

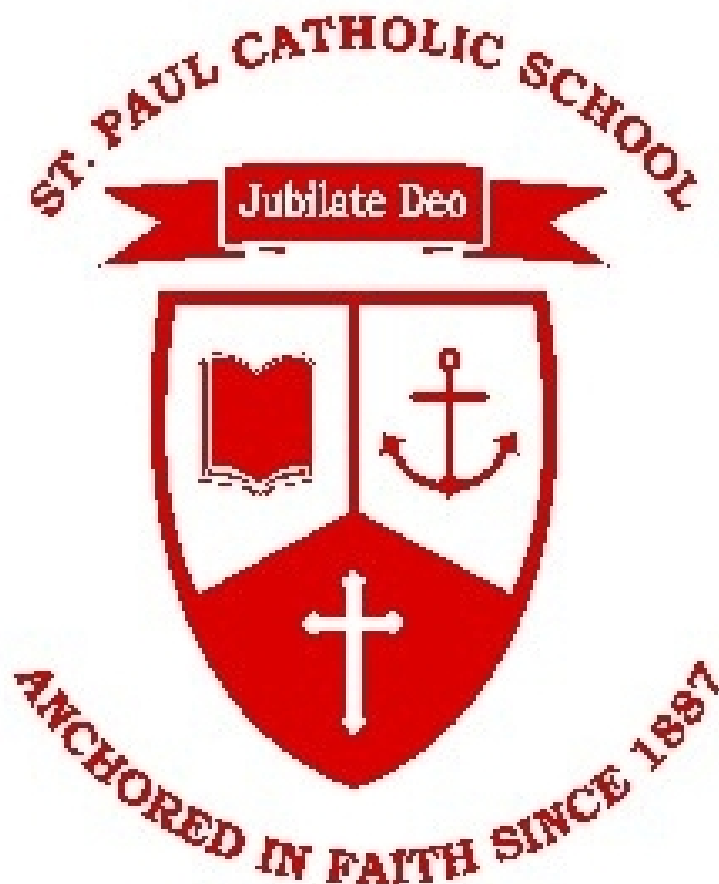
# ST. PAUL CATHOLIC SCHOOL

## STRATEGIC PLAN

Prepared by

The St. Paul Catholic School Committee

2005-2006 School Year



Reverend Patrick F. Halfpenny, Pastor  
Mrs. Mary H. Miller, Ed.S., Principal

**St. Paul Catholic School  
Strategic Plan**

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**St. Paul on the Lake  
Catholic Church and School**

**Parish Mission Statement**

St. Paul on the Lake is a vibrant Catholic Church with a strong foundation rooted in history, tradition and faith. Guided by Christ's love, Sacred Scripture and the Sacraments, we seek to provide an environment for worship and spiritual growth. Through our stewardship and the promotion of our Catholic beliefs, we will reach out as Christ's disciples in service to others.

**School Mission Statement\***

The mission of St. Paul Catholic School, in partnership with parents and the parish community, is to continue the teaching ministry of Jesus Christ. The goal of the school is to enable each child to develop his/her full potential – spiritually, intellectually, emotionally, physically, and socially – so that each child will be prepared to meet the challenges of living a Christian life now and in the future.

## **St. Paul Catholic School Strategic Plan Summary**

### **Background**

In August 2005, Sr. Mary Gehringer, Superintendent of Schools – Archdiocese of Detroit, met with the members of the St. Paul Catholic School Committee and Mrs. Mary Miller, Principal. The purpose of the meeting was to review the Catholic School Committee's roles and responsibilities as viewed by the Archdiocese. St. Paul Catholic School Committee shared its past practices and responsibilities. St. Paul School Committee met most of the Archdiocesan expectations of a Catholic school committee but did not have a strategic planning process for the school in place. The Archdiocese of Detroit views strategic planning as perhaps the most important purpose of its Catholic school committees.

In September 2005, the School Committee considered its goals for the year and determined that many of them fell within four broad categories: curriculum planning, the deteriorating condition of the school buildings, maintaining reasonable tuition and costs, and increasing marketing efforts to improve enrollment. The School Committee determined that these four areas were significant to the success of the school and should be the driving force behind the strategic plan.

The School Committee met with the pastor, Monsignor Patrick F. Halfpenny, to discuss the strategic planning process and obtain his guidance. At his suggestion, the Committee invited Mr. Blair Simmons, of the Finance & Administration Commission (F&A), and Mr. Patrick J. Haddad, also F&A member and charged with developing a long range financial plan for the parish, to their October and November, 2005, committee meetings to discuss the strategic planning process and its goals. These meetings, coupled with numerous meetings with the principal and the parish business manager, Ms. Andrea Hoeflein, provided the foundation for the school's strategic plan. In the intervening months, the Committee members spent many hours with the parish staff and subject matter experts to develop a sound strategic plan for the school.

### **School Committee Vision**

The St. Paul Catholic School Committee's primary goal is to support and advance the mission of the school. The School Committee represents the families, students and staff of the school before the pastor, parish, Education Commission and the school administration. Their efforts ensure an environment in the school where Catholic values and high academic standards are paramount.

### **Strategic Focus Areas**

The St. Paul School Committee has undertaken a lengthy and well-researched process to develop strategic plans for the school that support the mission statements for both the parish and the school. These plans focus on four primary areas:

- **Curriculum:** Provide an innovative, well-rounded curriculum which challenges the students, supports the mission of St. Paul Catholic School, and ensures the continual growth of our Catholic faith.
- **Facility:** Develop a renovated physical facility that is the premier academic facility on the eastside of the Archdiocese of Detroit where students are educated in an environment that enhances their spiritual and academic growth.
- **Financial:** Improve the financial well-being of St. Paul Catholic School to ensure its long-term viability by anticipating and planning for the school's financial needs.
- **Marketing:** Communicate the value and strength of a Catholic education within and outside the school community, and develop the "St. Paul brand."

This strategic plan has been reviewed and approved by the School Committee with input from key stakeholders as indicated in each of the plans. They have also been approved by the principal and the parish business manager.

The underlying work is available upon request but is not incorporated into this final document due to the length and scope of the research.

## **Next Steps**

### **June 2006 (Completed)**

- The strategic plan will be presented to the parish Education Commission for review and approval.
- Once Education Commission approval has been secured, the plan will be presented to the Pastoral Council for approval.

### **July 2006 (Completed)**

- The strategic plan will be presented to the pastor, Monsignor Patrick F. Halfpenny.
- The strategic Plan will be provided to the chair of the Finance & Administration Commission, and Mr. Patrick J. Haddad.

### **August 2006 (Completed)**

- The strategic plan will be available in the summer 2006 on the website of the school: [www.stpaulonthelake.org](http://www.stpaulonthelake.org).

### **School Year 2006 – 2007 (In Progress)**

- Tactical Plans will be developed by the School Committee to guide their work and ensure that the school's strategic plan remains a current, viable tool.

## **St. Paul Catholic School Curriculum Strategic Plan**

### **Vision**

To provide an excellent spiritual and academic curriculum that challenges the students, supports the mission of St. Paul Catholic School, and ensures the continual growth of our Catholic faith.

### **Objectives and Strategies**

#### **1. Develop a Living Curriculum, Which Can Be Reviewed and Updated On an Annual Basis as Described Below.**

The following is the timetable for the scheduled Curriculum of Studies design and review:

- 2005/2006	Math, Language Arts, Technology and Music
- 2006/2007	Religion and Art
- 2007/2008	Science and Spanish
- 2008/2009	Social Studies and Physical Education
- 2009/2010	Math and Technology
- 2010/2011	Language Arts and Music

Curriculum, broadly defined, is all the experiences that students require for full and authentic participation in the Catholic faith, society, and their own families. Children learn the curriculum as thinking individuals within a social context (the Church, community, their families, and their classrooms). St. Paul on the Lake Catholic School has defined the following aims for a full and authentic Catholic education:

#### **Graduation Statement\***

*A graduate of Catholic education at St. Paul Catholic School will:*

- Recognize that all people are children of God, created in His image.
- Have the academic skills necessary to perform successfully in high school.
- Have the life skills necessary to appropriately interact with others.
- Possess the critical thinking and problem solving skills to facilitate lifelong learning.
- Know how to be an effective communicator, in writing and in speaking.
- Use appropriate organizational and study skills.
- Know how and where to locate resources, and how to use them effectively.
- Have knowledge about the environment, and the impact of his or her actions on the environment.
- Actively participate in local and global peace and justice issues.
- Make moral and ethical choices, acting in accordance with Church teaching.
- Be active in the Church, especially by participating in weekly Sunday Eucharist.

- Be active in his or her community.
- Be a witness to his or her Faith.
- Be a good citizen of our community, our country, and our world.
- Be self-confident.
- Be able to set realistic goals, and to accomplish them.
- Be a reflective learner in both academics and Christian values.
- Be open-minded, flexible, and tolerant.
- Be kind, compassionate, responsible, and loving.
- Be family-oriented, respecting and protecting life in all its ages and stages.

In order to achieve the aims of our school, we have developed a curriculum (a set of goals and objectives) that is aligned with the nationally-normed achievement test used by the school, the Iowa Test of Basic Skills. In addition, the curriculum is aligned with the national standards developed by both the National Council of Teachers of English and the National Council of Teachers of Mathematics. The curriculum for the “Special” Classes (Art, Music, Gym, Spanish, and Library) is based upon the Michigan Grade Level Content Expectations (GLCE) for those subjects.

The full curriculum, including unit goals and objectives, is or will be available on the school website, searchable by grade level and content strand, according to the timetable identified above. A shorter summary document will also be available for parents.

## **2. Evaluate Student Performance And Test Scores.**

Students are to be given communication regarding their progress through class work, projects, homework and tests. Teachers are to use oral and written comments to explain, encourage and inform the students of their performance. Achievement is communicated through mid-quarter progress reports (grades 5-8), quarterly report cards, daily assignment notebooks, weekly teacher letters, and web-site postings. Parent-Teacher conferences will be held in November and whenever a parent, teacher or administrator believes it to be necessary.

St. Paul Catholic School has chosen to administer the complete battery of the Iowa Tests of Basic Skills (ITBS) in grades two through eight, and the Cognitive Abilities Test (CogAT) in grades one, three, five and seven. The ITBS is a standardized test. By using a standardized test, educators are able to compare results over time. Scores can be combined meaningfully to describe group performance. Thus, the school is able to reliably show growth and improvement over time. The ITBS is also a norm-referenced test, which allows a student’s results to be compared to scores obtained by a broad sampling of students in the same grade or age group. The CogAT is a group-administered ability test that assesses students’ abilities in reasoning and problem solving using verbal, quantitative and nonverbal (spatial) symbols. The results are reported as Standard Age Scores, which are developed for the purpose of comparing the rate and level of cognitive development of an individual to other students in the same age group.

In order to best determine areas of strength and make adjustments to curriculum, the teachers will look at grade equivalent and percentile rank of each subject area. Teachers receive the results of the Iowa test for their classroom, and those of the students in the grade ahead of them. The teachers will then assess the needs of their current students, examine the progress of the students they taught the previous year, and make adjustment to their teaching. After the teacher performs this analysis, there will be a grade level meeting, and then a faculty meeting to discuss the results and any changes to materials and methods for class groups. The test results will also be used as an indicator for students who may need remedial help or referral for further testing, or selecting students for advancement.

### **3. Develop And Maintain a Highly Trained Professional Staff.**

St. Paul Catholic School has a number of programs in place which develop and maintain a highly trained professional staff. New teachers participate in an orientation program, and are paired with a mentor who can provide guidance and advice. The staff meets on a monthly basis with support from curriculum specialists from the diocese. The administration encourages teachers to attend workshops and conferences on special programs and new teaching techniques and strategies throughout the year, to assist and strengthen instruction. Professional Development and Delayed Start days, which are held monthly, give teachers opportunities to interact with professional speakers and with each other.

The evaluation framework for teachers focuses on the four primary domains of teaching: planning and preparation, the classroom environment, instruction and professional responsibilities. The principal evaluates teachers both during the course of the year, which provides for self-assessment and collaborative goal-setting, as well as formally, at the end of the year. This framework offers teachers and administrations a means for communicating about excellence in teaching.

### **4. Develop Booklet Summary of Curriculum.**

The faculty will prepare a summary of the curriculum after the completion of the annual design and review process. This summary will consist of approximately one paragraph per subject, per grade. This document will be updated each year.

## **St. Paul Catholic School Facility Strategic Plan**

### **Vision**

The campus and physical plant of St. Paul Catholic School ("Facility") will be the premier academic facility of the Detroit Archdiocese, eastside. As an integral part of the St. Paul on the Lake parish, the school facility will reflect the values and principles of the Catholic faith in its décor and enhance the implementation of Catholic education within its confines. The physical plant will provide for the immediate needs of the school, eliminating marginal or unsafe conditions, while making provisions for future growth and needs. As a premier facility, St. Paul Catholic School will attract new students, retain existing students, and educate them in an environment that will enhance their spiritual and academic education.

### **Background**

The Facility is comprised of three buildings built in 1927, 1951, and 1963. Second only to the Church, the Facility is the most important physical asset of the Parish. Everybody is aware that the Facility is in need of repair and attention. Deferred repairs and improvements over the years led to the Facility's current marginal condition. To preserve the Facility for the future and to continue its mission of fostering children's Catholic education, the Facility must be updated to 21<sup>st</sup> century standards.

The Facility was inspected by the Task Force in 2003. The Task Force noted certain repairs that were needed. More importantly, it recommended the establishment of a repair and improvement process, including a building and grounds committee which would report to the Parish Finance and Administration Commission. See Attachment I for the specific Task Force recommendations.

### **Strategies**

1. Review Task Force recommendations.
2. Inventory existing space conditions on a room by room basis and identify Facility design and infrastructure conditions.
3. Recommend a list of next steps for improvements with priority assessment.
4. Propose recommendations for enhanced stewardship of Facility in terms of organization and responsibility and assess on a continuing basis the adequacy of and need for repairs and improvements to the Facility.
5. Propose recommendations for Facility safety, security, and enhanced quality of life.

### **School Committee Assessment**

The School Committee is able to see the pressing needs of the Facility on a daily basis, and wants to communicate to the Parish the concern that maintenance and repairs be made before the condition of the Facility further deteriorates to an unacceptable level. The School Committee performed an initial assessment of the Facility during the 2005 – 2006 school year in consultation with the Parish Business Manager, School administration, the teachers, and the maintenance team. See Attachment II for further details of the physical plant condition.

## 1. Strategic Plan

### School Year 2005-2006

- **Repair Flat Roof.** The maintenance team identifies the flat section of roof over the 1951 and 1963 buildings as the top priority for Facility repair. It is unacceptable that trash cans are collecting rain water within the Facility. Further deterioration of the roof will lead to increased costs and damage. Funding must be allocated now. The flat roof will be replaced during the summer of '06.
- **Exterior Doors.** The maintenance team identifies replacement of the exterior doors to school buildings as a second priority. Some of the doors cannot be properly closed to secure the building. In case of an emergency, the Facility cannot currently be locked down without chaining many doors, thereby creating a fire hazard. Funding must be allocated now. Detroit Door will provide school door assessment with replacement costs by early June.
- **Bathrooms.** Accelerate the badly needed repairs in the junior high bathrooms to improve sanitation, prevent further water damage, and prevent the spread of disease. Full funding must be allocated now. Renovation of the two junior high bathrooms in progress. To be completed by June 2006.
- **Building Committee.** A Building Committee, responsible for stewardship of the school building and grounds, needs to be established to spearhead and execute a Facility plan. This committee should consist of subject matter experts, parishioners, and school parents. This committee should report to the Finance & Administration Commission.
- **Facility Inventory.** The Building Committee representatives need to conduct a thorough Facility Inventory, with a view toward creating a top-notch facility.
- **Facility Renovation Plan.** The Building Committee needs to develop a Facility Renovation Plan based upon the Facility Inventory, walk through, and planned use. The Facility Renovation Plan should also consider improvements to school facility use and educational offerings. The Facility Renovation Plan should establish priorities, a time-line, construction management, continued education plan, and costs.
- **Facility Management Plan.** The Building Committee needs to develop a Facility Management Plan that identifies and implements improvements, identifies and secures repairs, and oversees an ongoing maintenance and prevention program.
- **Capital Campaign Consultation.** The Archdiocese requires funding in place before undertaking significant capital improvements. The Finance and Administration Commission should complete formal discussions to establish and initiate a capital campaign to renovate the Facility.

### School Year 2006-2007

- **Capital Campaign.** Initiate and complete a capital campaign for the Facility.
- **Facility Renovation Plan.** Begin renovations of the Facility in a manner least disruptive to the education process but keeping in mind that work must continue to be done during the school year.
- **Facility Management Plan.** Continue to identify and resolve pressing needs. Modify Facility Plan to reflect planned maintenance and repair of renovated facility.
- **Refine Parish Facility Maintenance.** The maintenance team is responsible for all parish buildings – three school buildings, the Parish house, Parish offices, Rectory and the Church – as well as the grounds. There are three maintenance members on site during the day. The maintenance members spend significant time setting up/tearing down for activities, turning on/off lights, opening/locking doors, to also permit time for creative maintenance and problem solving. The Building Committee needs to assess whether maintaining this work force also permits the maintenance team to address routine maintenance and repairs before they escalate to costly damage.

### School Year 2007-2008

- **Facility Renovation Plan.** Complete renovations of the Facility in a manner least disruptive to the education process but keeping in mind that work must continue to be done during the school year.
- **Facility Management Plan.** Continue to identify and resolve pressing needs. Modify Facility Plan to reflect planned maintenance and repair of renovated facility.

## **Task Force Recommendations**

[The following is a transcript of the recommendations from the Task Force report, dated 2004.]

“At the request of Bishop Blair, [a group of parishioners] assessed the Grade School physical plant.

This group recommended the following repairs to the Grade School physical plant in the short-term, in the following order of priority.

- Replace Main Entrance: The group recommends the elimination of interior partitions, installation of a drop ceiling with lights in the main corridor, and replacement of entrance doors with two sets of double doors.
- Retrofit Bathrooms and Drinking Fountains: All bathrooms require new partitions, automatic flush valves, new sinks with automatic faucets, and repainting. New drinking fountains are required throughout the school facility.
- New Lighting: New lighting fixtures are required throughout the school facility. In the long-term, replacement of the boiler, lockers, and windows will be required, as well as the kitchen refrigeration system.

The Task Force recommended that the Parish establish a process to assess on an ongoing basis the adequacy and need for repairs and improvements to the grade school physical plant. This process could include a building and grounds committee which would report to the Finance and Administration Commission. An assessment of the adequacy of the existing electrical service should also be undertaken.”

## St. Paul Catholic School Condition Initial Assessment

[The following is an initial assessment of the conditions of the school, based on a walk around evaluation by members of the school committee during the 2005-2006 school year, with input from Kim Hyland, MR1 Building Manager, Christopher Safranski, MR1, Andrea Hoeflein Parish Business Manager, as well as teachers' surveys.]

### School Physical Plant: 3 building sections:

- **1927** - Old section, historical building designation, includes Administration, Canfield Center, and Jr. High. [Note: Canfield Center subsequently renovated.] Historical building designation – has its own heating and cooling system.
- **1951** - Elementary school section and cafeteria.
- **1963** - Pre-school, gym, Specials classes, social worker.

### Roofing:

- Each building section has its own unique roofing architecture.
- Tuck pointing, chimney, and gutters need to be maintained and fixed as required, including shingles, underlayment, etc. Tuck pointing of school chimney and incinerator stack need to be done in 1927 building.
- The 1927 building downspouts need to be modified to drain away from the building and soil drains capped off. In that same building, may want to add heat tape on eaves and gutters.
- Oldest section has slate tiles – they seem to be in OK shape.
- Newer buildings roofs are more damaged. They leak severely. They are flat – not pitched properly – repaired in 1999 by a friend of a parishioner. No warranty. Bad materials and labor. Roof leaks in hallways and classrooms and closets and needs immediate repair. Current or previous collateral damage to infrastructure (e.g., Library, Art Room walls / shelves, Computer Center, Lunch Room, hallways, and various classroom ceiling tiles.)
- Other roof leaks: Alcove roof over Room 100; flat roof over maintenance office, back hallway and bathrooms (behind Canfield Center) Note: Breezeway roof replaced April 2006.

### Doors:

- A security and safety plan for all school facilities and activities needs to be developed.
- All doors need replacement
- Latch Key door was changed due to generosity of a donor but needs painting.
- All need electronic access for security reasons.

### Bathrooms

- Oldest section bathrooms (especially Jr. High section: 1st floor next to Teacher's lounge; 2nd floor next to Science class) need immediate repair. The two bathrooms are currently scheduled for renovation. Issues with Occupancy vs. ADA –
- In additions, all bathrooms in the school need to be upgraded. New floor and wall tiles. New vanities, commodes, urinals, and disposal baskets. New plumbing and lighting needed. May need to increase capabilities as required per ADA.

### Science Classroom - Jr. High:

- Floor damage under teachers' desk area from water pipe leaks in 2nd floor men's bathroom. Note: Plumbing problems fixed during bathroom renovation. Floor damage to be assessed summer 2006.

### Classrooms:

- Most classrooms have a radiator-type heating system - during warm days, heater stays on even if warm outside. Boilers are either ON or OFF, not regulated.
- Need to replace thermostats. Operation of pneumatic (Hot water) valves needs checking.
- Cooling by individual room air conditioners – needs dedicated electrical outlets.
- Ceiling tiles in somewhat fair condition – some exhibit water leak damage. Ceiling height and profile variable.
- Some classrooms do not have ceiling tiles and have not yet had finish plaster or paint applied since required asbestos removal.
- Flooring varies – tiles or carpet – and needs to be replaced
- Painting of classrooms is needed throughout, including Library, kitchen, cafeteria. Note: Eight classrooms have been painted during the 2005/2006 school year. On-going project.
- Outlet overload. Need electrical circuit for TV's, computers and A/C units (usage varies from 7,000 to 20,000 BTUs).
- Light fixtures need upgrading.
- P.A. speakers need replacement.
- Some chalkboards and white boards need to be replaced.
- Need a teacher and student desk repair and replacement program.
- Some classrooms need (additional) computer wiring.
- Classrooms need proper electrical drops for network wires.

### All Offices:

- Need heating and cooling system updates.
- Need overall reconditioning and improved décor (updated lighting, wiring, painting, flooring, furniture, etc.)

### Gym:

- Lighting usage is about 35,000 watts (35KW).
- Chris Safranski, MR1's regional manager's proposal: Replace light fixtures to fluorescent lighting for cost savings and overall lighting improvement. May want to consider motion sensors or timed lights so lights are not left on over night.
- Add ceiling (Casablanca) fans for better air circulation. Heating works well.
- Need for additional circuits, breakers (e.g., harvest fest). This problem should be resolved when the lighting improvements are completed.
- Stage floor – repair and refurbish.
- Water line needed to/from concession stand.
- Note: Lockers and bathrooms not widely used (occupancy considerations?).
- Safety issue with outside steps, lighting and sidewalks.
- Handicap access to gym, stage, and bathrooms should be considered.
- Work in conjunction with Athletic Director to upgrade all areas of the gym, including floor, stage, curtains, sound system, lighting, lockers, and bathrooms.
- Gym and stage bleachers need to be rebuilt or replaced.

### Lighting:

- Light fixtures need replacement (8-ft T-12) in hallways and some classrooms.
- See classroom, gym, and outdoor lighting improvements using daylight sensors.
- Significant maintenance time is spent turning lights on and off, a master switch for many areas should be considered.

### Maintenance:

- Regular preventive maintenance is tough due to workload and available staff. Most work done is in response to problems.
- Previous maintenance staff did not replace HVAC filters at church – plugged up.
- There is no written maintenance procedure- No report out (\$).
- A small (4'x4'x2') fire cabinet is needed for the storage of flammable materials.
- A 10'x10' shed at the back of school is needed for storage.
- A pick up truck with plow has been condemned and needs replacement.
- Refer to available literature, and ensure the school follows a detailed protocol. For reference, there is a comprehensive document, the Planning Guide for Maintaining School Facilities, which can be found in the following website:

<http://nces.ed.gov/pubs2003/2003347.pdf>

### Boilers/Plumbing:

- Relatively recent (1999) time frame
- Other equipment / plumbing : over 50 years old
- Not controlled or regulated: either ON or OFF – very inefficient. Needs controls for boilers with outside temperature override.
- Water plumbing to 1927 boys/girls bathrooms and teachers' lounge needs upgrading.
- Needs pneumatic controls for close-loop, heat-exchanger system. Needs to work in combination with class room unit heaters
- Needs a water softener for boiler feed water make up.
- Needs additional lagging (pipe insulation) on closed loop system and steam lines.
- Consider new plumbing and refrigeration to water drinking fountains.

### Air Conditioning and Ventilation

- Central A/C non-existent. Cooling by peripheral, individual room A/C units. More costly.
- Large blower fan in 1927 building – need close-loop system for air recycling (most air goes to attic in oldest building). Rooms too hot and “stuffy”.
- Look at the possibility of installing exhaust fans to circulate air.

### Windows:

- East side windows need some UV protection or window film.
- Old windows (in 1927 building) have historical designation and may be hard to replace. May need to be reconditioned. Some windows are hard to open (e.g., teachers' lounge.)
- Windows by gym/playground – look old and some are broken (kicked in).
- Windows in the Canfield Center need to be reconditioned and/or replaced.
- Window replacement program throughout (some cracked, broken, leaking or have BB holes.)
- Some shades, blinds, screens are broken or outdated and need to be replaced.

### Ceilings:

- All ceilings in hallways need to be finished (haven't been primed and/or painted.)

### Outdoors:

- School outdoor lighting needs to be put on daylight sensors.
- Side walks around school need replacement, and ¼" trip hazard.
- Flag pole needs mechanization and rope mechanism rebuilt and/or replaced.
- Improve the landscaping of the school and improve the drainage in the soccer field for safety reasons.
- Maintain the outdoor brick walls, and concrete steps around the school. Clean and paint as required and improve curb appeal.

### Lockers:

- 1927 bldg hallways: OK
- 1951 bldg hallways: needs replacement
- 1963 bldg: hallways: need replacement

### Flooring:

- Looks old, stained, and is mismatched – same with carpet

### Cafeteria:

- Need P.A. systems and ceiling speakers.
- Need ventilation.
- Need improved electrical loading.

### Kitchen:

- Need to replace ceiling tiles.
- Need more electrical circuits.
- Ovens and stoves need to be repaired as required.
- New refrigerator/freezer is required.
- Need ventilation.
- Steam table is getting old and cracking. Will need replacement eventually.

### Computer Room:

- Needs more wiring.
- Needs more electrical outlets.

### Exhaust Fans:

- All the exhaust fans in the school (dish washing room, cafeteria, kitchen, library, art room, lab, basement, maintenance room, gym, 2<sup>nd</sup> floor lobby, etc.) need to be replaced.

### Art Room:

- Lacks proper storage – shelving needs replacement from previous roof leak damage.
- Kiln will need to be replaced eventually. Needs an exhaust fan replacement.
- For the size of the room, needs an adequate A/C unit.

## **St. Paul Catholic School Financial Strategic Plan**

### **Vision**

Improve the financial well being of St. Paul Catholic School and ensure its long-term viability by anticipating and planning for our financial needs.

### **Observations**

- Enrollment:
  - Based on the latest academic year status and other regression analyses, student enrollment is predicted to stabilize at current levels.
  - The decline in enrollment coincides with increases in tuition to add revenue. More revenue is being collected from fewer children.
  - The School has the potential and the need to maintain and increase enrollment.
  
- Revenue:
  - The Parish (including the School) maintains a balanced budget. The operation of the school is viable from the financial standpoint.
  - The School generates and collects sufficient revenue to offset between 85% and 100% of instructional salaries and benefits. Tuition (the largest portion of revenue) funds more than 50% of the operating budget.
  - The School carries out successful fundraising efforts through the TPG. These funds are used for a variety of educational and enrichment programs.
  - The School receives a generous and consistent parish subsidy that falls far below the Archdiocese of Detroit (AOD) guidelines of a maximum of 40% as a percentage of parish collections.
  
- Expenses:
  - The increases in tuition coincide with increases in some operating costs, particularly inflation and double-digit percent increases in fringe benefits.
  - Lack of capital projects or deferred repairs and improvements have kept expenses from further escalation.
  
- Long-term:
  - Any major increase in expenditures and/or a major decrease in enrollment will compromise the ability of the school to operate within the AOD guidelines.

### **Recommendations**

- The tuition rates must be set at competitive levels compared to other schools, while maintaining affordability to all children and not just the wealthiest parishioners. Increases in tuition directly or indirectly affect enrollment. Therefore, it is important to maintain and increase enrollment to maintain a revenue base and spread the costs.
- The operation of the school is being managed by balancing tuition revenue and minimizing costs, while maintaining a subsidy within AOD guidelines. Therefore, any capital projects must be undertaken through a fundraising capital campaign and capital budget process, separate from the school's operating budget.

## Strategies

1. Enhance the fiscal viability of St. Paul Catholic School.
  - Demonstrate a measurable improvement in financial performance through controlling non-fixed expenses.
  - Support Teacher Parent Guild (TPG) fundraising efforts.
  - Determine appropriate expenditures that may be covered by TPG funds on a short-term basis.
  - Work closely with Finance and Administration Commission concerning parish subsidy level.
2. Enhance marketing efforts to retain and attract new students.
3. Implement Capital Campaign for renovation of the school facility.
4. Research available grant programs to augment the school funding and programs.
5. Research an annual giving program to provide additional funds for needed projects.
6. Develop a long-term endowment program.
7. Explore with the TPG the ability to target fundraisers for specific capital improvements.

## Assumptions

- [Based on a March 16, 2006 meeting between Mike Cumming (School Committee) with the school Principal, Mary Miller, and the Parish Business Manager, Andrea Hoeflin, supplemented with additional communications between them.]
- Refer to the Financial Strategic Plan spreadsheet covering historical school years 2002-2005, current “budget” year 2005-2006, and “forecast” years 2006-2010.
- This spreadsheet is based on a modified income statement for the school which can not be used in its present AOD-form. Because the reporting to the Archdiocese clearly does not follow generally accepted accounting principles, and there are items that the school committee will want to consider that would normally not be reported on budgets or forecasts to the Archdiocese, our “forecast” will track the historical revenue and expense line items. Conversely, there are line items such as “Prepaid Tuition” (#0799, and again in expenses) and “Transfers to Savings” which were needed only to balance and/or to conform to Archdiocesan accrual guidelines, which are also superfluous for our analysis (i.e.; proper reconciliation exercises would show that our spreadsheet columns for the years at issue always balance when these items are [appropriately] disregarded).
- Mary Miller considered a stable enrollment the only realistic assumption for the ensuing five years. That number would be 470 students and falls within statistical (regression) analyses (available upon request). This number will have to be adjusted annually. On line #0701 for school tuition, Mrs. Miller and Andrea Hoeflin agreed that for the time being a 3.5% annual increase assumption was reasonable.

Note that, after all the numbers float out on the spreadsheet, this number may also have to be adjusted.

- Line #0702 “Other Fees” has historically included library fines and proceeds from the book fair. In the 2002/2003 fiscal year, registration fees were included and that is why that figure is just under \$82,000. Going forward, assume \$2,000 in these miscellaneous fees for this line item for each year.
- Line #0703 “Bequests and Donations” includes both TPG fund raising (which is variable on an annual basis, of course) and distributions from the Educational Trust, which can be straight-lined at \$40,000 annually. After much discussion and analysis, including a discussion of the TPG “Revenue Sharing” phenomena which will be discussed below, we concluded that it would be reasonable to assume a blended average of \$175,000 for each of the future five years. This amount consists of \$40,000 from the Educational Trust and an average auction collection of \$135,000.
- Although this once again varies from Archdiocese accounting reporting conventions, we are including (in total) approximately two-thirds of the TPG annual revenue as income items and as flow-out expense items. The other one-third is dedicated and fully used by the TPG for assorted miscellaneous direct expenses (these are all audited by and reported to the Principal and the School Committee). For instance, last year the approximate total TPG revenue was \$150,000, of which \$100,000 came in on various revenue line items but were expensed in various total school instructional expense categories. The other \$50,000 was dedicated to appropriate “off income statement” expenses. Mrs. Miller has a schedule of these items which are reviewed on an annual basis anyway. In any case, the revised forecast (which is based upon annotated income statements for each year) assumes about two-thirds going into the correct income categories and about two-thirds coming out of the correct expense categories, so this is probably not a significant issue, but it is mentioned for the sake of accuracy.
- Line #0706 is fund raising income. It includes proceeds from the golf outing and various sports camps. We should straight-line this amount at \$53,000 annually.
- Line #0708 is income on the school’s bank account with the Archdiocese. We earn 4% interest. To be conservative, we estimate that we should straight-line the \$6,500 for the forecast year but increase it by 3.5% annually in order to coordinate with the tuition increases.
- Line #0709 is miscellaneous income and we agreed to straight-line this at \$35,000 annually (latchkey, child care, etc.).
- Line #0730 is food service income and this amount ends up being a wash with line #7300 “Total Cafeteria Expenses.” Both of them should be straight-lined at \$98,000 per year.
- Line #0775 is “student activities” income and this encompasses fees from forensics, leadership council, the Gettysburg trip, etc. We decided to budget \$70,000 for the plan and an equivalent amount will come out under line #7754 as an expense under “other student activities”.
- As for school administration expenses, line #7001 is administration salaries and should be inputted at the present figure of \$229,000 for the forecast year with a 3% annual increase for the future years.
- Line #7002 is primarily for health insurance. Taking into account the historically recent phase-out of the family benefits for employees, we considered a 10% annual increase to be reasonable; therefore, we will use that for the plan. Thus, the first year of the plan will be 110% of \$67,108.

- Line #7003 is labeled “Contracted Services” but is primarily for copier expenses. We used \$12,000 with a 3% annual increase.
- Line #7004 is for general administration expenses which has been the subject of some cost-cutting. Use \$11,250 for our forecast year with a 3% annual increase.
- Line #7005 is for publications and periodicals. The \$750 annual amount appeared reasonable given the year-to-date expenses, but increase it at 3% annually.
- Line #7006 is for staff development, which includes TPG’s subsidized costs for seminars, etc. After discussing the need for enhanced teacher development and some annual variation in the cost, we concluded that \$7,500 per year with 3% annual increases would be reasonable.
- Line #7007 is for hospitality expenses. \$2,000 annually subject to the 3% annual increase should be used.
- Line #7008 is labeled “Fund Raising” but is largely dedicated to the golf outing expenses. This should be straight-lined at \$25,000 annually.
- Line #7011 “Technical Services” is primarily for computer support. There are increasing costs for this particular category with various cost-sharing and contracted arrangements being examined. We considered \$20,000 annually, subject to the 3% annual increase, to be a reasonable projection.
- Line #7040 “Other Administration Expenses” includes costs such as various testing (including the IOWA testing) and the like. \$4,000 per year subject to the 3% annual increase was considered reasonable.
- Line #7101 “Instructional Salaries” includes teacher salaries as well as the latchkey personnel. Increase the \$1,001,354 amount by 3% annually going forward.
- Line #7102 is for instructor’s fringe benefits and we should go with the \$293,781 figure but increase it by 10% annually going forward.
- Line #7111 is for “consumable” textbooks. It was reasonable to straight-line \$15,000 per year.
- Line #7112 is for instructional material and supplies which are in some sore need of annual replacement. After much discussion (also concerning the TPG underwriting of much of this cost) we decided that it would be reasonable to estimate this cost at \$155,000 per year.
- Line #7113 is for the library. \$6,500 per year was considered reasonable.
- Line #7114 is for audio/visual material and supplies. We decided to straight-line this amount at \$1,500.
- Line #7140 is for other instructional expenses and \$2,000 per year was considered reasonable.
- Line #7100 will obviously be a calculated number for the above.
- Line #7300 “Total Cafeteria Expenses” was discussed above and should be inputted at \$98,000 annually.
- Line #7754 for other student activities should also be straight-lined at \$70,000 annually.
- Lines #7801 and 7802 for plant salaries should be reduced to zero for each year because we are now contracting out those expenses.
- Line #7803 for plant contracted services. This line item includes the following accounts: service maintenance contracts, snow removal, lawn maintenance, and building maintenance and repairs. Going forward, maintenance and repairs is a reasonable expense that should be provided for annually and has been largely ignored in recent history for our school. For FY 2006-2007, we plan on budgeting this line item at approximately \$167,000. The current year's budget includes

\$56,000 which is designated for the renovation of two school bathrooms. Going forward, we would project a 7.5% increase.

- Line #7825 Utilities - This line item includes the following accounts: Electricity, Heating and Water. For FY 2006-07, we plan on budgeting this line item at approximately \$110,000. The rate for future increases is unknown at this time so we would estimate a percentage increase for future years of 22.5%. (Note: For budgeting purposes, the Archdiocese publishes recommended increases for utilities but last year they significantly underestimated rate increases therefore we should be cautious to use their numbers going forward)..
- Line #7826 "Plant Maintenance Supplies" should be set at \$11,000 with a 3% annual increase.
- Line #7840 "Other Plant Expenses" can be set at \$4,000 with a 3% annual increase.
- Line #7800 "Total School Maintenance" is obviously a computed figure.
- We decided to not address the concept of prepaid tuition coming in as a revenue item as well as a wash expense item. This is only included due to Archdiocese reporting requirements and is at some variance with the "cash basis" accounting system elsewhere used in the income statement.
- "Transfer to Savings" will also be ignored as it is more of a cash flow item in order to balance and is of a negligible amount.
- The "Total Expenses" will obviously be a calculated figure and the parish subsidy will also be a resulting calculated figure.
- As an aside, there were two other issues discussed. First, a significant variance in the parish subsidy calculated on the school income statement as opposed to the parish-wide income statement published in the Church Reporter was discussed. If you take the total school tuition revenue and subtract the total school expenses reported in the parish-wide statement published in the Reporter, you get a parish subsidy of only about \$215,000 as of the last fiscal year. Andrea Hoeflin reconciled the difference to the school financials and, in summary, it boils down to the parish-wide numbers reported in the Reporter not including 40% of the total annual maintenance costs. The total maintenance costs are broken down 40% to the school, 40% to the church, and 20% to religious education. The school budget takes that into account. For some reason, the previous Pastor (Bishop Blair) did not want the maintenance costs to be broken-out in the parish-wide income statement published in the Reporter.
- Secondly, there has been some misinformation about our exceeding Archdiocese guidelines for the parish subsidy rate. Although this may have been the case in the past, our present parish subsidy rates stands at about 27%, calculated as the ratio of the school subsidy to the overall parish collections. The Archdiocese policy is simply that it should not exceed 40%. Given that our parish concluded that Catholic schools are a priority, this parish subsidy rate may be less of an issue than some have made it recently.
- The assumptions regarding parish collections (denominator) for the parish subsidy (numerator) calculation is as follows: Through June 30, 2005, the historical numbers are used. For the "Forecast 2005/2006" Fiscal Year, the number is calculated using an annualization of the parish collections reported as follows: 7/1/2005 through 3/29/2006 ACTUAL collections: \$1,649,073 (for 272 days), modified to account for approx. \$300,000 temporary increase in December, 2005 (\$4,960/day without holiday-donation effect). Annualized=\$2,110,400; therefore, assume conservative 2% annual increase for each following year in plan period.

**ST. PAUL CATHOLIC SCHOOL**  
**2005-2006 FINANCIAL STRATEGIC PLAN**

	July 1, 2002- June 30, 2003	July 1, 2003- June 30, 2004	July 1, 2004- June 30, 2005	July 1, 2005- June 30, 2006 BUDGET	July 1, 2006- June 30, 2007 FORECAST	July 1, 2007- June 30, 2008 FORECAST	July 1, 2008- June 30, 2009 FORECAST	July 1, 2009- June 30, 2010 FORECAST
<b>Enrollment</b>	502	472	484	466	470	470	470	470
<b><u>INCOME (\$)</u></b>								
#0701-Tuition	1,140,048	1,219,255	1,304,638	1,359,750	1,407,341	1,456,598	1,507,579	1,560,344
#0702-Fees	81,951	2,928	2,302	2,000	2,000	2,000	2,000	2,000
#0703-Beq. & Donations	160,884	209,571	138,935	188,000	175,000	175,000	175,000	175,000
#0706-Fd. Raising Income	3,223	15	-	53,000	53,000	53,000	53,000	53,000
#0708-Interest	7,748	7,334	13,453	6,500	6,728	6,963	7,207	7,459
#0709-Misc. Income	20,374	37,763	37,563	35,000	35,000	35,000	35,000	35,000
#0730-Food Serv. Income	104,093	92,201	98,102	98,000	98,000	98,000	98,000	98,000
#0775-Student.Act.Income	70,170	61,397	71,612	70,000	70,000	70,000	70,000	70,000
<b>TOTAL INCOME (\$)</b>	<b>1,588,491</b>	<b>1,630,464</b>	<b>1,666,605</b>	<b>1,812,250</b>	<b>1,847,069</b>	<b>1,896,561</b>	<b>1,947,786</b>	<b>2,000,803</b>
<b><u>EXPENSES (\$)</u></b>								
#7001-Admin. Salaries	204,400	180,781	201,153	229,000	235,870	244,125	252,670	261,513
#7002-Admin. Fringes	65,744	66,509	68,561	67,108	73,819	81,200	89,321	98,252
#7003-Contracted.Services	-	2,764	12,386	12,000	12,360	12,731	13,113	13,506
#7004-General Expenses	22,014	20,559	12,946	11,250	11,588	11,935	12,293	12,662
#7005-Publics&Periodicals	-	900	398	750	773	796	820	844
#7006-Staff Development	1,265	4,000	2,487	7,500	7,725	7,957	8,195	8,441
#7007-Hospitality	4,263	3,837	3,556	2,000	2,060	2,122	2,185	2,251
#7008-Fund Raising	-	-	-	25,000	25,000	25,000	25,000	25,000
#7011-Tech.Services	4,706	5,954	22,662	20,000	20,600	21,218	21,855	22,510
#7040-Other.Admin. Exp.	3,155	5,496	4,993	4,000	4,120	4,244	4,371	4,502
#7101-Instructional Salaries	1,011,650	1,009,196	1,017,031	1,001,354	1,031,395	1,062,336	1,094,207	1,127,033
#7102-Instructional Fringes	314,622	301,142	304,359	293,781	323,159	355,475	391,023	430,124
#7111-Textbooks(Ann.Exp'd)	18,954	15,320	13,820	15,000	15,000	15,000	15,000	15,000
#7112-Inst'l.Mat.&Supplies	118,621	178,598	110,714	155,000	155,000	155,000	155,000	155,000
#7113-Library	6,231	6,479	5,393	6,500	6,500	6,500	6,500	6,500
#7114-AV Material Supplies	1,250	169	1,416	1,500	1,500	1,500	1,500	1,500
#7140-Other Instr'l Expenses	5,000	5,123	5,182	2,000	2,000	2,000	2,000	2,000
#7300-Total Cafeteria Exps.	103,176	86,734	90,712	98,000	98,000	98,000	98,000	98,000
#7754-Other Student Activities	69,402	58,585	69,909	70,000	70,000	70,000	70,000	70,000
#7801-Plant Salaries	84,918	91,927	65,015	-	-	-	-	-
#7802-Plant Fringes	39,582	54,238	30,300	-	-	-	-	-
#7803-Plant Contracted Servs	62,500	54,710	99,167	165,100	167,000	179,525	192,989	207,464
#7825-Utilities	47,883	128,900	78,112	90,950	110,000	134,750	165,069	202,209
#7826-Plant Maint Supplies	16,205	8,698	12,710	11,000	11,330	11,670	12,020	12,381
#7840-Other Plant Expenses	350	1,854	3,376	4,000	4,120	4,244	4,371	4,502
<b>TOTAL EXPENSES (\$)</b>	<b>2,205,891</b>	<b>2,292,473</b>	<b>2,236,358</b>	<b>2,292,793</b>	<b>2,388,919</b>	<b>2,507,328</b>	<b>2,637,502</b>	<b>2,781,194</b>
<b><u>PARISH SUBSIDY (\$)</u></b>	(617,400)	(662,009)	(569,753)	(480,543)	(541,850)	(610,767)	(689,716)	(780,391)
<b><u>PARISH COLLECTION (\$)</u></b>	2,686,000	2,220,000	2,120,378	2,110,400	2,152,608	2,195,660	2,239,573	2,284,364
<b><u>PARISH SUBSIDY %</u></b>	<b>23%</b>	<b>30%</b>	<b>27%</b>	<b>23%</b>	<b>25%</b>	<b>28%</b>	<b>31%</b>	<b>34%</b>

\* Cash basis. This schedule ignores Archdiocesan prepaid tuition income and expense accrual items, which are an approximate wash. - DRAFT APRIL 11, 2006

## **St. Paul Catholic School Marketing Strategic Plan**

### **Vision**

This marketing plan is intended to support the mission of St. Paul Catholic School; to enable each child to develop his/her full potential – spiritually, intellectually, emotionally, physically, and socially.

### **Objectives**

The objectives of the marketing plan are:

- To foster a strong sense of community
- Support student retention and recruitment efforts, especially retention of students transitioning into the Middle School
- Develop and maintain the “St. Paul brand”
- Ensure adequate coordination of marketing and communications activities
- Support the development and maintenance of promotional materials

### **Strategies**

#### **1. Develop a marketing plan for school initiatives.**

It is important to consider each of the following components when undertaking any particular marketing activity on behalf of the school.

- Which plan objectives are being met?
- What is the target audience?
- What is our specific message?
- How are we communicating the message?

These components establish the marketing plan for particular initiatives.

#### **2. Determine Target Audiences – to whom should we market?**

Marketing activities and materials will be directed at various audiences. These audiences can generally be considered to be either external to the School or internal to it. Potential target audiences are listed below. The specific audiences for any particular message will be determined according to plan goals and the particular needs of the School.

##### External

- General public, e.g. Grosse Pointe, St. Clair Shores, Metro Eastside, Detroit, Harper Woods
- St. Paul School Alumni
- Prospective students and families
  - Parishioners not enrolled in school, especially families of children recently baptized at St. Paul
  - Religious Education students
  - Families new to Grosse Pointe (consider leveraging local real estate agents)
  - Parishioners without school age children

### Internal (to the School)

- Enrolled students / families
  - Focus on 5<sup>th</sup> graders moving into 6<sup>th</sup> grade, and 7<sup>th</sup> grade students considering Catholic High Schools
  - Preschoolers and kindergarteners moving ahead
  - All other students
- Parents
- Teachers and Staff

### **3. Marketing Messages – What are we trying to market?**

The marketing messages are what we would like to communicate to the target audience. Select general messages include:

- Develop the St. Paul Catholic School “brand”
  - Determine whether a specific “brand” should be adopted for use year after year. Annual themes can flow from this brand. Note: “Anchored in Faith” and other annually developed brands have been used in the past.
- The Catholic faith foundation
- Strong academics,
- Potential designation as a Blue Ribbon school
- Athletics
- Facilities (e.g. improved décor, infrastructure, and curb appeal)
- Sense of community, family focus
- Additional considerations
  - Professionalism
  - Teacher – qualifications, education, degrees, certifications, years of service
  - Trends in educations – cutting edge with technology, differentiation, separately housed middle school
  - Teaching self discipline, respect, accountability
  - Strong moral values
  - Teacher/Student Ratio and class sizes – compared to other area Catholic schools
  - Tuition rates – compared to other area Catholic schools, private schools
  - Structured and disciplined environment
  - Targeted recruiting and admissions based on positive, Christian criteria

### **4. Marketing Channels and Mechanisms – How are we marketing what and to whom?**

Various marketing channels may be employed to support the plan objectives. Specific channels and mechanisms should be evaluated in terms of value and costs.

- Church weekly reporter
- Broader parish mailing, or other communications medium
- Newsletters of other parishes

- Grosse Pointe News
- Other local papers
- School web site
- Other web sites: e.g. "greatschools.com"
- School publications: Green Letter, Middle school newspaper project
- Mass mailings
- Annual open house
- Word of mouth
- Community cable station
- Alumni communications: separate or linked to reunions
- Parish activities, e.g. the Parish picnic, Mothers of Young Families, Altar Society

## **5. Action Plan**

- Establish a school marketing committee
- Identify roles and responsibilities of specific individuals. Secure a key volunteer to lead the initiative.
- Develop and implement a tactical 3-year marketing plan, expanding on this strategic plan
- Develop tracking and effectiveness mechanism for plan
- Develop specific checklist/protocol/process for addressing calls to the School office from prospective families
- Assess potential to develop and maintain a database/listing of School alumni
- Work with Tamara Hull / Archdiocese regarding the marketing plan recently developed by the public relations firm Caponigro

**2005-2006 St. Paul Catholic School Committee**  
**Strategic Plan Sub-Committees Membership**

**Curriculum Sub-Committee**

- Ann Blake
- Paula Engel
- Laura Gazall
- Beth Reilly (chair)

**Facilities Sub-Committee**

- Joan Capuano
- Ed Gamero (chair)
- Monica Wilkinson

**Financial Sub-Committee**

- Ann Blake
- Mike Cumming (chair)
- Ed Gamero
- Rick Whitney

**Marketing Sub-Committee**

- Paula Engel
- Laura Gazall
- Jane Lehman
- Rick Whitney (chair)

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