students per grade (K-8)

Long Range Goal #2 - By 2015 St. Jude Catholic School will be self-sustaining financially, with tuition revenue, financial aid, endowment support, and fund raising meeting all salary and daily operational requirements.

Lead: School Administrator

Team: Rich Harrington, Mary Kay Frazier, Vince Arendes

Measures: Income minus expenses (reported monthly)

Long Range Goal #3 – Between 2009 and 2015 St. Jude Catholic School will continue to meet all requirements and criteria set forth by the May 21, 2009 draft “Proposed Policies for Catholic Schools 2009”

Lead: School Administration

Team: SJCS Religion Faculty and member of Rectorry

Measures: Archdiocesan annual review

Long Range Goal #4: By 2015 St. Jude Catholic School will achieve Archdiocesan academic excellence requirements, through academic testing, benchmark comparisons, and state of the art facilities.

Lead: Mary Ellen Jordan

Team: School administration and faculty

Measures: Varies by goal

Operational Key Measures of Performance

Operational Measures:

- Academic Performance
 - Terra Nova Scores for 7th Grades
 - Terra Nova Scores for 4th Grades
 - 8th Grade Acceptance Rate at Catholic High Schools (Percent accepted based on number who apply)

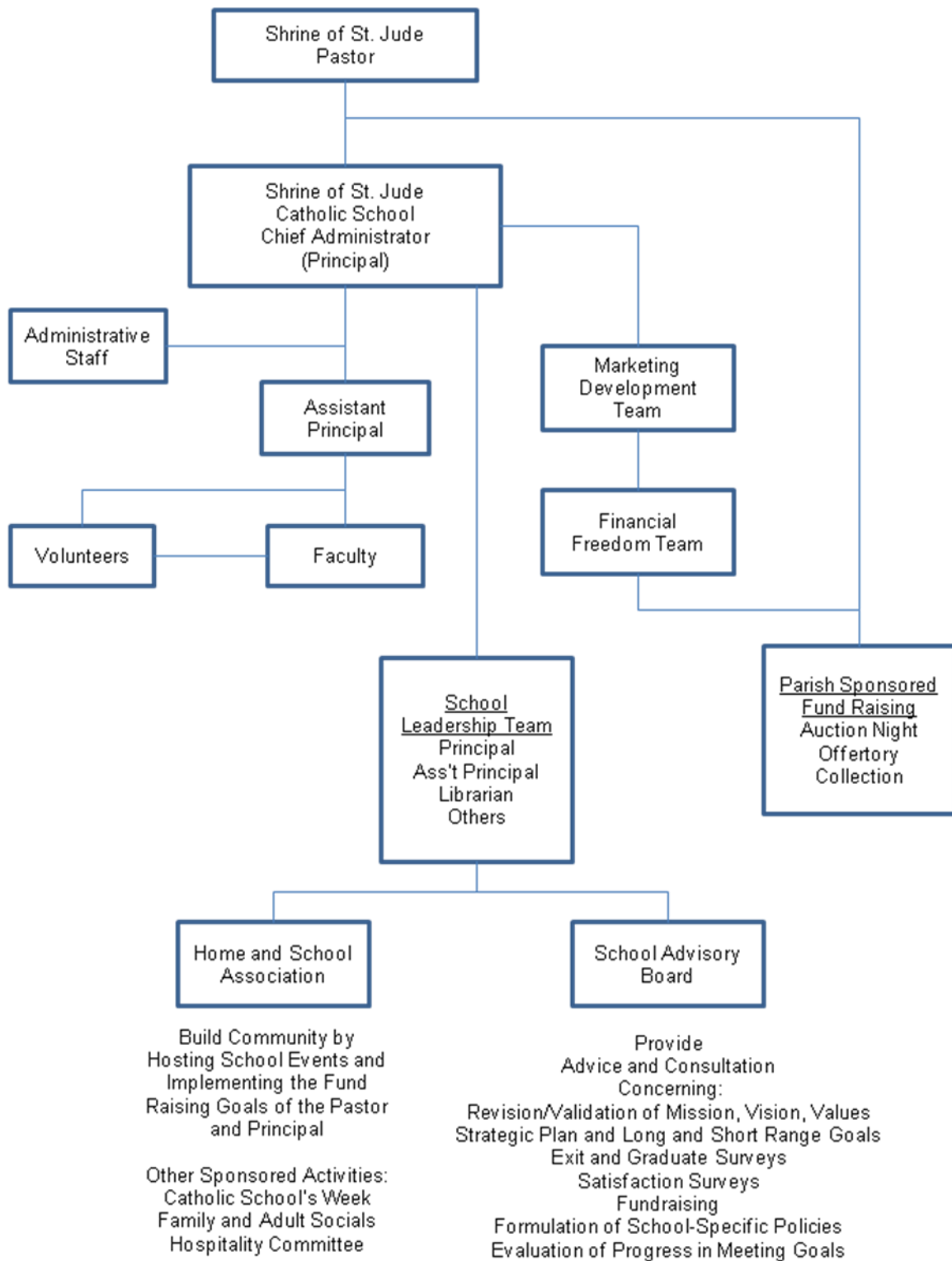
- Enrollment K-8 - Tracked Monthly
 - Total number of students as a percent of the total capacity of the school
 - Number of student enrolled by grade
 - Overall trends over the past 5 years

- Financial - Tracked Monthly and Trends over past five years
 - Total expenses per student
 - Total income per student
 - Income exclusive of tuition

- Parent/faculty/students survey results - Tracked Annually
 - Trends in satisfaction levels by each survey statement.

- Open House - Tracked by each Open House
 - Number attending
 - Number registering

- 8th Grade Parent Survey
 - Would you recommend St. Jude Catholic School to a neighbor or friend? (Percent indicating "Yes")



**St. Jude Catholic School
Organizational Alignment Chart**