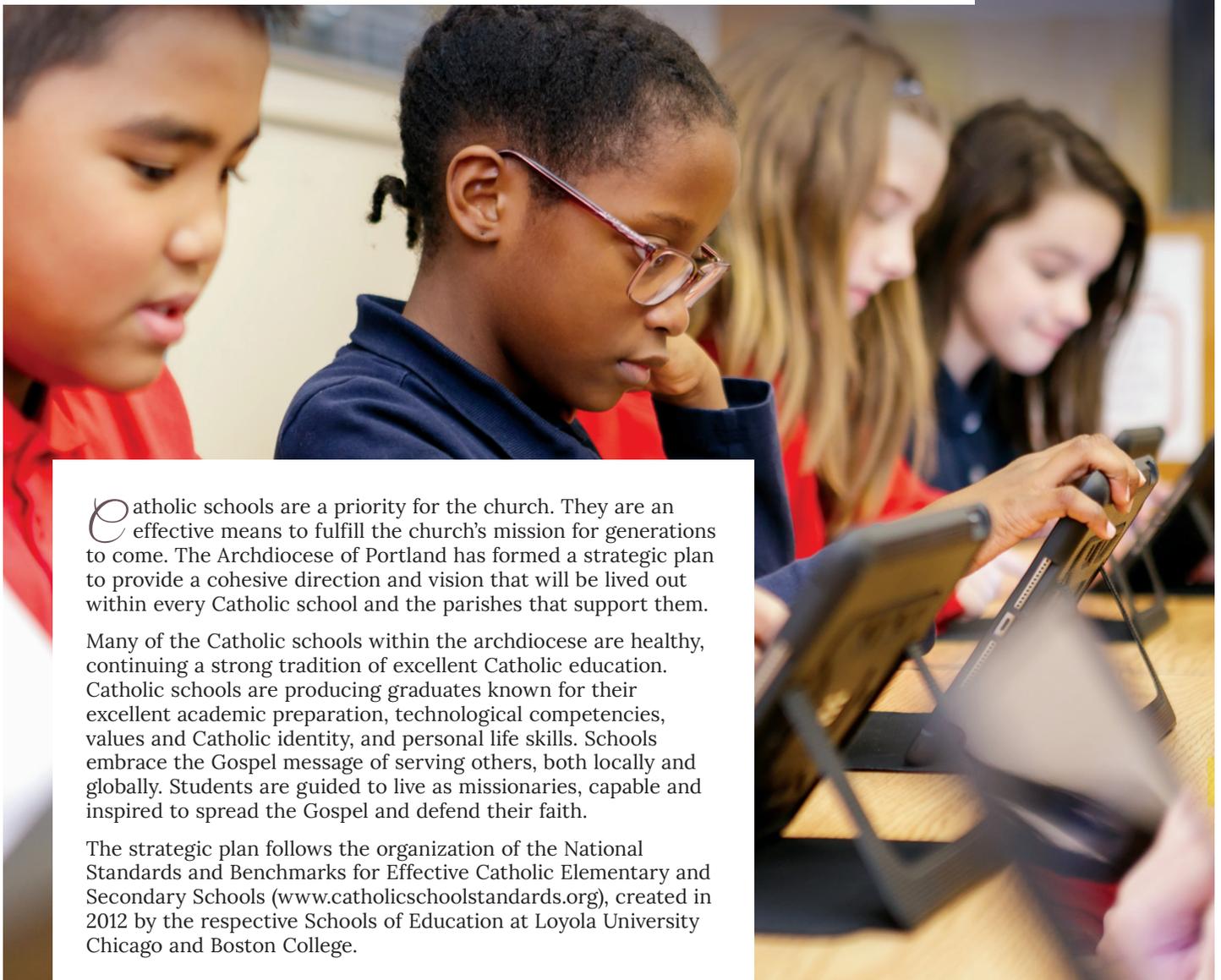


# A Vision for the Future



Catholic schools are a priority for the church. They are an effective means to fulfill the church's mission for generations to come. The Archdiocese of Portland has formed a strategic plan to provide a cohesive direction and vision that will be lived out within every Catholic school and the parishes that support them.

Many of the Catholic schools within the archdiocese are healthy, continuing a strong tradition of excellent Catholic education. Catholic schools are producing graduates known for their excellent academic preparation, technological competencies, values and Catholic identity, and personal life skills. Schools embrace the Gospel message of serving others, both locally and globally. Students are guided to live as missionaries, capable and inspired to spread the Gospel and defend their faith.

The strategic plan follows the organization of the National Standards and Benchmarks for Effective Catholic Elementary and Secondary Schools ([www.catholicsschoolstandards.org](http://www.catholicsschoolstandards.org)), created in 2012 by the respective Schools of Education at Loyola University Chicago and Boston College.

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## INTRODUCTION

Catholic schools in the Archdiocese of Portland are a priority for the church. They are an effective means to fulfill the church's mission for generations to come. The archdiocese has formed a strategic plan to provide a cohesive direction and vision that will be lived out within every Catholic school and the parishes that support them.

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Key to the development of the strategic plan was the Strategic Planning Committee. This committee included representatives from various constituencies and actively provided leadership, insights, and expertise that ensured the success of the planning process. Its membership included:

### Strategic Planning Committee for the Archdiocese of Portland

Name	Relationship to Archdiocese of Portland in Oregon
Brother William Dygert CSC, Ph.D.	Superintendent
Jeannie M Ray-Timoney, Ed.D.	Associate Superintendent
Gary Beckley, Ed.D.	Associate Superintendent
Rev. John Henderson	Archdiocesan Pastoral Council; Pastor, St. Anthony Parish
Amanda Davidson (Merrill)	Principal, St. Paul Parochial
Danyelle Ramsey	Assistant Principal; Campus Ministry, Central Catholic High School
John Limb	Publisher Emeritus, Oregon Catholic Press
Karen Asbury	Principal, St. Rose School
Marc Dickinson	Finance Manager, Intel
Mary Dolan	Assistant Director, PACE program, University of Portland
John Matcovich	President, Valley Catholic School
Steve Day	Vice President of Institutional Advancement, La Salle Prep
Suzanne Graf	President, Marist Catholic High School
Brian Williams	Former Controller, Archdiocese of Portland (retired)
Michelle Braulick	Director of Finance, Archdiocese of Portland

# A VISION FOR THE FUTURE

## for Catholic Schools in the Archdiocese of Portland

*INTRODUCTION: This vision statement describes a desired future for all Catholic schools in the archdiocese, with the understanding schools already exemplify many of these attributes to varying degrees, and all schools can rise to embrace them even better with greater consistency, creativity, and collaboration.*

Catholic schools will have a **clear Catholic identity**, making missionary disciples of Christ among the emerging generation and transforming the world.

- The entire Catholic school experience will be illuminated by the Catholic faith in ways relevant for students in their culture.
- Students will come to know God and experience Christ in a personal relationship.
- The evangelization of the family will help parents know God and experience Christ along with their students.
- Parents will be engaged in the spiritual development of their children and all aspects of their education.
- Teachers, administrators and staff will reflect and model Catholic values.
- Students will learn to be service minded and embrace Catholic social teachings.
- Every school will be a strong community of faith that has close ties with the local sponsoring parishes and surrounding parishes.
- Parents and students will be connected to and serve in their local parish communities.
- The mission of Catholic school education will be an integral part of the mission of every parish.

Catholic schools will be **academically excellent**, preparing students holistically (spiritually, intellectually, morally and physically) for the world in which they will live.

- Teaching methodologies, educational programs, and school facilities will support a 21st century education.
- Catholic schools will be creative and flexible in how they deliver an outstanding education serving a wide range of student needs in a variety of circumstances.

Catholic schools will be **available and accessible** throughout the archdiocese today and for generations to come.

- Catholic schools will be available and present where Catholics are living and are anticipated to be living in the future.
- Parents from all income levels will be able to access Catholic schools, particularly middle and low-income families.
- Catholic schools will employ strong financial models and business practices, ensuring long-term viability.
- Participation from growing ethnic groups will mirror the cultural and economic demographics of the local community.
- Participation from students with special learning needs will be accommodated whenever possible.
- Donors, alum, and alum families will be motivated to invest in Catholic schools and to trust Catholic school leaders to be capable stewards of those resources.

# I. CATHOLIC IDENTITY AND MISSIONARY DISCIPLESHIP

## Goals and Strategies

1. Every archdiocesan high school and parish elementary school will employ the National Standards and Benchmarks for Effective Catholic Elementary and Secondary Schools, specifically “The Defining Characteristics of Catholic Schools,” and the Western Catholic Education Association accreditation process to have a common understanding of Catholic Identity.

### *Strategies*

- 1.1 Regularly evaluate, review and affirm the school’s mission statement. The mission statement will be ubiquitous within the school building and regularly communicated to parents.
- 1.2 All elementary religion textbooks will be approved by the USCCB as being in conformity with the Catechism of the Catholic Church. The high school theology programs will follow the *Doctrinal Elements of a Curricular Framework for Young People of High School Age* published by the USCCB.
- 1.3 Provide liturgical opportunities for students and staff such as all-school Masses and Reconciliation at regular intervals throughout the school year.
- 1.4 Structure service learning programs to flow from and be related to the curriculum and be developmental in nature, providing age-appropriate experiences in the local community that increase in complexity and intimacy as the child grows older. Reflection will be an essential component of each program.
- 1.5 Establish and implement expectations for faculty and staff regarding their presence and their serving as role models during liturgy, prayer and other faith experiences. Involve all faculty and staff in leadership roles during prayer, liturgy, service opportunities, etc.
- 1.6 Invite families of students to become part of the school’s faith community. Provide appropriate seating or locations for parents at liturgical celebrations.
- 1.7 Provide varied opportunities for members of the parent community to deepen their own faith and share their faith life with other community members.

## **2. Continue to implement the faith formation program for faculty, staff and parents.**

### *Strategies*

- 2.1 Continue to require catechetical certification and faith formation through the University of Notre Dame for all professional staff as currently outlined by the policies of the archdiocese.
- 2.2 Maintain the orientation for all new faculty and staff as well as an ongoing formation program for all faculty and staff regarding their personal responsibility for carrying out the school's Catholic identity and mission in action and words.
- 2.3 Institute an orientation for all new students and families. Review expectations the school has for families regarding Catholic formation, academic achievement and overall school policies. Explain the symbiotic yet distinct roles of parent and school in the education of each child.
- 2.4 A faith formation team of faculty and staff at each school will plan ongoing faith formation activities for the teachers and staff members to support their personal and communal spiritual life. Some examples of activities include book studies, worship and all-staff retreats.
- 2.5 The school principal and president will continue to lead the school community in prayer and reflective exercises that deepen the faith lives of the children, teachers, staff and families.

## **3. Clarify and articulate the expected relationship between Catholic schools and all parishes.**

### *Strategies*

- 3.1 The Department of Catholic Schools, the Archbishop and the Priest Personnel Board will collaborate to reinvigorate clergy regarding Catholic school education. Pastors who thrive in school parish settings will be identified and invited to share best practices and discuss the benefits of a Catholic school in parish life.
- 3.2 Provide specific instruction for priests and seminarians and new pastors with schools regarding school administration, including human resources and finances. Provide experienced school pastors as mentors to new pastors with schools.
- 3.3 Institute various activities for school children to interact with parishioners of the sponsoring parishes, especially on Sundays, holy days or special days.
- 3.4 High schools will engage parishes by communicating with them regarding parish students at the high school from their parishes, continuing to invite parish priests to liturgical celebrations and encouraging their students to volunteer and become involved with their local parish.
- 3.5 Catholic schools will cooperate with parishes by providing support for sacramental preparation.
- 3.6 Parishes and schools should institute monthly Sunday outreach Masses that are assigned to each class. Instruct students in that class to attend the Mass in their home parish in uniform with their families and assign them to serve as greeters, readers, gift bearers, choir and read petitions.
- 3.7 Schools should frequently update parishioners of all parishes in the school's attendance area of the students' academic, religious, athletic and social/emotional growth through a variety of vehicles such as social media, bulletin postings, displays in the church lobby, and special pulpit announcements.
- 3.8 The sponsoring parishes will provide opportunities to re-evangelize parents and connect school families to parish life.

## II. LEADERSHIP

### Goals and Strategies

#### 1. Leadership development will continue to be a priority of the Department of Catholic Schools.

##### *Strategies*

- 1.1 Provide consistent formation to all new principals and presidents throughout their first two years, including orientation, direct instruction and mentoring.
- 1.2 Provide annual in-service for pastors and school administrators sharing best practices for improvement.
- 1.3 Continually strive to identify potential leaders and provide them with leadership opportunities.
- 1.4 Engage in succession planning for critical administrative positions in schools.
- 1.5 Continue developing and implementing instruments for formative and summative evaluations of school administrators.
- 1.6 Continue to provide in-service for all school governance bodies. New members will receive orientation to their role and responsibilities.

#### 2. The role and responsibilities of the Department of Catholic Schools will be understood by school administrators and board members.

##### *Strategies*

- 2.1 Every school will continue to be visited annually by a representative of the Department of Catholic Schools.
- 2.2 The fundamental role of the Department of Catholic Schools is to support quality, mission and collaboration within and among schools. To that end, the Department of Catholic Schools will engage with schools by providing support for areas such as advancement, professional development, curriculum development, marketing and human resources.
- 2.3 Inform priests in every parish of the responsibilities and authority of the Department of Catholic Schools.

## III. ACADEMIC EXCELLENCE

### Goals and Strategies

#### 1. The Department of Catholic Schools in the Archdiocese of Portland in collaboration with each school within the Archdiocese of Portland will develop a clearly articulated curriculum.

##### *Strategies*

- 1.1 The Department of Catholic Schools will facilitate systemic Professional Learning Communities (PLCs) among and within schools.
- 1.2 The Department of Catholic School in collaboration with each school will continue to develop an overall, coherent curriculum, utilizing best practice techniques such as backward design and 21<sup>st</sup>

century learning principles which will enable the development of 21<sup>st</sup> century learning skills: creativity, innovation, critical thinking and problem solving, communication, and collaboration.

- 1.3 Every school will have innovative practices throughout its curriculum with an emphasis on problem-based activities, such as an age-appropriate STEM program.
- 1.4 Schools will welcome exceptional learners, those with special needs, and those who are gifted and talented. Schools will make both groups a focal point for a school's curriculum and the distribution of resources.
- 1.5 Multiple forms of assessments will be utilized to analyze and measure student achievement and to inform instructional programs and progress toward learning outcomes.

## **2. Each school will deliver a comprehensive, holistic educational experience.**

### *Strategies*

- 2.1 Technology will be integrated into the academic program as a tool to support learning in all schools.
- 2.2 All schools will ensure that co-curricular and extra-curricular activities are an integral part of the school experience and promote the Catholic mission of the school.
- 2.3 Schools will collaborate in determining a plan to provide services of credentialed teachers of art, music, physical education, languages, and other non-core academic areas, as well as qualified specialists like resource teachers, guidance counselors and technology support staff.
- 2.4 Blended learning will be used as a component within the curriculum and distance learning will be used to expand curriculum options.

## **3. In collaboration with the Department of Catholic Schools, each school will provide professional development to form excellent teachers and school leaders.**

### *Strategies*

- 3.1 Teacher evaluation will be both formative and summative using tools determined by the Department of Catholic Schools.
- 3.2 The faculty and professional support staff will meet archdiocesan, state, and national requirements for academic preparation and licensing to ensure their capacity to provide effective curriculum and instruction.
- 3.3 Professional development for faculty and professional support staff will focus on continuously improving knowledge and skills necessary for effective instruction, integration of technology, cultural sensitivity, and modeling of Gospel values.
- 3.4 School-wide and student data generated by a variety of tools will be used to monitor, review, and evaluate the curriculum and co-curricular programs and to plan for continued and sustained student growth.

## IV. ENROLLMENT MANAGEMENT

### Goals and Strategies

#### 1. Catholic schools will be marketed effectively to publicize the value and benefits of Catholic schools, support advancement efforts and increase enrollment.

##### *Strategies*

- 1.1 An archdiocesan-wide marketing/recruitment/retention plan will be developed to aggressively market all Catholic schools.
  - The Department of Catholic Schools will collect the best ideas and study best practices around the country.
  - The marketing program will promote the mission and value of Catholic schools and distinguish Catholic schools from other educational options.
  - The marketing program will explain all that Catholic schools and the archdiocese are doing for the community. This will reinforce Catholic school education is beneficial.
  - The marketing program will be coordinated, comprehensive, and long-term. It will segment the audiences and recognize regional preferences when they emerge: parents for purpose of enrollment, donors for purpose of funding, a non-Catholic constituency that supports Catholic education, and so on.
  - A brand concept with tagline and logo will be developed and will serve as the foundation for the marketing effort.
- 1.2 Identify a position within the Department of Catholic Schools with responsibility for assisting local schools to develop effective marketing programs. The person would also implement an archdiocesan marketing program that supports local efforts.
- 1.3 The archdiocesan marketing program will have sustained long-term funding and a consistent long-term message, since the impact of an effective marketing program is likely to become evident only after two to three years of consistent communication about the value and benefits of Catholic school education.

#### 2. Individual schools will implement focused marketing programs.

##### *Strategies*

- 2.1 Every school board and school advisory council will have a marketing committee. This committee will develop, implement and evaluate a marketing/recruitment/retention program at the local school level.
- 2.2 Every school will have a marketing plan. A key component of each marketing plan will emphasize the unique combination of faith and academics available in Catholic schools, as well as any unique religious charism or academic niche the school possesses. The plan will also have as its objective full enrollment at every grade level based on an objective measure of being fully enrolled. The plan will be submitted to the Department of Catholic Schools annually for review and feedback.
- 2.3 The local school budget will include a line item to fund local marketing initiatives. The level of funding will eventually increase to fully implement a complete marketing program.

- 2.4 The Department of Catholic Schools will serve as a resource for developing local school marketing plans and will provide leadership, direction, and assistance including templates to administrators and school boards in developing their plans.
- 2.5 Customer service training will be provided to receptionist and secretarial staff and other appropriate personnel to increase awareness of their respective roles in marketing the school and share best practices regarding communications and interactions with the public.
- 2.6 The availability of tuition assistance will be an important part of a recruitment campaign. The means of communicating cost of a Catholic education will be repackaged and the way tuition assistance is distributed will be rethought to align tuition assistance with enrollment goals.
- 2.7 Each member of the local school community will recognize and fulfill their role in building a positive image of the school in an effort to recruit and retain enrollment.
- 2.8 Every school will have its own website complete with a content management component to ensure that accurate and current information is maintained on a regular basis. Web sites will be integrated with social media.
- 2.9 Every school should be familiar with its competitors: public, private and cyber-school competition. They should visit their campus/web site, review current materials, attend an open house, and seek parent impressions.
- 2.10 Action plans will be designed to establish connections with Catholic families whose children are not yet of school age and with area pre-school programs.
- 2.11 Parents will be identified, invited and trained to serve as ambassadors for the school. These ambassadors will be actively involved in ensuring the success of the school's marketing and recruitment efforts.

**3. Immigrant students and students from local ethnic communities will be cultivated and welcomed into all Catholic schools in the archdiocese.**

*Strategies*

- 3.1 The Department of Catholic Schools will identify and collect best practices for enrollment efforts related to various immigrant and ethnic groups.
- 3.2 Schools with the potential to attract and enroll a significant number of immigrant and ethnic students will institute appropriate programs to support these students academically and culturally. In particular, these schools will provide ELL (English Language Learner) support to assist these students as they learn English. Culturally, these schools will consider in-school support for its immigrant and ethnic students (such as a Madrinias program for Latino students).
- 3.3 Schools will send representatives to appropriate workshops or training sessions, such as the Latino Enrollment Institute at the University of Notre Dame.
- 3.4 Schools with the potential to enroll immigrant and ethnic students will cultivate board members from that culture.
- 3.5 Schools will look to employ professional and support staff who are bi-lingual and will prepare marketing materials in the language of the immigrant and ethnic group as well as English.

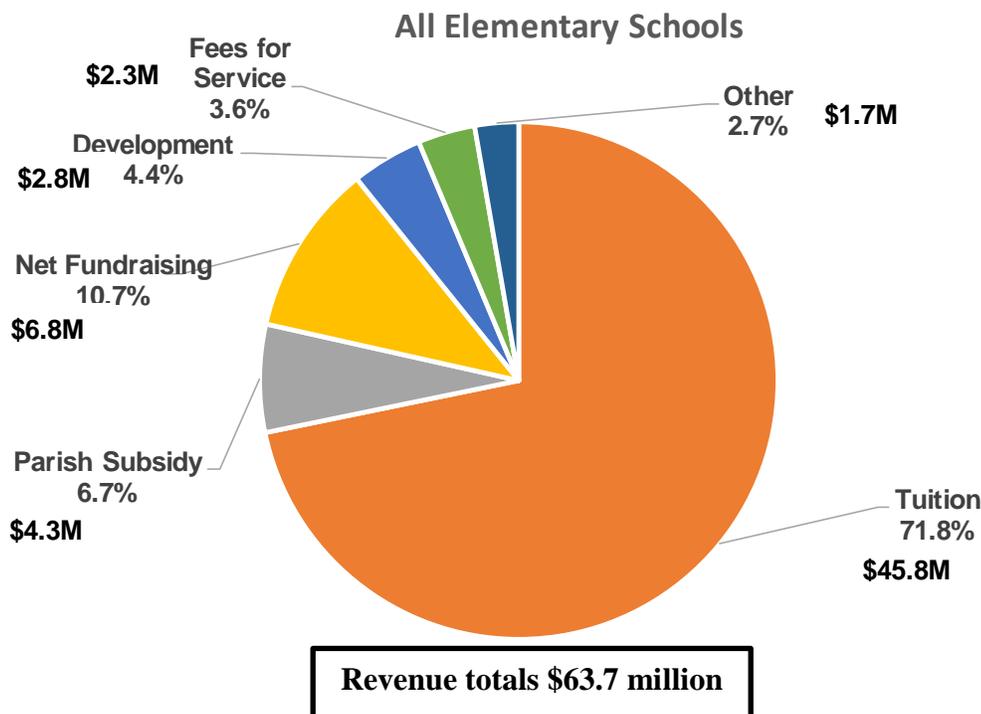
# V. CATHOLIC SCHOOL FINANCE

## Data and Observations

Financial resources are necessary to accomplish the mission. The funding model in Catholic schools in the Archdiocese of Portland has three primary funding sources: tuition, development/fundraising, and parish support.

Figure 1

2015-16 Source of Revenue  
Elementary Schools



Note: Source is Archdiocese of Portland in Oregon. Data for Catholic elementary schools. Private/religious schools and high schools are not included.

- Funding for Catholic schools depends primarily on tuition revenue, although tuition covers only 71.8% of the full cost of a Catholic education in Catholic elementary schools, in 2015-16.
- Over the past 5 years, the average annual tuition increase has been 3.5%. Average annual increases are generally in the range of 2% to 4.5%.
- For the three archdiocesan Catholic high schools, average tuition charged to parents represents 47.6% to 76.5% of the cost per pupil.<sup>1</sup>
- Parish subsidy represents 6.7% of all school revenue, totaling \$4.3 million in 2015-16. The investment from parishes is generally used to subsidize lower tuition rates for all families, and in a few cases, it is directed to financial assistance for families with need.

<sup>1</sup> Cost per pupil is calculated for Central Catholic High School, Marist High School, and Regis High School for 2015-16.

- e. The elementary school funding model currently is an institutional benefit model which is focused on the balance between revenue and expenses. A more effective approach is a child benefit model, which allocates funds into tuition assistance based on financial need. This model strives to give every child a Catholic education. It has the advantage of increasing revenue because more parents contribute tuition dollars based on what they can afford. It also has the advantage of increasing enrollments which makes the school more attractive and viable.
- f. Parishes without schools or not directly sponsoring schools currently provide some support. These parishes are expected to contribute \$1,020 per “qualifying” student to the receiving school. This is less than half the difference between tuition charged and cost. Subsidy formulas are not always followed or enforced from parishes without schools. There is no effective recourse for schools which do not receive the subsidy.
- g. Families apply for financial assistance by using the FACTS program to assess need. Close to 2,100 students are applying each year, and the number does not change much year to year. This represents 24% of K-8 enrollment.
- h. Assistance granted in archdiocesan Catholic schools comes from sources funded by development activities, foundations, parishes, the Archdiocese, the Joseph E. Weston Public Foundation, and other sources.
- i. There are several elementary schools that have successful advancement programs. Some schools have attempted to institute development functions, but with limited success. Fundraising appears to generate more revenue in elementary schools than development income.
- j. Salary scales are disaggregated into 4 zones based on county, school location, and population. The scales reflect the average salaries of the local public schools within each zone. These zones were determined 10 years ago by an outside consulting group.
- k. Across the four zones starting salaries for Catholic elementary school teachers range from starting salaries of \$26,000 to \$37,000 and ending salaries of \$38,000 to \$70,000.
- l. Across the 10 Catholic high schools in the Archdiocese, salaries for Catholic high school teachers range from starting salaries of \$23,000 to \$40,000 and ending salaries of \$58,000 to \$80,000.
- m. Out of 37 Catholic elementary schools, 18 (or 51%) currently pay 85% or higher of their zone averages and 17 (or 48%) pay less than 85% of their zone averages. Schools with the highest salaries are at 95% with the lowest being 70%.

## Goals and Strategies

1. **Every school will fund tuition assistance generously and administer it in a way that achieves enrollment goals and furthers the mission of the school.**

### *Strategies*

- 1.1 Every school will establish a tuition assistance budget. Funding will be directed to the budget from multiple sources: development activities like annual fund or events and special gifts, endowment proceeds, parish investment, archdiocesan grants, CSEF grants.
- 1.2 Schools need to articulate policies and procedures for the awarding of tuition assistance to ensure objective and equitable distribution of funds.

- 1.3 Utilize tuition assistance to keep the final cost to parents at a level they can afford and will allow them to access Catholic schools. Move a higher proportion of low and middle income families into the tuition assistance program. Become more sophisticated in administering tuition assistance.
- 1.4 Schools will begin planning for tuition assistance that does not have a specific funding source, in other words a discount from the published tuition rate. This discount will only be applied in the late spring and summer months when enrollment has stabilized and a significant number of empty seats remain within the staffing capacity. Only a portion of the empty seats, approximately 50%, would be made available for this discount in anticipation of full-paying students in future years.
- 1.5 Change the language from parish subsidy to parish investment. Begin to designate a portion of parish investment for tuition assistance.
- 1.6 Establish categories for tuition assistance where certain funds are designated for specific groups. This could be a family in a middle-income group who may even have some savings, not low income, but would struggle to afford Catholic school from current income. The strategy is to give tuition assistance across a wider spectrum of income.

## **2. Tuition will more closely reflect the actual cost of education.**

### *Strategies*

- 2.1 Determine accurately what the cost of education should be based on the goals of the archdiocesan strategic plan and local school strategic plan. This may be higher than the current cost. Insert controls for schools with consistently low enrollments and for schools with erratic enrollments.
- 2.2 Move tuition closer to desired cost by establishing 3 and 5 year goals.
- 2.3 Eliminate most fees as a separate charge and include them in the tuition. Make the first month tuition payment non-refundable and due before school starts. This will make cost to parents clearer, simplify billing, create consistency across schools, and improve cash flow.
- 2.4 As tuition increases, complement increases with good marketing that clearly communicates the distinct value of a Catholic education. Also, continuously improve the programs and services students and families receive for their tuition dollar.
- 2.5 An overview of the school budget and financial status of the school will be presented and explained to parents each year so they understand the true cost of education and see fiscal transparency. A thorough explanation will be provided of what tuition increases are funding and how students will benefit.

## **3. Parishes that sponsor Catholic schools will continue to provide 20% of parish offertory income as an investment in this ministry. Parishes investing less than 20% will increase their support.**

### *Strategies*

- 3.1 Schools will publish annual reports for parishes and all constituencies that support the school to show the value of their investment.
- 3.2 Parishes will work to enhance their culture of stewardship and discipleship with a comprehensive approach toward time, talent, and treasure.
- 3.3 All parishes, even those without children in Catholic schools, will support Catholic school education. Study how this contribution will be made to support this essential ministry.

#### **4. Compensation will increase, with the goal of attracting, retaining and rewarding employees.**

##### *Strategies*

- 4.1 New models for teacher compensation will be researched and thoughtfully considered for a pilot.
- 4.2 Each school will develop a multi-year financial plan to provide salaries at 85% or more of the salary zones published by the archdiocese.
- 4.3 While working toward increasing salaries, benefits will be reviewed and improved as needed to be competitive and care well for employees and their families.

#### **5. Every school will have an active advancement program.**

##### *Strategies*

- 5.1 Every school will create an advancement plan with specific goals, strategies, benchmarks and accountability. The advancement plan will be an extension of the schools' strategic plan.
- 5.2 Every school will identify a person in addition to the principal who is responsible for advancement. Preferably, the person is compensated. The advancement function will have clearly defined roles and responsibilities.
- 5.3 Schools will establish an accurate and updated database using current software.
- 5.4 Every school will have a detailed marketing and communications plan that supports advancement as well as marketing for enrollment.
- 5.5 Advancement programs will incorporate an effective program of annual giving including cultivating major donors.
- 5.6 Advancement programs will be expanded by including planned/deferred giving to promote endowment and long-term growth.
- 5.7 Within each school's governance structure, schools will have an active advancement committee to provide leadership and actively raise funds. These committees may take different forms depending on the size and organizational structure of the school. In some cases, a foundation may have been established and fulfills this function.
- 5.8 Administration, faculty, school governance, parish leaders, pastor, and staff will have an understanding and acceptance of their role in the advancement program.

#### **6. Continue to monitor school finances through the archdiocesan Department of Financial Services.**

##### *Strategies*

- 6.1 Develop a simple dashboard of key financial indicators that can be used by the Department of Financial Services to monitor financial health in schools in collaboration with the Department of Catholic Schools. Establish a regular reporting cycle.
- 6.2 The Department of Financial Services in cooperation with the Department of Catholic Schools should execute an intervention plan when schools fail to meet healthy viability criteria for finances.
- 6.3 The Department of Financial Services will review financial reports and improve their reporting format so they show key financial statistics for purposes of fiscal management.

**7. Catholic School Education Foundation (CSEF) will undertake a major gifts campaign with the full support of the archdiocese to build significant tuition assistance support for Catholic schools and to implement the strategic plan for Catholic schools.**

*Strategies*

- 7.1 CSEF will continue to develop a compelling case for support written in a more emotive manner and further refined by donors.
  - 7.2 CSEF will hire the necessary professional staff to help the foundation achieve its purpose and sustain the fundraising effort over a multi-year period.
  - 7.3 CSEF will follow a structured plan that engages the talents and skills of all board members. The plan will identify risks and specific strategies related to future foundation activities and a major fundraising campaign.
  - 7.4 CSEF will continue to develop its board with the right membership. The board will be engaged in planning and participate in appropriate board education.
  - 7.5 When CSEF has accomplished the preparations necessary, a major campaign will be conducted with the Archbishop's leadership to establish a significant pool of funds for tuition assistance. Consideration will be given to how other elements of the strategic plan might be funded through the campaign.
  - 7.6 Establish a close working relationship between the foundation and the Department of Catholic Schools. The Department of Catholic Schools should be consulted and involved in planning for initiatives/projects that could be funded by the foundation.
  - 7.7 Coordinate archdiocesan tuition assistance awards with local tuition assistance. Avoid letting archdiocesan assistance reduce incentives to fund assistance locally.
- 8. The archdiocese will provide resources necessary to support implementation of the strategic plan over time.**
- 9. Every school will have a master facility plan that provides for adequate maintenance and supports 21<sup>st</sup> century education.**
- 9.1 Standards will be established and a self-assessment tool provided for every school to complete.
  - 9.2 A master facility plan will be part of every school's strategic plan. It will include a capital funding plan; which can be a combination of annually putting aside cash into a capital reserve fund and capital fund raising.
  - 9.3 When parishes own facilities, school facility plans will be developed in a collaborative manner with the parish taking into consideration how facilities will support both parish and school goals.

## **VI. GROWTH AREAS AND NEW SCHOOL GROWTH**

### **Goals and Strategies**

1. Evaluate the need for Catholic school options along the coast. Consider a new model of multi-age education to accommodate smaller enrollments.
2. Undertake a comprehensive study of the potential for parish growth and need for new parishes. Determine where there are areas of the Archdiocese that may be underserved for the future and recommend the best pastoral model for parishes to serve future populations.

3. Plans for new Catholic schools should be coordinated with plans for parishes. If a Catholic school is to be the ministry of a single parish, then new parish plans should incorporate expanding Catholic schools.
4. Demographic trends indicate a need to evaluate the long-term potential for a new Catholic school in Washington County. Consider specifically the area leading southwest along the Scholls Ferry Road corridor.
5. Demographic trends indicated a need to evaluate the long-term potential for a new Catholic school in Clackamas County. Consider specifically the areas of Happy Valley and Wilsonville.
6. When parish plans are developed and before a Catholic school can be opened, a feasibility study should be conducted to determine the market demand and community support for a Catholic school. Factors to be considered are:
  - a. The level of parent interest in access to a Catholic school verses competing educational options.
  - b. The ability and willingness of parents to pay tuition.
  - c. The availability of existing facilities at parishes that could be used.
  - d. What type of school would be most viable in the marketplace and how would it distinguish itself beyond its Catholic identity.
7. Evaluate properties owned by the Archdiocese to determine if they are strategic for future parishes and schools. Purchase additional properties where long range needs are identified.

# APPENDIX A

## PARTNERS FOR EXCEPTIONAL LEARNERS

The Partners for Exceptional Learners Committee led a strategic planning process, which included the participation of parents, learning specialists, classroom teachers, school administrators, and Pastoral Center staff. The process identified the breadth and depth of services already provided in our schools, within a spirit of “what more can we do” to expand the inclusivity of schools within the Archdiocese of Portland. The approach asked: how can we better welcome families into our schools; communicate openly and compassionately with parents; grow our capacity to serve; and act within a spirit of justice?

### Goals and Strategies

**1. Each school within the Archdiocese of Portland under the direction of and in collaboration with the Department of Catholic Schools will develop processes to welcome and serve students with exceptional learning needs.**

#### *Strategies*

- 1.1 School staff members will be pastoral, utilizing available spiritual and educational resources to communicate with and assist parents in schooling decisions for their child.
- 1.2 Each school will have a designated Learning Support/Exceptional Learner Coordinator (job description is defined by DCS and training was provided in 2016) to be a point of contact for the Archdiocese and for prospective parents.
- 1.3 Local Catholic schools will work with resident public-school districts to identify students who may be eligible for special education services as if the child were to attend public school.
- 1.4 School personnel will participate in professional development related to meeting the needs of exceptional learners scheduled by DCS.
- 1.5 Principals and Learning Support Coordinators will receive professional development on the “Guidelines for Supporting Exceptional Learners,” including Learning Needs Profile, Admissions/Transitions Process Policies, Ongoing Assessment/Diagnosis Policies, Hiring/Training of Paraprofessionals, Safety/Aggressive Behavior Intervention Training, etc.
- 1.6 When hiring, each school will consider an applicant’s experience and training related to supporting exceptional learners.

**2. The Department of Catholic Schools will foster greater inclusion of exceptional learners.**

#### *Strategies*

- 2.1 Compile an “Areas of Expertise” database (list of current Learning Support Coordinators and their specialty areas, physical accessibility of schools, etc.). Keep this information in an online database and update annually.
- 2.2 Publish an annual updated catalogue/school report with the following services offered: accessibility, single-grade/combo classes, Learning Specialist (full or part), public transportation available, and pre-K program, before/after school care, school counselor, and special needs expertise area. This data should be kept in an online database and made available to both schools and parents.

- 2.3 Expand existing relationships with teacher education programs to include Special Education teacher prep, especially with the University of Portland.
- 2.4 Consider hiring a central Learning Support Specialist to coordinate student evaluations and the development of individualized student learning plans that will be implemented by the local school's Learning Specialist.
- 2.5 Include specific information about the inclusion of exceptional learners in the Department of Catholic Schools newsletters/annual report that promotes ongoing local school efforts and achievements.
- 2.6 Assess the feasibility and potential funding for a Learning Resource Center which could enable the Archdiocese of Portland to provide more intensive learning support at a centralized site.
- 2.7 Examine funding possibilities that allow for additional students with diverse learning needs to be served in our schools.