

# **Presentation of Draft Recommendations**

**Catholic Schools in  
Bradford, Lycoming, Monroe  
and Pike Counties**

**Presentation to Local Leaders  
January 18, 2007**



**Diocese of Scranton**

**Strategic Plan for Catholic Schools  
Diocese of Scranton**

**Report Outline *(Draft 11/6/06)***

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- III. Catholic Identity and Mission
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# I. INTRODUCTION

Catholic schools in the Diocese of Scranton have a long and successful history. Through the years they have educated generations of young people to be faith-filled contributors to church and society and have provided “an education that no other school can supply—excellent academics imparted in the context of Catholic teaching and practice.”<sup>1</sup>

In the 2005-2006 school year, the diocese had 16 parish elementary schools, 24 interparochial elementary schools and 8 diocesan high schools serving just over 11,300 students in grades PreK through 12. As is the case in many areas of the country, Catholic schools in the Diocese of Scranton are facing many challenges: declining enrollment, rising costs, increased competition, aging facilities and diminished financial resources. These challenges are best addressed through strategic planning. In 2005, the Diocese of Scranton initiated a comprehensive diocesan-wide strategic planning process for Catholic elementary and high schools to ensure that Catholic schools in the diocese remain healthy and are able to fulfill their mission in the future. The firm of Meitler Consultants was hired to work with the diocese to develop this plan.

The planning process that was followed worked to accomplish these objectives:

1. To ensure that Catholic schools in the Diocese of Scranton will be vital, viable and able to accomplish their mission now and in the future.
2. To articulate a vision for Catholic schools that looks to the next decade and beyond.
3. To evaluate present and projected demographic trends that affect Catholic schools.
4. To evaluate whether new structures or new models are needed for delivering Catholic school education.
5. To analyze historical enrollment trends and evaluate future enrollment potential in schools that are or will experience significant changes.
6. To evaluate the number, capacity and location of Catholic schools needed in future years.
7. To evaluate the funding model supporting Catholic schools and make recommendations to strengthen their financial situation for the long term.
8. To involve key stakeholders to build broad ownership for the plan and improve and raise the potential for successful implementation.

To facilitate the collection, organization and analysis of data, the study area of the diocese was grouped into four geographic areas: Lackawanna and Wayne Counties, Luzerne County, Bradford and Lycoming Counties, and Monroe and Pike Counties. A Task Force was formed which assisted the consultants in interpreting data, providing an initial critique of recommendations from the consultants, reviewing feedback from the broader community and facilitating communication. Each local school was asked to identify key school and parish leaders to form the school’s local consultative group along with the pastor and principal. Regular meetings were held with the Task Force and periodic meetings were held with the local consultative groups to present data and proposed recommendations and to request feedback. The proposed vision statement and recommendations were revised based on this feedback.

<sup>1</sup> *United States Conference of Catholic Bishops*, “Renewing Our Commitment to Catholic Elementary and Secondary Schools in the Third Millennium”, 2005.

The process for developing the strategic plan entailed extensive data collection, visits with pastors, principals and local lay leaders, site visits to each school, meetings of local consultative groups and the involvement of numerous individuals and groups throughout the diocese. The following is a list of key steps taken in the planning process. They are not presented in exact order of execution.

- Announcement/introduction of planning process to pastors and principals
- Consultative groups formed at each local school
- Introduction and overview of planning process to all local consultative groups
- Site visits by consulting team to all Catholic schools. Interviews with pastors and principals.
- Interviews with county planning offices
- Extensive data collection and analysis
- Review of data by Task Force and identification of key findings
- Situation analysis completed by local schools based on Data Report
- Phone survey conducted of families who withdrew from elementary schools in Lackawanna and Luzerne Counties over the last two school years
- Key findings and vision presented to pastors, principals and local consultative groups in each county
- Process for discussion and feedback on key findings and vision
- Formulation of proposed recommendations by Meitler Consultants and review by Task Force
- Presentation of proposed recommendations to pastors, principals and local consultative groups in each county
- Process for consultation and feedback on the proposed recommendations
- Review of feedback by Task Force and revision of the plan as necessary
- Regular consultation with Bishop Martino, Bishop Dougherty and diocesan leaders
- Submission of structure and governance portion of plan to Bishop Martino for approval
- Submission of remaining portions of the plan to Bishop Martino for approval

With much thought and prayer and through the hard work of many people, this plan is presented to the Diocese of Scranton. Leaders of Catholic schools at all levels should use this strategic plan to guide their decision making, policy setting, and local planning, so that Catholic schools not only survive but thrive in the future and continue to make a significant contribution to the well being of the Church and the world.

## II. VISION FOR CATHOLIC SCHOOLS IN THE DIOCESE OF SCRANTON

As *The Catholic School on the Threshold of the Third Millennium* reminds us, “We must respond to 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.”<sup>{1}</sup> In forming a strategic plan for the future health and vitality of Catholic schools in the Diocese of Scranton, we are responding to the current challenges facing our schools with faith and determination. The vision that follows articulates what we believe are important key characteristics of strong and vibrant Catholic schools in the 21<sup>st</sup> century.

The purpose of the strategic plan is to realize this vision at the diocesan, regional and school level for all Catholic schools in the Diocese of Scranton. As a result of successful implementation of the Strategic Plan for Catholic Schools in the Diocese of Scranton, we envision the following in 2010 and beyond:

### Characteristics of Distinctly Catholic Schools

1. Catholic schools are recognized as an important mission and responsibility throughout the Diocese of Scranton.
2. A clear statement of its Catholic mission guides each school. The entire school community is aware of it and works to carry it out.
3. Opportunities for prayer, worship, liturgical experiences and service enhance the faith-life of each school community.
4. Students and staff integrate faith with daily living resulting in a true community of faith.
5. Gospel teachings and faith values are integrated throughout the curriculum and are evident in all aspects of school life.
6. Graduates know, understand and are able to articulate the beliefs of the Catholic faith and make decisions based on Catholic values and moral principles.
7. Each school is an effective vehicle of evangelization for students and families.
8. Each school works in collaboration with the parishes that sponsor it for quality religious formation, sacramental preparation and support of the family. The school actively encourages Catholic school parents, students, and staff to be involved in their parishes.
9. Area clergy are visible and active in their support for the mission and ministry of Catholic schools.

## **Characteristics of Academically Excellent Catholic Schools**

1. Parents are valued and involved as partners in the religious and academic education of their children.
2. School leadership is visionary, skilled, professionally competent and deeply rooted in the Catholic faith.
3. Students are taught by excellent qualified teachers committed to the mission of the school.
4. Administration and faculty are committed to continuous improvement in the teaching/ learning process.
5. Each school provides a comprehensive program to educate the whole child with particular strategies to ensure the success of at-risk students.
6. Each school is fully accredited and recognized in the community as an academically strong institution providing a superior level of education. This is verified by objective measures of student achievement.
7. Up-to-date technology and educational resources are used effectively to enhance learning in an integrated manner throughout the curriculum.
8. A comprehensive strategic plan is in place which is being implemented and updated regularly.
9. Students acquire a desire for life-long learning.

## **Characteristics of Fiscally Sound Catholic Schools**

1. Catholic schools are affordable and accessible for parents and parishes.
2. Each school has near capacity enrollment based on 25 students per section.
3. Each school has an effective marketing, recruitment and retention plan in place which is supported by coordinated efforts at the regional and diocesan level.
4. Each Catholic school provides just compensation and benefits for employees.
5. Each Catholic school follows ethical principles in its business activities and follows generally accepted accrual-based accounting practices. Each school adheres to diocesan policies regarding financial accounting.
6. Each Catholic school facility is safe, attractive and in good repair.

{1} *United States Conference of Catholic Bishops*, “Renewing Our Commitment to Catholic Elementary and Secondary Schools in the Third Millennium”, 2005.

## **V. SCHOOL GOVERNANCE AND LEADERSHIP**

### **A. Governance Model – System Model (Board of Limited Jurisdiction)**

#### *Overview*

#### **MEMBERS OF THE CORPORATION**

Create four membership corporations with reserved powers (Lackawanna/Wayne County System, Luzerne County System, Lycoming County System and Monroe County System). The recommended members are the Bishop of the Diocese, the Diocesan Superintendent of Schools, the Vicar General, an Episcopal Vicar for the county and the Chief Financial Officer of the diocese. Reserved powers related to religious education and temporal administration as required by Canon Law are reserved to this member board. Other reserved powers may be added to guarantee compliance with diocesan policies.

#### **SUGGESTED DUTIES AND RESERVED POWERS OF MEMBERS**

- Ensure that schools are operated as Catholic schools.
- Articulate the mission statement.
- Approve any acquisition, sale, lease or encumbrance of property by the corporation.
- Approve selection of members of the board of directors and remove them if necessary.
- Amend the constitution and bylaws.
- Appoint or remove the chief administrator after recommendation from or in consultation with the Board of Directors of the particular system.
- Approve any merger or dissolution of the corporation.
- Designate the transfer of assets in the event of dissolution.
- Review operating budgets annually and approve all capital budgets and changes therein.
- Approve investment policy as set by board of directors.
- Approve opening or closing of schools or significant changes in the nature of a school.

#### **THE BOARD OF DIRECTORS (TRUSTEES)**

The Board of Directors of this corporation will be responsible for all areas of school governance except those which are the reserved powers of the members of the corporation. The Corporation will have the authority and responsibility necessary to provide and foster Catholic school education Pre-K – 12 within the system. This includes the ability to establish and implement policy (consistent with diocesan policies and guidelines and state education requirements), to regulate the finances of the Catholic schools within the system and to coordinate the administration of the schools on a system-wide basis. It is, however, a board of limited jurisdiction since certain powers are reserved to the members of the corporation.

Ownership of property and buildings continues to be held by the parishes or the diocese, whatever is currently the case.

## **SUGGESTED COMPOSITION OF BOARD OF DIRECTORS**

The Board of Directors should consist of no more than 15 members including the Diocesan Superintendent of Schools. The Chief Administrator/System Director is an ex-officio, non-voting member. The directors should include two or three members of the clergy serving in the area, and lay members who are knowledgeable of the goals and objectives of Catholic education and have some particular expertise desirable for an effective board. They should be selected for their expertise and leadership, not because they represent a particular constituency. Some but not all members should have children currently enrolled in an area Catholic school. There should not be more than two lay members who belong to the same parish.

## **DUTIES OF THE BOARD OF DIRECTORS** *(including but not limited to)*

- Serve as the governing body for the Catholic schools of the system.
- Enact and implement policies for the Catholic schools of the system in accord with the established policies of the diocese.
- Develop and implement a strategic plan for the Catholic schools of the system.
- Understand the mission, tradition and values of Catholic education and ensure the mission effectiveness of the Catholic schools of the system.
- Prepare a balanced budget for the school system and ensure that the schools operate within it.
- Ensure that the funds necessary for the operation of the school system and the maintenance of school grounds and buildings are provided.
- Provide leadership in the area of institutional advancement.
- Regularly communicate the board's concerns, plans and decisions to the members of the corporation.
- Facilitate regular communication among the schools and with the entire school community, pastors and parishes and the civic community.

## **JURIDIC PERSON**

This is a status in Canon law. To emphasize its connection to the diocese, this corporation should be a public juridic person with the Board of Directors as the canonical administrator. This requires approval and designation by the Ordinary of the Diocese.

## **ADDITIONAL WRITTEN AGREEMENTS REQUIRED**

### ***Parish Financial Support:***

Each parish will need to enter into a written agreement with the corporation to provide financial support according to whatever diocesan formula is decided upon.

### ***Use of Facilities:***

There should be a written agreement regarding use of facilities by parish and school and the rights and responsibilities of each party regarding maintenance, repairs, capital improvements, etc.

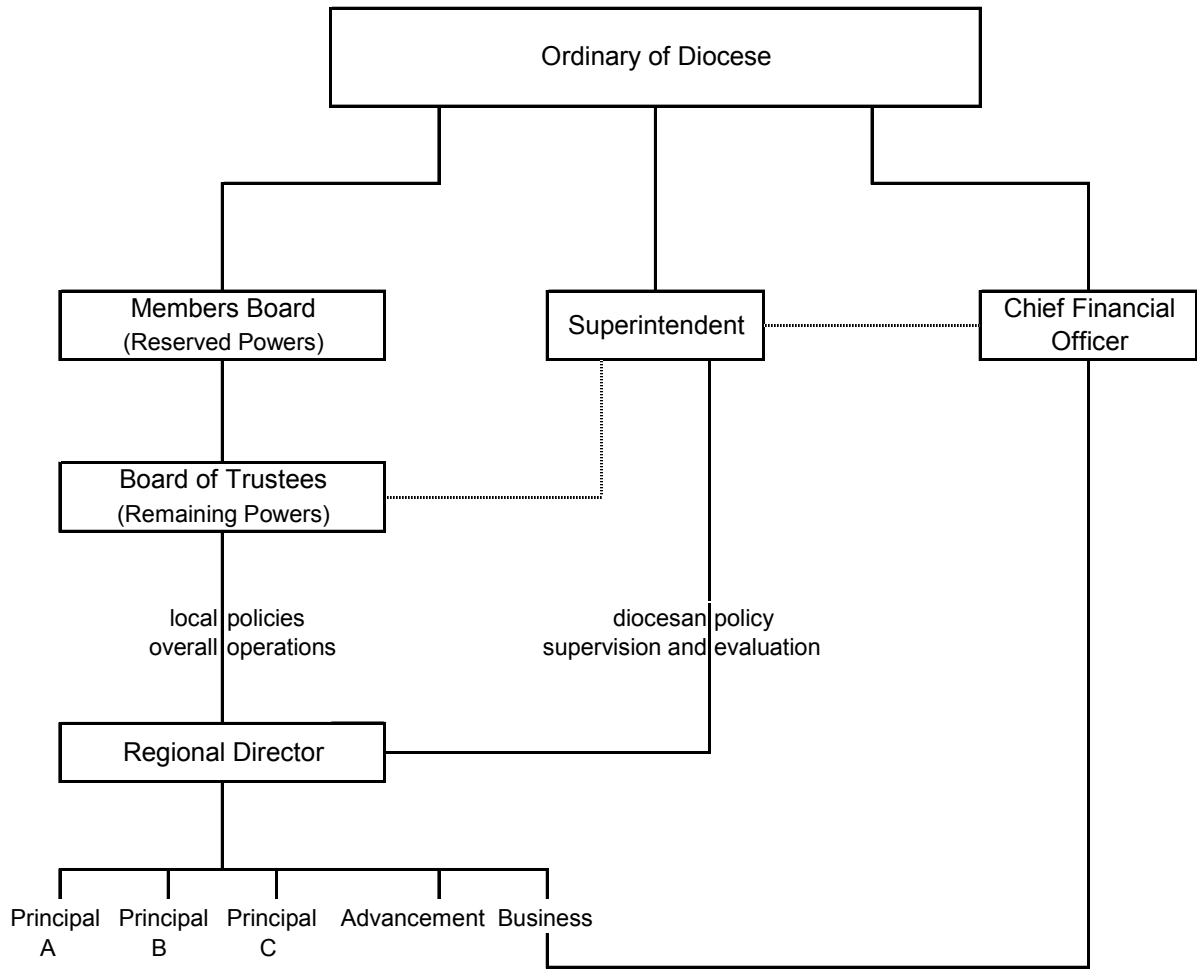
## **ADVANTAGES OF A SYSTEM**

- Governance by a board with real authority results in lay ownership, involvement and commitment.
- Enables a common standard of accountability to be established for all schools.
- Eliminates competition among schools for enrollment and dollars.
- Enables coordination of staff development.
- Enables the system to operate efficiently by facilitating decisions to expand, close or consolidate services or buildings as enrollment dictates.
- Operating fewer schools at strategic sites in the best facilities improves efficiency and lowers the cost of education, making it more affordable for parents and parishes and freeing dollars for program improvement.
- More equitable distribution of personnel, technology and other resources is possible.
- Consistent financial reporting is facilitated.
- Tuition assistance is funded and administered centrally on behalf of all parishes in the region.
- Resources of multiple parishes are brought together to sustain quality programs.
- Parishes with and without schools have an investment in Catholic education. All area parishioners have access to Catholic schools no matter what parish they belong to.
- All Catholic families pay the same tuition rates and have the same access to tuition assistance monies no matter which parish they are members of.
- If a school building is closed, the commitment of that parish to Catholic school education remains because they are part of a larger system of schools.
- Parishes contribute financially depending upon their ability to pay rather than on the number of students enrolled increasing the likelihood of more parishes encouraging families to enroll.
- There is greater consistency and control over the quality of the educational programs. All schools operate with a common curriculum and common academic standards. This does not mean, however, that all schools must be exactly alike.
- It is possible for a system to serve special needs students in a way that individual schools cannot afford.
- Efficiency and effectiveness in marketing programs, development programs, staffing and procurement of resources is gained.
- Pastors can concentrate on being spiritual leaders rather than the chief financial officers of school.

## **CHALLENGES OF IMPLEMENTING A SYSTEM**

- It is difficult for schools with a long parish history to be given a new identity within a new system. It is difficult for the local parish school to give up some autonomy and act like part of the system. There can be parochial resistance to transfer control to a new untested entity.
- Schools in a system need to be allowed to develop their own identities and a measure of uniqueness. They need to reach for excellence without being held back by the system.
- Systems often struggle to maintain parish ownership at the same level as parish schools. Parishes sometimes feel that the schools are no longer their direct responsibility. They may feel freed from involvement and responsibility. Steps to counteract this tendency must be put in place.
- Efforts are needed to inspire the commitment of the local community to a school system and the concept of our schools rather than my school.
- System schools must work at fostering connections between the parishes and the school community and engaging school families in parish life as an expected part of being in the school.
- It is time consuming and difficult to achieve common direction, strategies and policies when schools have operated independently.
- Attention must be given to the selection and training of an effective board.
- There are often hidden costs that have been absorbed by the parish which are difficult to identify for the initial system budget.
- Current development and fundraising efforts are sometimes difficult to maintain in the transition.

**School System Governance Diagram**  
**Limited Jurisdiction**



## VI. SCHOOL ORGANIZATION

### C. Recommendations Regarding School Redesign in Bradford County (Region 3)

*DRAFT December 20, 2006*

1. **Epiphany School, Sayre and St. Agnes School, Towanda will become PreK-6 elementary schools discontinuing grades 7 and 8.**

#### *Rationale*

- These schools lose students from grades 6 to 7 in part because few of them will attend Catholic high school.
  - Epiphany School has a total of 18 students in grades 7 and 8.
  - St. Agnes School has a total of 10 students in grades 7 and 8.
2. **Bring both schools into the Lackawanna and Wayne Counties System. Establish a Bradford County Ad Hoc Committee to work specifically with the administration of the two schools to develop and implement a strategic plan to increase enrollment and stabilize finances.**
    - 2.1 Committee membership should be both clergy and lay persons with knowledge, commitment and appropriate expertise.
    - 2.2 The Committee will report to the combined Counties Board but Committee members will be from Bradford County and need not be members of the Board.

#### *Rationale*

- Utilizes the expertise of both clergy and laity in shared decision-making.
  - Provides greater opportunity and resources for effective marketing.
3. **Develop a strategic plan for each school which includes specific enrollment and financial goals.**
    - 3.1 Promote and energetically market each of these schools.
      - Conduct exit interviews with families who withdraw students to assist in the development and implementation of strategies to increase recruitment and retention.
      - Develop specific marketing strategies for Epiphany School to attract the potential pool of additional students from the Waverly, New York area and the children of medical clinic personnel in Sayre.
      - Explore the feasibility of providing transportation to St. Agnes School from areas of Sullivan County to attract additional students.
    - 3.2 Monitor progress toward these goals over the next two years.
    - 3.3 If enrollment in a school does not appear to be increasing to an average of 20 per class in grades K, 1 and 2, the school should close.

### ***Rationale – Epiphany School***

- Epiphany School has a good facility and is in a good location.
- PreK was added at Epiphany School in 2006 and has 9 enrolled in the class.
- There is no other Catholic school in the Sayre area. The school has the potential to draw students from over the border in New York State where there is no Catholic school and from the nearby medical clinic.
- There is a slight increase in baptisms in the parish.
- There are indications that people are being attracted to the parish with its new leadership.
- 64% of the enrollment in 2005-06 came from Epiphany Parish.
- School subsidy from Epiphany Parish was equal to 57% of the parish offertory in 2004-05.
- Enrollment in grades K through 8 is 102 students.

### ***Rationale – St. Agnes School***

- There is no other Catholic school in the Towanda area.
- Most of the enrollment comes from SS Peter and Paul Parish.
- The public school is consolidating due to decreased enrollment.
- Some of the enrollment loss since 2002 is attributed to administrative issues.
- The school draws enrollment from the Wyalusing and Troy areas.
- School subsidy from SS Peter and Paul Parish was equal to 34% of the parish offertory income in 2004-05.
- Enrollment in grades K through 8 is 105 students.

## **4. All parishes in Bradford County will support these schools according to a consistent formula based on parish income and utilizing a sliding scale.**

### ***Rationale***

- Provides a more equitable financial structure for parishes and schools.

## **D. Recommendations Regarding School Redesign in Lycoming County (Region 3)**

*DRAFT December 20, 2006*

- 1. Maintain and strengthen the current St. John Neumann PreK-12 system and implement the strategic plan developed in 2005-06.**
  - 1.1 Closely monitor the enrollment and finances of the system to see if further adjustments are needed and to ensure that enrollment supports the provision of a quality program, especially in grades 7 to 12.
  - 1.2 Implement a comprehensive public relations and marketing plan to promote the advantages, success and stability of the new system.
  - 1.3 Provide diocesan oversight of the accounting function for the system.
  - 1.4 The system should be established as a public juridic person and a separate civil corporation.

### ***Rationale***

- The school in Williamsport successfully underwent a major reorganization for the 2006-07 school year and has begun to implement a three-year strategic plan.
  - There is an active finance committee of businessmen who have been empowered by the pastors to oversee the budget and finances.
  - Enrollment remained healthy after the restructuring.
  - There are no other Catholic schools in Lycoming County.
  - Significant development efforts have already been initiated.
- 2. Establish a board of limited jurisdiction comprised of clergy and lay leaders to govern the system and provide leadership for strategic planning development efforts and marketing.**
    - 2.1 The board will work closely with BLOCS and the Eck Foundation to secure grants for tuition assistance, academic programs and resources, and facilities improvement.
    - 2.2 The board will monitor implementation and progress of the strategic plan and update the plan as needed.
    - 2.3 The board will have direct accountability to the Diocese of Scranton and indirect accountability to the sponsoring parishes.
    - 2.4 A process for selection of board members and terms of service will be established in the bylaws.
    - 2.5 The board will have direct responsibility in the areas of planning, finance, policy development, public relations, marketing and institutional advancement. Authority in limited areas such as mission and budget approval is reserved to diocesan authority.
    - 2.6 The Board must work collaboratively with the Eck Foundation and BLOCS of Lycoming County in its development efforts.

### ***Rationale***

- Utilizes the expertise of both clergy and laity in shared decision-making.
- Provides for greater continuity in the face of future pastoral changes and fewer priests.
- Frees pastors from some administrative responsibilities.

**3. Consider the feasibility of locating St. John Neumann Regional Schools in Williamsport on a single site or two sites geographically close to each other in the near future.**

- 3.1 Explore the feasibility of adding a middle school wing which would allow the present intermediate building to become a primary campus.
- 3.2 Maintain early childhood centers at appropriate locations to serve the needs of families and act as feeder schools to the elementary school.
- 3.3 The primary campus in Bastrass which presently houses grades PK to 3 should be maintained to ensure the presence of Catholic education to the population of that area which is twelve miles west of Williamsport.
- 3.4 The new governing board should evaluate implementation of the current three-year plan and begin to develop a plan for the following five years.

***Rationale***

- The proximity will provide benefits to the program and students at the middle school level and should reduce utility and maintenance costs.
- Students in primary, middle and upper grades from the same family will be located in the same geographic area.

## **E. Recommendations Regarding School Redesign in Monroe County (Region 1)**

*DRAFT December 1, 2006*

### **OBSERVATIONS ABOUT MSGR. MCHUGH ELEMENTARY SCHOOL**

1. There are 6,200 registered households among the 7 parishes supporting Msgr. McHugh School.
2. Supporting parishes baptized 145 infants in 2004, down from 212 in 1999.
3. Supporting parishes have 1,100 students in their religious education programs.
4. Enrollment declined from 466 in 2001-02 to 330 in 2006-07, a decline of 25%.
5. Attrition from grade to grade is a major concern for Msgr. McHugh School. Losses were ↓31, ↓86, ↓40, ↓25 in the years 2003 to 2006. 2006-07 enrollment appears to be an improvement over recent years.
6. Msgr. McHugh School is operating at 70% of capacity, with 150 empty seats.
7. Non-Catholic students comprise 15% of enrollment.
8. With a strong program, excellent reputation, good marketing/communications, and quality facilities, the school should be able to maintain full enrollment with double classes.

### **OBSERVATIONS ABOUT NOTRE DAME ELEMENTARY SCHOOL**

1. There are 8,900 registered households among the 4 parishes supporting Notre Dame Elementary School. This number appears to have grown 9% from four years prior.
2. Supporting parishes baptized 246 infants in 2004. While the number was stable for the last two years, it is down about 20% from the year 2000 and earlier, when infant baptisms were over 300.
3. Supporting parishes have 2,300 students in their religious education programs.
4. K to 8 enrollment at Notre Dame Elementary School and Middle School has remained relatively unchanged at 535 students for 2006-07. PreK enrollment has grown to 41 students.
5. There are enough children seeking Catholic education to fill a third class per grade, building from Kindergarten through 8<sup>th</sup> grade.
6. Notre Dame Elementary School has 14% enrollment from non-Catholics and the middle school has 8% enrollment from non-Catholics.

### **OBSERVATIONS ABOUT NOTRE DAME HIGH SCHOOL**

1. Enrollment at Notre Dame High School in 2006-07 is 272 students, an increase of 25 from 2000-01. There were some on the waiting list for 9<sup>th</sup> grade.
2. When classrooms in the new building are finished, Notre Dame High School could house 90 freshmen, raising enrollment capacity to between 360 to 380.

## GENERAL OBSERVATIONS

1. Monroe County had a population of 138,687 in 2000 and has an estimated population of 163,000 in 2005, an increase of over 24,000 in five years. The county is projected to grow by another 61,000 persons between 2005 and 2020, reaching a potential population of 224,000.
2. The four largest growth areas are: Chestnut Hill Township, Coolbaugh Township, Middle Smithfield Township, and Tunkhannock Township.
3. Among Catholic children enrolled in a formal Catholic education program, 17% attend Catholic schools. This is below the diocesan average of 24%.

## RECOMMENDATIONS

### **1. Bring together Msgr. McHugh Elementary School, Notre Dame Elementary School and Notre Dame Middle/High School under a single governance system with a board of limited jurisdiction responsible for PreK through 12th grade Catholic education in Monroe County.**

- 1.1 The board will have jurisdiction over many aspects of Catholic schools. There will be direct accountability to the Diocese of Scranton and indirect accountability to the sponsoring parishes.
- 1.2 Officially form the new governance structure as of July 1, 2007.
- 1.3 Board membership will be both clergy and lay persons with knowledge, commitment, and appropriate expertise. A process for selection of board members and terms of service will be established through the bylaws governing the board.
- 1.4 The Board will have responsibility for areas such as planning, finance, policy development, public relations, marketing and institutional advancement. Authority in limited areas such as mission and budget approval is reserved to diocesan authority.
- 1.5 The system will need a director.
- 1.6 The system will be established as a public juridic person in canon law and a separate corporation in civil law.
- 1.7 The system must work hard to build strong ownership for Catholic schools in sponsoring parishes and the local community.
- 1.8 Marketing, institutional advancement and planning activities will be system-wide.

### ***Rationale:***

- Allows for enhancement of programs, greater sharing of resources and better stewardship of limited funds.
- Enables better articulation and consistency of curriculum PreK to 12.
- Provides a more equitable financial structure for all involved in providing Catholic education. Helps to maintain affordability of Catholic schools for parents and parishes.
- Provides a system in which future changes related to program, enrollment and finances can be made strategically within the best interest of the region.

- Provides for greater continuity in the face of future pastoral changes, parish reconfigurations and fewer priests. Enables priests to concentrate on being the spiritual leader rather than the Chief Financial Officer of the school.
  - Moves schools from competition for resources and students to cooperation in providing affordable, quality Catholic education.
  - Provides greater opportunity and resources for effective marketing and development through coordinated, combined efforts.
  - Provides consistent policies for admission and tuition across the system.
  - Operates with a common standard of accountability. Facilitates consistent business management and financial reporting.
  - Utilizes the expertise of both clergy and laity with shared responsibility for decision-making.
  - Most schools are regional in terms of the residences of the students. A system approach reflects this reality.
- 2. Msgr. McHugh Elementary School as part of the Monroe County Catholic school system needs to make a greater investment in marketing and recruitment as well as communications with parishes and the community to shore up enrollment in the lower grades and benefit the school in many other ways.**
- 2.1 To reach full enrollment, the school will have to increase the share of children coming from supporting parishes and, more importantly, improve retention to 98% or better.
  - 2.2 Study reasons for parents leaving Msgr. McHugh School and take strategic steps to stem the outflow of students.
  - 2.3 Put a particular emphasis on marketing Pre-Kindergarten.
  - 2.4 Continue to market to families who are not Catholic. Maintain a market share outside the Catholic community long-term.
- 3. Investment needs to be made in the facilities at Msgr. McHugh Elementary School to address maintenance issues and upgrade areas for educational and marketing reasons.**
- 3.1 Develop a long-range facility plan with a budget. Set priorities and develop a capital funding plan.
  - 3.2 As part of a larger development initiative and in response to facility needs, build a case for conducting a capital fund drive. Cultivate a base of support through the work of the new board, strategic planning, communications and education in the wider community.

4. **The new governing board for Monroe County Catholic Schools should establish an ad hoc committee to study the feasibility of expanding elementary enrollment capacity in growing parts of the county and accommodate waiting lists at Notre Dame Elementary School. Possibilities to study are:**
  - Open a PreK through grade 8 school at Our Lady Queen of Peace Parish.
  - Build a new elementary school on the campus of Notre Dame Middle School and Notre Dame High School.
  - Partner with the Diocese of Allentown to provide Catholic education for students at Catholic schools in Northampton County; namely at Our Lady of Mt. Carmel School, Immaculate Conception School and Pius X High School.
  
5. **The strategic plan for Notre Dame Elementary and High School should be updated and a fresh and compelling case prepared to continue development efforts.**
  - 5.1 As pledges are paid from the latest cycle of capital fundraising, roll out an updated strategic plan as the work of a new board. Present a fresh and compelling case to complete capital projects at all levels and reduce debt.
  - 5.2 As part of the strategic plan, work to pay off debt on the new high school. As debt is reduced and funding comes available, finish high school classrooms, expand the cafeteria, convert the auditorium for fine arts, and complete the facility to accommodate a larger enrollment of 380.
  
6. **Work toward a goal of 95 freshmen for Notre Dame High School and enrollment capacity of 360 to 380.**
  - 6.1 Make an ongoing investment in marketing and public relations. Increase enrollment from Msgr. McHugh School and from Pike County. Study the feasibility of providing transportation to Pike County. Work to increase enrollment of non-Catholic students.
  - 6.2 Larger enrollment in the high school will provide new possibilities to expand educational programs and give more options to students. More enrollment will provide a stronger base of funding to support quality programs.
  - 6.3 A new elementary school in Monroe County will make a major difference in growing and sustaining high school enrollment.
  
7. **Determine the need for developing an individualized instruction program at the elementary and high school level for students in Monroe County.**
  - 7.1 This program should be patterned after the existing program in Luzerne County for students with special needs.

## **F. Recommendations in Pike County (Region 1)**

*DRAFT December 1, 2006*

As a result of reviewing past studies, current demographics and local input, the following recommendations are made.

### **RECOMMENDATIONS**

- 1. A long-range planning committee for a new Catholic elementary school should be formed in the Pike Deanery. The committee should be made up of lay people and pastors with specific expertise, vision and leadership capable of forming a plan and cultivating support for a new school. The committee should understand clearly its purpose and have accountability to the local parishes and the Office of Catholic Schools. All five parishes of the Pike Deanery should participate on the committee.**
  - Initial studies indicate the population base is growing and will be sufficient to support a Catholic elementary school.
  - The site for a new school should be central to the larger population centers with relatively convenient access to Interstate 84.
  - The new school should provide PreK through 8<sup>th</sup> grade. Younger grades should be opened first to provide a reliable feeder for enrollment to the upper grades.
- 2. The initial work of the long-range planning committee for a new school should be:**
  - Formulate a mission and overall vision for a new school
  - Validate the grade structure
  - Define the niche the school will fulfill in the educational marketplace and identify the type and scope of programs the school will offer
  - Validate data in past studies and formulate an enrollment projection
  - When preliminary steps are completed, conduct a survey of potential parents to determine real enrollment potential
  - Determine the overall design and all costs associated with acquiring land, construction and start-up of a new school
  - Form a plan and timeline for raising capital funds
  - Work collaboratively with Deanery parishes to educate the Catholic community and build ownership for the mission of a new school
  - With guidance from the Office of Catholic Schools, determine the type of governance structure under which the school would eventually operate
- 3. The Diocese of Scranton in concert with the parishes of the Pike Deanery should consider the purchase of property for a possible school site as soon as a more thorough study of sites can be completed. The property should be large enough to support a school with an enrollment of 500, and provide space for further expansion if it should ever be necessary. This is likely to be the only school in Pike County long term. The property can be purchased as an investment of the Diocese and parishes until a feasible plan for a new school is accepted and funded.**
- 4. The parishes and the Diocese should work together to form a capital funding plan.**
- 5. If a new school is built, a decision should be made as to whether it should be part of another system or be governed under its own board of limited jurisdiction.**



## **Signs of Catholic School Viability Key Objectives**

### **I. Catholic Character**

- 1.1 An appropriate mission statement reflects the Catholicity of all school programs and activities.**
- 1.2 A fully developed religion program having qualified teachers is in place. The teachings of the Catholic Church are integrated across the curriculum.**
- 1.3 Parents and their children are expected to attend Mass regularly and participate in parish life.**
- 1.4 The Catholic identity of the school is clearly manifested through the leadership of the principal. Faculty and students observe the truths of the Catholic faith through regular participation in Mass and the Sacraments. Daily prayer, service projects, and personal growth opportunities further enhance the spiritual element in their lives.**
- 1.5 The school is perceived as a vital ministry of the parish(es). The parish(es) support the school through interest, involvement and subsidies.**

### **II. Academic Program**

- 2.1 The school is fully accredited by the Middle States Association. The school offers a marketable academic program that is competitive with other schools (non catholic) in the area.**
- 2.2 The superior quality of the academic program is comprehensive in scope to include art, music, technology, languages, and physical education programs.**
- 2.3 Technology is up to date and incorporated throughout the curriculum.**
- 2.4 Teachers are appropriately degreed, qualified, and competent for their respective courses. Religion teachers are practicing Catholics, and, except for unusual circumstances, all faculty members are practicing Catholics. All faculty members have appropriate state and religious education certification. Teachers participate in professional development programs.**
- 2.5 The student/teacher ratio is cost effective and provides sufficient staff for a positive learning environment. The average number of students per homeroom is 25. The maximum number is ordinarily 30.**
- 2.6 The school provides for the needs of the students on all levels of learning. The annual Diocesan standardized testing program is analyzed to assure that the school is providing a quality academic program for its students.**
- 2.7 The curriculum is aligned with Diocesan and state standards and is assessed and updated on a regular cycle. Textbooks, technology, and resources are reviewed and assessed annually to maintain a quality academic program.**
- 2.8 Professional and spiritual development programs are in place and full participation is required, for example, through the Pastoral Formation Institute, Christian Formation Days and others.**

### **III. Physical Condition**

- 3.1 The school facilities provide space for extra curricular programs, especially for students in sixth through eighth grades. Facilities are attractive, sufficient and appropriate to provide quality educational programs, including library, gymnasium, multi-purpose room, computer/science labs (internet access), and playground areas. High school facilities also include adequate parking for faculty and students as well as maintain appropriate athletic fields.
- 3.2 A five-year plan is an appropriate time frame for maintenance and capital improvements. A funding plan is established for capital projects.
- 3.3 The property and facilities are attractive, safe and clean, conducive to the learning experience. The school should be well-lit, and ventilated (heating and cooling).
- 3.4 The utilization of space is reasonable in terms of finances and programs.

### **IV. Enrollment and Growth**

- 4.1 An enrollment constituting one class per grade (K-8) is maintained (approximately 225 students) to be cost effective. All schools should operate at 90% or better of their capacity. For K-6 programs (approximately 175 students) is anticipated to be cost effective. (*High school enrollment will be determined at a later date.*)
- 4.2 Enrollment in Pre-Kindergarten program will be reported separately due to the various styles of the program.
- 4.3 Enrollment trends and demographic data demonstrate the number of students that can be maintained or increased in the geographic area served by the school. Parish(es) baptismal records are continually monitored to assess the long range viability of the school.
- 4.4 The school, in conjunction with the Diocese, has effective marketing, recruitment, and retention programs.

### **V. Financial Condition**

- 5.1 The parish(es) and parents show evidence of a willingness to support the school financially. The support is dependable.
- 5.2 Revenue from all sources (subsidy, tuition, fundraising) is sufficient to achieve a balanced operating budget. The school maintains a balanced budget (including 10% of total operating budget annually placed in reserve).
- 5.3 Local resources of funding are available for tuition assistance in addition to the EITC and diocesan funds.
- 5.4 The school has established long range financial planning to include the establishment of endowment funds, alumni support, grant requests, and corporate sponsorships.
- 5.5 The salaries of lay faculty are sufficient to attract and retain qualified teachers. The school is able to hire a sufficient number of faculty members who are qualified and willing to serve in a Catholic school. Salaries and benefits are within Diocesan guidelines. Salaries are increased annually.
- 5.6 A tuition formula includes a family plan in both the elementary school and the high school throughout the PK-12 program.

- 5.7 The Pre-Kindergarten is self supporting and makes a positive financial contribution to the school's operating budget.

## **VI. Leadership**

- 6.1 The principal, pastor(s) and lay/religious faculty provide the leadership necessary for the viability of the school.
- 6.2 The school has a strategic plan and it is reviewed and updated annually; successful implementation is evident.
- 6.3 An active school governance board works with the principal and pastor(s) to maintain an active and viable school.
- 6.4 The school follows all Diocesan policies.
- 6.5 The principal is an active member of a Catholic parish and serves as the educational and spiritual leader of the school.
- 6.6 The school has the appropriate administrative staff necessary to maintain a quality and viable Catholic school, encompassing these areas: religion, academic/curriculum, guidance, co-curricular, development, marketing, and others that may be particular to a school and as stated in the Diocesan governance policy.