



BUILDING IN TRUTH AND LOVE

FINAL PLAN FOR CATHOLIC SCHOOLS IN THE DIOCESE OF ERIE

February 17, 2016



Prayer - Planning - Possibilities



February 17, 2016

Dear Sisters and Brothers in Christ:

I am pleased to present *Building in Truth and Love*, the plan for Catholic schools in the Diocese of Erie.

This bold plan for the future of our Catholic schools is built on a solid foundation of data, but also incorporates imagination and inspiration. It is the fruit of intensive prayer, study, feedback and collaboration by parents, educators and pastors. We now have a roadmap for faith-based academic excellence which is supported by our parishes and affordable for our families.

As we move ahead with this plan, there is still much work to do. The most important things won't change—prayer and sacramental celebrations for our children, commitment to service and personal attention in a family-like environment. Some things will change, but I ask that you join me in wholeheartedly committing yourselves to these initiatives and to our children, who are our hope for the future.

With every best wish I remain,

Sincerely yours in Christ,

+ Lawrence T. Persico

The Most Reverend Lawrence T. Persico, JCL
Bishop of Erie

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Key Indicators of a Healthy School for the Diocese of Erie

INTRODUCTION

“Young people are a valued treasure and the future leaders of our Church. It is the responsibility of the entire Catholic community – bishops, priests, deacons, religious and laity – to continue to strive toward the goal of making our Catholic elementary and secondary schools available, accessible and affordable to all Catholic parents and their children, including those who are poor and middle class.” *Renewing Our Commitment to Catholic Elementary and Secondary Schools in the Third Millennium, USCCB, 2005.*

Catholic education is a primary mission of the church, and Catholic schools are the most effective means the church has to form the minds and hearts of future generations. For the 2015-16 school year, the Diocese of Erie has 30 Catholic elementary/middle schools serving 5,712 students and 7 Catholic high schools serving 2,056 students. To ensure a stable and healthy future for Catholic schools and to strengthen these institutions to have an even greater impact on the church and society, the Diocese of Erie has developed a comprehensive strategic plan. This plan was developed as part of a larger planning effort for parishes and diocesan ministries called *Prayer, Planning, Possibilities*.

During the period from August 2014 until now the nationally recognized consulting firm of Meitler has been working with Catholic school leaders in the Diocese to form a new vision and practical plan that will move schools toward a desired future. The vision for the future is best captured in the key indicators for a healthy Catholic school. The plan is built around this vision.

The planning process included a number of opportunities for parish and school leaders to contribute to an understanding of the current state of Catholic education, offer ideas that would shape the plan, and respond to proposed goals and strategies. The preliminary plan was presented for response from Catholic school leaders on October 27, 2015.

To guide the development of the plan, a Catholic Education Task Force was established. They reviewed data gathered by the Catholic Schools Office and Meitler. Every school was visited in the Diocese and vital information was gathered from each of them. In addition, community demographics were collected and relevant parish data was compiled in order to create a complete picture of those trends affecting Catholic schools. This information was shared in multiple forums, and used by the Task Force to form an initial draft. Working subcommittees of the task force included a Finance Study Committee and groups looking at academic excellence and Catholic identity.

A special thank you to the Catholic Education Task Force for their leadership and vision. The members are:

Name	Affiliation	Location
John Davidson, Chairperson	Community Member	Sharon
Molly Bean	Tri-County Intermediate Unit	Edinboro
Phil Belfiore	Mercyhurst University	Erie
Tom Feeney	Parishioner, St. Boniface	Erie
Mark Jubulis	Gannon University	Erie
Mary Agnes Marshall	Elk County Catholic	St. Marys
Rev. Shane Mathew	Venango Catholic High School	Oil City
Very Rev. Phillip Pinczewski	St. Callistus Church	Kane
Very Rev. Msgr. Joseph Riccardo	Ss. Cosmas & Damian Church	Punxsutawney
Samuel Signorino	Diocese of Erie	Erie
Aaron Straub	Elk County Catholic	St. Marys
Jerome Wegley	Knox Law Firm	Erie

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I. MISSION AND CATHOLIC IDENTITY

OBSERVATIONS

1. The Catholic culture of the schools was very evident when the consultants visited the schools. A strong Catholic identity clearly makes Catholic schools unique from all others.
2. Among pastors with Catholic schools connected to their parish mission, most gave strong support for Catholic schools. Many pastors commented on the support from parishioners as well; although support is spotty in some parishes and widely embraced in others.
3. Visible symbols of the Catholic faith and traditions were evident throughout all of the schools.
4. While all of the schools provide sacramental opportunities for the students, the frequency of these opportunities varied, depending on the availability of clergy.
5. Schools are providing service opportunities and retreat experiences for students.
6. Daily prayer is a component of every school. While some schools start and end each day with an all-school prayer, other schools begin each class with a prayer.
7. School leaders told stories of families not only joining the parish because of the school but even having some family members enter RCIA.
8. Catholic schools foster a strong community for parents, often being described as family.
9. Schools are often a strong point in parish life.
10. All teachers of PreK-8 religion are required to be certified catechists. The Diocese provides a program for them to obtain this certification.
11. There are Religion curriculum guidelines for K-8, but they are described as outdated. High schools follow the USCCB standards for theology instruction.

GOALS AND STRATEGIES

1. The teaching of the Catholic faith with a focus on Jesus Christ and the integration of faith with daily living will be a hallmark of every Catholic school in the Diocese of Erie.

Strategies

- 1.1 Principals and teachers throughout the Diocese will be provided with assistance and guidance on integrating Catholic values and principles into the entire school curriculum.
- 1.2 A diocesan handbook will be created and regularly updated to assist teachers in their efforts to integrate Catholic identity into their classroom. The handbook will include references to specific resources, potential assignments and classroom activities.
- 1.3 New teachers will be hired not only for their teaching qualifications but also their desire to promote the Catholic mission of the school.
- 1.4 Each school will provide opportunities for daily prayer and regular participation in liturgy, the Sacrament of Reconciliation, retreats and other religious practices for students and staff.
- 1.5 Professional development opportunities will be provided by the Catholic Schools Office to train teachers on effectively integrating Catholic identity into their specific subject.

- 1.6 Each school will submit an annual report that summarizes Catholic identity activities and compliance with the Bishop's Expectations from the past year and identifies plans for the following year. Copies of these reports will be available to all schools as a means of identifying successful and innovative practices throughout the Diocese.
- 1.7 The diocesan web site will be used as a central source of information, celebration and feedback regarding the integration of Catholic identity into all aspects of school life.

2. All parishes in the Diocese will recognize and fulfill their responsibility to help carry out the ministry of Catholic schools and schools, in turn, will work closely with parishes in the work of evangelization.

Strategies

- 2.1 Best practices for establishing, maintaining and strengthening connections between schools and area parishes will be identified and communicated.
- 2.2 Research and information on the effect of Catholic school education on vocations, adult religious practices, parish participation and parish financial contributions will be gathered and reviewed. This information will be utilized in developing talking points and stories which will be used to educate priests and parishioners about the importance and value of Catholic schools.
- 2.3 Schools will invite and identify ways to encourage area clergy in addition to those on-site to contribute to the sacramental life and religious formation of students.
- 2.4 Schools will communicate the expectation that parents will be actively involved in the religious formation of their children and be participating members of their parish or faith community. Schools will work with parishes to facilitate this and other opportunities for evangelization.
- 2.5 Schools will collaborate with diocesan agencies in identifying ways to heighten awareness of vocation as a call and to increase student understanding of the richness of vocations to the priesthood, single, married and religious life.
- 2.6 The Bishop and the Episcopal Vicars will regularly promote the importance of Catholic education for the Church in general and, in particular, in the Diocese of Erie. In turn, all pastors, clergy and parish leaders will be expected to verbally support Catholic schools and actively encourage parishioners to consider enrolling their children in Catholic school.

II. GOVERNANCE AND LEADERSHIP

A. Overall Governance

OBSERVATIONS

1. There are multiple forms of governance among schools in the Diocese.
 - Twenty-one elementary schools operate in a parish model with Advisory Councils. The councils are advisory to both the pastor and principal. Some councils are delegated significant responsibility but most are not.
 - Two elementary schools fit a model of multi-parish sponsorship (Our Lady's Christian and Seton Catholic).
 - One elementary school is sponsored by a Religious Order (Villa Maria Elementary).
 - There are three school systems that combine elementary, middle and high schools: DuBois Area Catholic School, Elk County Catholic School System and the Kennedy Catholic Family of Schools. All three are governed by boards of limited jurisdiction with final authority resting with the Board of Members chaired by the Bishop.
 - There are three high schools in the Diocese that are not part of a system. Two are owned by the Diocese (Erie Catholic Preparatory, composed of Cathedral Preparatory and Villa Maria Academy, and Venango Catholic High School) and one high school sponsored by a Religious Order (Mercyhurst).
2. Mercyhurst Preparatory School and Villa Maria Elementary School are owned and operated by Religious Orders and governed independently by boards of limited jurisdiction with final authority resting with the Religious Community.
3. In parish-based schools, it is common for the pastor, who holds final authority, to delegate authority for running the school to the school principal. A few pastors are entangled in the daily operating decisions of schools, sometimes weakening the role of principal and squelching creative, forward-looking ideas.
4. In many schools, there is a lack of accountability for school finances and various diocesan rules and regulations.
5. The success and strength of school governance is directly connected to the competency and leadership of people serving on boards and councils. Many members are excellent and bring their expertise, wisdom, and vision to school governance. Clearer criteria and high standards need to be more consistently applied in the recruitment and selection process for new board and council members.
6. There is very little professional development for boards and minimal articulated expectations of board members.
7. Compensation for principals and other school administrators is significantly below professional counterparts in public schools. Compensation is often determined by the pastor without an objective standard.
8. Principals who come to Catholic schools after retiring from public schools are competent, experienced, and often faith-filled. However, a challenge for principals new to Catholic education is to understand the nuances of Catholic identity and the broad range of areas needing leadership that are unique to being a private, Catholic school.

9. The Diocese has a Vicar for Education, who oversees the Office of Education, which supports elementary and secondary schools and is organized into four areas, each served by a Director: Catholic Schools and School Personnel; Curriculum; Government Programs; and School Finance. The Diocese does not have a Superintendent for Catholic Schools.

GOALS AND STRATEGIES

1. The Catholic Schools Office will be given a leadership role for Catholic schools in the Diocese.

Strategies

- 1.1 The Catholic Schools Office will be given authority for overseeing areas such as:
- the process surrounding principal selection
 - the creation and maintenance of system boards and individual school advisory councils
 - the professional development of board and council members, school administrators and faculty
 - the development and implementation of strategic planning.
- 1.2 The position of Superintendent of Schools will be created with clearly delineated area of responsibility and authority.
- 1.3 A staff position relating to school advancement will be created (see Advancement, Goal 1).
- 1.4 A staff position relating to marketing and student recruiting will be created (see Enrollment Management, Goal 1).

2. School systems, both existing and new, will function within a uniform set of guidelines.

Strategies

System Governance

- 2.1 Systems of schools will be separately incorporated and governed using a two-tiered board structure. The Board of Members, the first tier, will have designated reserved powers in areas such as mission, Catholic identity, appointment of directors, and other areas. Its membership will be determined by and will include the Bishop.
- 2.2 The Board of Directors, the second tier, will have delegated authority and responsibility for the operation of the system (strategic planning, finances, policy development, academic quality, institutional advancement, marketing/recruitment, etc.). The Board of Directors will be selected from area clergy and laity who have specific expertise and commitment to the mission of Catholic education. The superintendent or a designee will be an ex-officio member of the board. The overall process and criteria for selection along with terms of service will be established through the development of bylaws.
- 2.3 Bylaws will be updated to meet a uniform set of guidelines and approved by the Board of Members in each system.
- 2.4 Diocesan school policies and reporting systems will be updated to accommodate the unique nature of a school system versus a parish school. The systems will be required to follow all diocesan school policies established by the Catholic Schools Office.

- 2.5 The system Board of Directors will establish written building-use agreements with the parishes that own the facilities used by the system.
- 2.6 The administration and boards in school systems will have accountability in specific areas to the Catholic Schools Office.

Connection to Parishes

- 2.7 Involvement of pastors and connectedness to parishes will be a high priority and distinguishing characteristic of the system. The system leadership must constantly be proactive in fostering the parish relationship.
- 2.8 Pastors will be regularly informed of the activities of the system, will receive regular financial reports and will be asked to give input to system goals and direction. A system report will be an ongoing agenda item for deanery meetings.
- 2.9 Pastors and clergy members of the Board of Directors will provide guidance to the Catholic identity of the schools and the faith formation program.
 - a. Area clergy will provide spiritual care and sacramental opportunities for students and faculty.
 - b. An agreement regarding preparation for first sacraments will need to be determined by the pastors from the supporting parishes.
- 2.10 Catholic students and their families will be expected and encouraged to actively participate in their home parishes. Appropriate school-sponsored service projects will involve local parishes and be an extension of parish mission.
- 2.11 Schools will actively work with parishes to be vehicles of evangelization for students and their families
- 2.12 Area pastors and parish staff will promote the value of a Catholic school education and encourage parents to enroll their children.

Fiscal Operation

- 2.13 The system will operate with central finance overseen by a business manager and finance committee of the Board of Directors. Responsibility for fiscal integrity and accountability will rest with the system president and the Board of Directors.
- 2.14 Financial reporting will be done quarterly with reports sent to the Diocese.

Advancement

- 2.15 The system president, in collaboration with the Board of Directors, will ensure an advancement office is fully functioning with a capable Director of Advancement and an active committee structure of the board.

3. Parish schools and multi-parish schools will consistently function within a uniform set of guidelines.

Strategies

- 3.1 All parish school advisory councils will conform to the bylaws prescribed by the Catholic Schools Office. Variations may be allowed in certain circumstances only with the approval of the Catholic Schools Office.
- 3.2 A Diocesan Handbook for Parish School Advisory Councils will be created to establish a uniform set of guidelines. The Diocesan Handbook for Advisory Councils will delineate the relationship and role of the school board with other councils within the parish; specifically the parish finance council and parish pastoral council.
- 3.3 Where school councils are functioning but not in agreement with the guidelines given in the Diocesan Handbook for Parish School Advisory Councils, a review will be conducted by the Catholic Schools Office with the school, and recommendations made about needed changes.
- 3.4 A program of orientation and in-service will be required annually and will be overseen by the Catholic Schools Office. Orientation will be expected of all school advisory councils, pastors with parish schools or pastors involved with governance of schools, business managers, and school administrators. Various options and formats for orientation will be developed.
- 3.5 When it is necessary to assign a new pastor, the governance structure of the school will be shared with potential pastor candidates by the Catholic Schools Office and Priest Personnel Board to ensure they understand the situation they will enter into and they will be supportive of the established governance structure.
- 3.6 When a new pastor is assigned to a parish with a parish school or a parish involved with a multi-parish school, the principal and local school advisory council will meet with him to review the governance structure of the school, including its bylaws. The Catholic Schools Office will also consult the pastor to ensure the pastor has a current working knowledge of school governance, diocesan policy, and procedure.

4. Parish school advisory councils will be delegated responsibilities by the pastor in limited areas.

Strategies

- 4.1 Principals and pastors will be trained in how to establish and utilize school advisory councils for parish schools.
- 4.2 The pastor will delegate specific responsibility to the school advisory council areas as delineated in the bylaws. Responsibilities may be delegated progressively where councils are new or not fully formed. However, progress must be demonstrated toward developing an effective school advisory council and recruiting the right talent for membership. The school advisory council will be authorized by the pastor to make decisions in the specific areas as long as they are consistent with the mission of the school and parish, in the best interest of the school and parish, and in keeping with diocesan policy/guidelines. The pastor's advice is sought when the council is in the process of making decisions so that the pastor is informed and given the opportunity for input. The council will provide an appropriate explanation and rationale for major decisions to the pastor. If the council decision is not in keeping with the bylaws of the advisory council and/or does not meet the

criteria as stated above, the pastor may exercise his canonical authority and change the decision; however, this is intended to be an exception rather than the norm.

- 4.3 Areas where delegation would be appropriate include developing strategic plans, establishing some school policies, setting tuition, recommending salary scales and salary increases and preparing budgets. Areas where delegation would not be appropriate include final budget approval, hiring/firing the principal, personnel matters, facility renovation or relocation, etc. The advisory council may make recommendations in these areas but not exercise final authority.

5. School system boards will follow best practices.

Strategies

- 5.1 Local school board members will be selected through a consistent process of establishing criteria, nomination, discernment and appointment for a tenure not to exceed six years of consecutive board service. This process will be documented in the bylaws for the school board. Criteria for board membership will be established with an emphasis on specific expertise (finances, education, law, facilities, marketing, etc.), leadership in the community, and commitment to the mission of Catholic education.
- 5.2 Boards are strongly encouraged to have at least half and, when possible, more of the board membership not be parents of current students. When a school serves a wider region or has a notable non-Catholic enrollment, qualified candidates should be invited from these groups.
- 5.3 Boards will operate with a strong committee structure, utilizing non-board local community persons in addition to board members. Committees should minimally include Executive, Mission, Academic, Finance, Facilities, Personnel, Advancement and Marketing.
- 5.4 A program of orientation and in-service will be required annually and will be overseen by the Catholic Schools Office. Orientation will be expected of all school boards, business managers, and school administrators. Various options and formats for orientation will be developed.
- 5.5 Bylaws and delegated responsibilities of local school boards will be reviewed every three to five years. Adjustments can be made as long as they are in compliance with the guidelines of the Diocesan Handbook for Boards, receive the approval of the Catholic Schools Office and receive final approval from the Members.

6. Each principal or head administrator will be a well-qualified and competent leader.

Strategies

- 6.1 The Catholic Schools Office will develop a clear set of criteria and expectations for the Catholic school principal or head administrator and communicate these to local school boards, pastors and school administrators.
- 6.2 The Catholic Schools Office will create a principal selection procedure. The Catholic Schools Office will be directly involved in the process. Principal candidates will meet qualifications stipulated by the Catholic Schools Office. Prior to being interviewed or hired at the local level, all candidates will be prescreened through the Catholic Schools Office. Prior to being hired the school must obtain the specific approval from the Catholic Schools Office.

- 6.3 The Priest Personnel Board will include consideration of a priest's abilities to oversee a school when assigning a pastor to a parish with its own school.
- 6.4 Pastors with schools will be expected to fully comply with all policies and procedures regarding principal hiring, termination, non-renewal and evaluation as outlined in the Policies for Catholic Schools. Any concerns regarding non-compliance will be directed to the Bishop of the Diocese for review and resolution.
- 6.5 Professional development of school principals will be directed by the Catholic Schools Office.
- 6.6 A multi-year plan to increase principal compensation will be developed by the Catholic Schools Office.
- 6.7 The Catholic Schools Office will work with the system boards and the parish school advisory councils to develop and regularly update a succession plan for key administrative roles in the school. Opportunities for training, education, and work experiences will be included in the succession plan in order to prepare potential candidates for future leadership positions.

7. Every school will have a comprehensive, multi-year, strategic plan. Every school will be guided by its plan, using it to inform all decision-making.

Strategies

- 7.1 The plan will follow a diocesan template designed by the Catholic Schools Office and organized around national standards and benchmarks. It will align with Middle States accreditation.
- 7.2 The process to develop and update the plan will engage local school board or advisory council, parents, principal and pastor team, faculty, sponsoring parishes, and current/future donors.

B. Organization and Structure of Schools

Northern Vicariate

Figure 1

Enrollment Trends – Northern Vicariate

VICARIATE/County		Grades								Change 09-10 to 15-16	
Town	System/School		09-10	10-11	11-12	12-13	13-14	14-15	15-16	Number	Percent
NORTHERN VICARIATE											
Erie County											
Corry	St. Thomas <i>(closed)</i>	PreK-6	62	69	64	68	72	40		-62	
Erie	Blessed Sacrament	PreK-8	424	412	399	458	434	430	415	-9	-2%
Erie	Erie Catholic Preparatory School										
	Cathedral Preparatory	9-12 (boys)	555	582	549	581	554	547	559	4	1%
	Villa Maria Academy	9-12 (girls)	298	303	301	323	329	373	373	75	25%
	Subtotal Erie Catholic Preparatory School		853	885	850	904	883	920	932	79	9%
Erie	Holy Family	PreK-8	104	107	85	114	117	126	109	5	5%
Erie	Mercyhurst Preparatory High	9-12	595	597	624	617	575	545	542	-53	-9%
Erie	Our Lady of Mt. Carmel	PreK-8	191	174	148	154	149	154	154	-37	-19%
Erie	Our Lady of Peace	PreK-8	456	442	425	413	417	421	469	13	3%
Erie	Our Lady's Christian	PreK-8	426	408	365	334	342	343	355	-71	-17%
Erie	St. Boniface	PreK-4	99	111	89	90	85	33	53	-46	-46%
Erie	St. George	PreK-8	566	513	517	520	524	491	472	-94	-17%
Erie	St. James	PreK-8	254	251	245	252	246	241	244	-10	-4%
Erie	St. John-Holy Rosary Eastside <i>(closed)</i>		160	153	122					-160	
Erie	St. Luke	PreK-8	365	346	365	390	397	411	394	29	8%
Erie	St. Peter Cathedral <i>(closing in June 2016)</i>	PreK-8	278	282	258	262	208	184	148	-130	-47%
Erie	Villa Maria Elementary	PreK-8	320	341	355	378	394	406	413	93	29%
North East	St. Gregory	PreK-8	88	76	85	73	72	74	87	-1	-1%
Warren County											
Warren	St. Joseph	PreK-5	73	80	97	109	125	134	133	60	82%
Total Northern Vicariate			5,314	5,247	5,093	5,136	5,040	4,953	4,920	-394	-7%
Total Diocese			9,051	8,770	8,494	8,429	8,199	7,961	7,768	-1,283	-14%

Source: Diocese of Erie

OBSERVATIONS

1. St. Thomas School in Corry closed at the end of the 2014-15 school year.
2. In 2015-16, there will be thirteen Catholic elementary schools in the vicariate, one of which is owned and operated by the Sisters of St. Joseph. There are three high schools in the vicariate, a co-educational secondary school owned and operated by the Sisters of Mercy and a co-institutional secondary school made up by an all-boys school and an all-girls school.
3. From 2009-10 to 2015-16, the elementary schools experienced an overall enrollment decline of 9%. Five elementary schools increased their enrollment during this time, although the increase was minimal for one of them. The diocesan high school increased its enrollment, although most of the increase occurred in the girls' school. The private Catholic high school enrollment declined 9% in the time frame.
4. Total elementary school enrollments range from two schools below 100 students in 2015-16 (one is a PreK-4) to four schools with over 400 students. Four elementary schools have between 100 and 200 students (one is a PreK-5) and the final three schools have between 200 and 400 students. Generally, an elementary enrollment of 200 students in grades Pre K through 8 is needed to ensure sufficient funding, resources and educational program variety.

5. The three Catholic high schools all have healthy enrollments. Cathedral Prep, an all-boys diocesan high school, has maintained an enrollment around 550 students since 2009-10. Villa Maria, an all-girls diocesan high school, has seen enrollment increase since merging with Cathedral Prep, increasing 25% since 2009-10. Mercyhurst Preparatory School, a co-educational school sponsored by the Sisters of Mercy, generally maintains an enrollment of around 600 students, although there was a dip to 542 students in 2015-16.
6. Infant baptisms declined 45% in the Northern Vicariate and the number of people receiving First Eucharist declined 33% between 2004 and 2014.
7. School capacity percentage, based on the number of students a school is staffed to serve, is a critical statistic in determining a school's health and the need for more or fewer classrooms in a geographic area. Ideally, a school will operate at 85% or above of its staffing capacity. In 2015-16, only one elementary school is operating at 85% capacity or above – Our Lady of Peace School at 103%. Overall elementary school capacity in the vicariate in 2015-16 is 69%. In 2015-16, all three of the high schools in the vicariate are operating at or above 90% capacity.
8. The average class size for grades K to 8 in the vicariate in 2015-16 is 17 students, well below the financially desirable 22-24 students.
9. Villa Maria Elementary School may lose its current school building and campus. It is unclear where and when the school might move to a new location.
10. While most schools in the City of Erie have experienced enrollment declines recently, east side schools are typically much smaller than west side schools and operate at a lower percent of capacity.
11. Using status quo trend projections for future enrollments five years from now (i.e. not accounting for changes in demographics, marketing practices, etc.), only Holy Family School and Our Lady of Peace School are projected to have an increase in students. Our Lady of Mt. Carmel School and St. James School are projected to maintain enrollment numbers similar to 2015-16 while the other five schools (St. Luke, St. George, Our Lady's Christian, Blessed Sacrament and St. Peter Cathedral), are all projected to have declining enrollments. At the extremes, Our Lady's Christian's K to 8 enrollment is projected to decline by 27% by 2022-23 and St. Peter Cathedral's decline is projected to be 52%.
12. St. Peter Cathedral School's enrollment is projected to decline to below 100 students, while Our Lady of Mt. Carmel is projected to remain around 115 students. These enrollments threaten each school's financial and academic viability. Recently, St. Peter Cathedral Parish acknowledged significant financial difficulty in maintaining the school and the decision was made to close the school in June, 2016.
13. Our Lady's Christian School is the only west side school projected to lose a significant number of students in the next 5 years and approach an enrollment of 200.
14. St. Gregory School's 87 students in 2015-16 occupy 40% of the school's capacity. Total enrollment has remained in a range of 72 to 88 students since 2009-10.

15. Parish statistics for St. Joseph in Warren and St. Gregory Thaumaturgus in North East are shown below.

Parish	Town	Religious Education Elem. Enr. 2013-14	Infant Baptisms			First Eucharists ¹		
			2003-04	2013-14	10-Year % Change	2003-04	2013-14	10-Year % Change
St. Joseph	Warren	65	16	13	-19%	36	27	-25%
St. Gregory Thaumaturgus	North East	143	30	17	-43%	45	29	-36%

¹ Includes children, adults, RCIA

Source: Diocese of Erie

16. Public school district enrollment trends for Warren and North East are shown below.

County School District	K-5 Enrollment			6-8 Enrollment			9-12 Enrollment		
	2008-09	2013-14	5-Yr Change	2008-09	2013-14	5-Yr Change	2008-09	2013-14	5-Yr Change
Warren County									
Warren County	2,244	1,930	-14%	1,176	1,119	-5%	1,790	1,525	-15%
Erie County									
North East	696	779	12%	431	383	-11%	654	486	-26%

Source: Pennsylvania Department of Education

SITUATION OVERVIEW

1. The school-age population in the vicariate is projected to remain relatively stable (+/- 5%) between 2010 and 2030.
2. There is a greater concentration of registered Catholic families and middle and upper class families in the Erie West Deanery. All of the census tracts with median incomes below \$25,000 are in the central city and the east/northeast section of the city.
3. The 16 parishes in the Erie West Deanery reported 13,333 registered households in 2013-14 while the 17 Erie East Deanery parishes reported 9,723 households. The west side parishes with schools had 9,165 households in 2013-14 while the east side parishes with schools had 5,589 households.
4. Our Lady of Mt. Carmel School is at risk of closing due to enrollment below 200 students and a pattern of declining enrollments. St. Peter Cathedral School is closing in June, 2016, in part due to an enrollment below 200 students.
5. St. Boniface School has 28 students in the Pre K program, but only 25 in grades K-3. It shares a Principal with Our Lady of Mount Carmel School. Located in a rural area with no municipal sewer or water service, the prospects for increased population is slim.
6. Holy Family School is projected to increase its enrollment between 2014-15 and 2019-20, yet its classes are expected to mostly remain below 90% of capacity.
7. In 2015-16, the five PreK-8 schools in the Erie East Deanery have a capacity for 1,521 students and 954 students enrolled. (63% capacity).
8. In 2014-15, the five PreK-8 schools in the Erie West Deanery have a capacity for 2,648 students with 2,124 students enrolled (80% capacity).

RECOMMENDATIONS

1. Create a single school system for grades PreK-8 in the Greater Erie Area, with a target to open for the 2017-2018 school year.

Strategies

1.1 The new school system will be established with an exciting vision for stronger schools, including an attractive brand, outstanding programs, and superior opportunities for students in grades PreK-8. The system will include 6 campuses, each site hosting a PreK-5 and an embedded 6-8 middle school program in the same building. The following independent parish-based schools in the Greater Erie Area will be transformed and reopen as part of a new integrated Diocesan system. The campuses being used include:

- Blessed Sacrament
- Our Lady of Peace
- St. Jude (Our Lady's Christian School)
- St. George
- St. James
- St. Luke

St. Boniface School and Our Lady of Mount Carmel School will remain open until the new system is created and begins to welcome students. Villa Maria Elementary School will not be used as a campus for the new system but remain a school sponsored by the Sisters of St. Joseph. St. Peter Cathedral School has already announced closure at the conclusion of the 2015-2016 school year. St. Gregory School in North East and St. Joseph School in Warren will continue as parish-based schools. Holy Family will be transformed into a separately incorporated Diocesan school (see Goal 2).

1.2 The school system will be governed by a two-tiered board structure that conforms to the guidelines as presented in Governance, Goal 2.

1.3 A vision and mission for the new system will be established. This will be the first task of a newly organized Board of Directors.

1.4 The system will be managed by a president who will provide leadership, coordination and oversight for the functioning of the system with the support of a skilled administrative team including campus principals.

- a. Initially, selection of the president will be made in conjunction with the Catholic Schools Office. Once the system has been established, selection of future presidents will be based on the recommendation of the Board of Directors and the approval of the Board of Members.
- b. The Catholic Schools Office will develop a job description for the position of the president and will oversee the president regarding operational matters related to diocesan policy.
- c. The president will be responsible for the day-to-day administration and operation of the system. The president will be a champion for the system in the community and will have an active role in strategic planning and fundraising.
- d. The president will be responsible for the selection and supervision of campus principals and office staff within the system in accordance with diocesan policy.

- e. The president will facilitate cooperation and communication among the system, including Board of Directors, principals, pastors, sponsoring parishes and the Catholic Schools Office.
- 1.5 The school system administration will include trained professional staff to address critical functions for the system such as advancement, marketing and financial planning.
- 1.6 Each campus will have its own parent organization which will advise the principal and support local school projects.
- 1.7 A funding plan will be developed to update the embedded middle school at each of the 6 campuses.
- 1.8 While honoring the history and traditions of each parish school, every effort will be made to identify the system campuses as new entities with different governance.
- 1.9 The system will receive financial support from 32 of the 33 parishes in the Greater Erie Area according to an agreed-upon equitable formula developed in collaboration with pastors of the sponsoring parishes and the Diocesan Finance Office. St. Gregory School in North East will continue as a parish-based school.
- 1.10 The Catholic Schools Office will work with current parish-based schools to encourage enrollment in the new system when the change comes about.
 - a. 1.11 A year of planning is necessary before reorganizing schools into a system. A leadership team including the Catholic Schools Office staff would be assembled to lead the transition. Working groups under the leadership of a Board of Directors would be very active in the process.
 - b. 1.12 The embedded middle school program must be closely tied with the high schools. Loyalty of parents to a Catholic brand of education will be stronger keeping students in Catholic schools through 12th grade, and the readiness of students for high school will be even higher than before.

Rationale and Opportunities

- a. A school system, which combines resources and allows for the addition of specialty courses, provides opportunities to improve both academic and marketing/recruitment programs.
- b. A school system allows for efficiency of operations, such as business functions, purchasing, and human resources.
- c. Embedded Catholic middle schools (within the Pre K-8 buildings) with a rigorous academic program and facilities will attract students from local public schools.
- d. A robust middle school program, embedded within each PreK-8 campus, will present multiple opportunities for Catholic middle school students such as:
 - Increased Catholic identity with a variety of age-appropriate spiritual experiences
 - Occasions for students to serve and lead within the school and community
 - Opportunities for students to build relationships with adults in the schools
 - STEM integration across the curriculum with lessons
 - on real world issues and problems
 - guided by the engineering design process
 - that immerse students in hands-on inquiry and open-ended exploration

- that involve students in productive teamwork
 - applying rigorous math and science content
 - that allow for multiple correct answers and the reframing of failure as a necessary part of learning
 - A learning environment aligned with the developmental stages of middle school students
 - An age appropriate and consistent code of conduct
 - Emphasis on career education and exploration within the community
 - Opportunities for students to develop a high regard for personal wellness
 - Activities which offer students physical movement, a healthy sense of competition, and chances to interact socially
 - Improved preparation for high school
 - Opportunities to learn international languages and develop talents in the arts
 - Updated Science labs and redesigned Media centers
- e. There presently is excessive capacity in the existing elementary schools in the Greater Erie Area, with close to 1,000 empty seats. Too many classrooms in these schools are populated by fewer than 20 students.
- f. The health of Cathedral Preparatory School, Mercyhurst Preparatory School, and Villa Maria Academy are dependent on a strong Catholic elementary school feeder system.
- g. Status quo trend projections suggested that St. Boniface School, Our Lady of Mt. Carmel School and St. Peter Cathedral School would experience continued enrollment declines to the point where their viability would be threatened.
- h. Blessed Sacrament School, St. George School and Our Lady of Peace School each have enrollments above 350 K-8 students, but face long-term issues with enrollment and finances.
- i. While St. James School, St. Luke School, and Our Lady's Christian School are projected to maintain viable enrollments, they, too, are expected to experience some enrollment decline, contributing further to the excessive capacity.
- j. The Sisters of St. Joseph have decided to sell the Villa Maria Elementary School site. More recently however, they have rejected all proposals related to the sale of the property.

2. Reorganize Holy Family School from a parish school into a separately incorporated diocesan school serving grades Pre-K through 8.

Strategies

- 2.1 Convene a select group of community leaders who are passionate about the special mission of the school serving the city's poor and are committed to the school's success to help plan for the transition. Their relationship can be continued through representation on the board, involvement in development, and involvement with the school.
- 2.2 Complete a feasibility study to determine the need, interest, and the ability of the Greater Erie community to support an urban school. If the study indicates that an Urban School can succeed in the Erie Area, proceed with implementation as follows.
 - a. Establish the school as a separate corporation and create a two-tiered board structure with a Board of Members and a Board of Limited Jurisdiction.
 - b. The Catholic identity and pastoral leadership for the spiritual program of the school will continue to be strongly supported by the pastors of nearby parishes.
 - c. Establish a foundation specific to the mission of the school with a foundation committee of the board that will direct its advancement efforts. Consider the advantages of creating a position for an Advancement Director.
 - d. Study the feasibility of moving the school into a more modern and better equipped building within the same area.
 - e. Create a five-year comprehensive strategic plan with specific benchmarks for enrollment, advancement program, school finances, and academic program enhancements. The outcome should be an outstanding Catholic school option for people living in a disadvantaged area of Erie.
 - f. Establish expectations that Holy Family students will continue enrollment in a Catholic High School after completion of the 8th grade. Provide transportation assistance when possible and investigate the possibility of providing tuition assistance to Holy Family students enrolling in Catholic secondary schools.

Rationale

- a. Holy Family School is the only school in the City of Erie that serves a predominately minority student population. Its students receive considerable tuition assistance.
- b. The supporting parish, Our Mother of Sorrows, is comprised of three churches with minimal memberships: Holy Family Church with 150 families, St. Ann Church with 300 families and St. Casmir Church with 200 families. The supporting parish has budgeted between 45% and 64% of its ordinary income as school subsidy since 2009-10, and has additionally covered school budget deficits in those years of up to \$23,000. It is unlikely this parish can continue to support the school to the degree necessary to ensure viability.
- c. Establishing the school as a separate corporation with a governing board will make the institution more attractive to foundations and major donors. It will increase the possibility that the school can be successful for the long term.

3. The Diocese of Erie will continue ongoing discussions with the Sisters of St. Joseph and the Villa Maria Elementary Board of Trustees regarding the future of the school.

- 3.1 The Sisters of St. Joseph will maintain sponsorship of Villa Maria Elementary School until further notice. At this time, Villa Maria Elementary School will remain on the current campus.

Rationale

- a. The Sisters of St. Joseph have begun procedures to sell the property on which Villa Maria Elementary is located.
- b. If Villa Maria Elementary relocated from its current campus under the ownership of the Sisters, the Diocese will be very interested in the new location and its effect on existing Catholic elementary schools.
- c. The Sisters may not have the personnel necessary to maintain sponsorship of the school and are aware of the tremendous success of Villa Maria Academy as a diocesan high school.
- d. Bishop Persico has indicated his expectation that Catholic schools be sponsored either by the Diocese or religious communities to ensure Catholic identity.

4. Cathedral Preparatory School, Villa Maria Academy and Mercyhurst Preparatory School will develop a supportive affiliation to increase the number of students in Erie County attending Catholic secondary schools.

Strategies

- 4.1. Schools will be tasked with developing strategies to promote the choice of a Catholic secondary education in a manner that does not harm one another's good name and reputation and advances the evangelization of youth.
- 4.2. The Catholic Schools Office will facilitate ongoing roundtable discussions with the three schools to identify means for strengthening the affiliation and action steps necessary for accomplishing 4.1.
- 4.3. The three schools will develop a timeline for accomplishing strategies that is reviewed annually with the Catholic Schools Office.
- 4.4. Competition between the schools will be healthy, allowing for the uniqueness of each campus, and having as its goal a greater number of families choosing Catholic education.

5. Maintain St. Gregory School in North East as a PreK-8 parish school.

Strategies

- 5.1 Create a comprehensive strategic plan which includes strategies to continue and strengthen the relationship with Mercyhurst University and which sets achievable goals to increase enrollment to a financially viable number.
- 5.2 Identify opportunities and strategies to enhance the overall academic program and distinguish the school from the local public elementary school. Provide appropriate resources to ensure the success of the program.
- 5.3 Participate in the parish-based school Diocesan collaborative (see Academic Excellence, Goal 2) as is appropriate. However, because of the proximity to the Erie Catholic school

system as well as the Catholic high schools, it is very important that St. Gregory School work closely with the Erie Catholic school system.

Rationale

- a. St. Gregory School in North East serves a predominately rural community in the northernmost corner of the Diocese. The only other non-public schools in the area closed recently, leaving St. Gregory as both the only Catholic school and the only private school alternative.
- b. The community has a healthy public school serving students PreK-12. Enrollment in the North East public K-5 school increased by 12% between 2008-09 and 2013-14.
- c. St. Gregory School has a close relationship with Mercyhurst University and provides teaching opportunities for Mercyhurst graduate students. While helpful for the college students, this arrangement also provides economies for the elementary school.

6. Maintain St. Joseph School in Warren as a PreK-5 parish school.

Strategies

- 6.1 Create a comprehensive strategic plan which includes a feasibility study to expand the school to grade 6 in the short term and to grade 8 long term.
- 6.2 Ensure the continued presence of high quality leadership in the principal's office after the current principal retires.
- 6.3 Participate in the parish-based school Diocesan collaborative (see Academic Excellence, Goal 2).

Rationale

- a. St. Joseph School is the only Catholic school in Warren County.
- b. The school suffered from extremely low enrollments, including only 48 K-3 students in 2009-10.
- c. A new principal was hired in 2008 and has improved the school's reputation and enrollment.
- d. Two additional grades have been added and enrollment grew to 114 students in K-5 in 2014-15. The kindergarten now enrolls more students than the PreK. Grade one expanded to two sections in 2014-15.
- e. The principal initiated budget controls which resulted in PreK budget surpluses, teacher pay increases to above the diocesan salary scale and a reduction of parish subsidy from 54% of parish ordinary income in 2009-10 to 22% in 2013-14.
- f. These enrollment increases occurred even though Warren County public school K-5 enrollments declined by 4% between 2008-09 and 2013-14.

Eastern Vicariate

OBSERVATIONS

1. There are five elementary schools and two PreK-12 school systems in the Eastern Vicariate. Among the stand-alone elementary schools, three are PreK-8, one is PreK-5 and the other is PreK-6.
2. The DuBois Area Catholic School System has its three schools (PreK-5, 6-8 and 9-12) located on one site while the Elk County Catholic School System operates on two sites with PreK-5 at one site and grades 6-8 and 9-12 at the other.
3. Among the five stand-alone elementary schools, all have enrollments below 200, with two schools (PreK-6 and PreK-5) each below 100 students.
4. The population for age groups 5-14 and 15-19 is projected to decline in every county in the Eastern Vicariate.
5. Infant Baptisms declined 43% in the vicariate and the number of people receiving First Eucharist declined 42% between 2004 and 2014.
6. None of the five elementary schools and neither of the two school systems are operating at 85% or above of its staffing capacity in 2015-16. In fact, three of the five elementary schools are operating at or below 50% capacity, while St. Leo School is operating at 52%.
7. The average class size for grades K-8 in the vicariate in 2015-16 is 13 students.

Clearfield County

Figure 2

Parish Statistics

Parish	Town	Religious Education	Infant Baptisms			First Eucharists ¹		
		Elem. Enr. 2013-14	2003-04	2013-14	% Change	2003-04	2013-14	% Change
Saint Francis	Clearfield	37	21	14		38	4	
Saint Basil the Great	Coalport	56	4	4		7	4	
Saint Timothy	Curwensville	33	7	3		10	10	
Saint Severin Mission	Drifting	0	3	2		1	2	
Saint Catherine	DuBois	65	30	19		39	21	
Saint Joseph	DuBois	13	6	6		10	1	
Saint Michael	DuBois	73	27	13		34	26	
Saint Mary of the Assumption	Frenchville	0	2	2		0	0	
Saint Bonaventure	Grampian	27	1	4		10	8	
Saint Peter & Paul Mission	Grassflat	0	1	3		2	0	
SS. Peter & Paul Mission	Hawk Run	2	1	0		0	1	
Christ the King	Houtzdale	85	11	6		15	16	
Saint Agnes	Morrisdale	20	5	3		5	1	
Immaculate Conception	Osceola Milla	6	3	0		7	3	
Holy Trinity	Ramey	1	0	5		0	0	
Total Clearfield County		418	122	84	-31%	178	97	-46%

¹ Includes children, adults, RCIA

Source: Diocese of Erie

Figure 3

Public School District Enrollment Trends

County School District	K-5 Enrollment			6-8 Enrollment			9-12 Enrollment		
	2008-09	2013-14	5-Yr Change	2008-09	2013-14	5-Yr Change	2008-09	2013-14	5-Yr Change
Clearfield County									
Clearfield Area	1,029	1,010	-2%	603	493	-18%	971	793	-18%
Curwensville Area	502	493	-2%	301	236	-22%	385	376	-2%
DuBois Area	1,874	1,774	-5%	977	945	-3%	1,234	1,119	-9%
Glendale	372	364	-2%	206	193	-6%	276	258	-7%
Harmony Area	162	155	-4%	80	67	-16%	131	104	-21%
Moshannon Valley	427	413	-3%	216	215	0%	330	286	-13%
Philipsburg-Osceola Area	875	829	-5%	449	411	-8%	663	553	-17%
West Branch Area	515	486	-6%	300	266	-11%	423	362	-14%
Total	5,756	5,524	-4%	3,132	2,826	-10%	4,413	3,851	-13%

Source: Pennsylvania Department of Education

Figure 4

Catholic School Enrollment Trends

VICARIATE/County		Grades								Change 09-10 to 15-16	
Town	System/School		09-10	10-11	11-12	12-13	13-14	14-15	15-16	Number	Percent
Clearfield County											
Clearfield	St. Francis	PreK-8	189	192	190	198	193	181	178	-11	-6%
DuBois											
	DuBois Area Catholic School										
	DuBois Central Catholic Elementary	PreK-5	241	243	259	249	273	250	257	16	7%
	DuBois Central Catholic Middle	6-8	94	79	80	84	89	100	97	3	3%
	DuBois Central Catholic High	9-12	178	170	161	152	133	123	138	-40	-22%
	Subtotal DuBois Area Catholic School		513	492	500	485	495	473	492	-21	-4%

Source: Diocese of Erie

OBSERVATIONS

1. Declines in infant baptisms and First Eucharist indicate fewer Catholic children in this area of the Diocese.
2. Public school enrollment trends show that smaller populations are apparent across grade levels.
3. The middle and high school attendance area for DuBois Area Catholic School includes most of Jefferson County and much of Clearfield County. Within a 10-mile radius of DuBois Central Catholic, the population in the community 5 to 14 years of age is 4,224. It is projected to decline 7.5% between 2015 and 2020. DuBois Catholic elementary and middle school has a market share of about 8% of the school-age population, so there is room to grow enrollment by taking a larger share. Again within a 10-mile radius of DuBois Central Catholic, the population 15 to 17 is 1,361. This population age group is more stable for the next five years.
4. Since 2009-10, DuBois Area Catholic Schools held enrollment in grades PreK-5 and 6-8, but lost 22% of enrollment in 9-12. Enrollment among non-Catholic students is holding steady, while enrollment from Catholic students is declining every year. The school is maintaining double classes for every grade, with an average class size of 16 in grades K-5 in 2015-16.
5. DuBois Area Catholic Schools is giving more tuition assistance than any other school, over \$1 million in 2014-15. Yet enrollment lags with losses in grades K-5 and 9-12. Average tuition assistance amounts to \$2,227 per student. High school tuition is \$4,483.
6. While the vast majority of students attending St. Francis School are parishioners, 29 students (16%) belong to 12 other parishes, some of which are distant from the school.
7. In 2013-14, 15% of the children who received First Eucharist in the 13 parishes that send students to St. Francis School were enrolled in 2nd grade at St. Francis School. There could be more potential for enrollment from these parishes.

RECOMMENDATIONS

1. DuBois Area Catholic School needs a strategic long-range vision.

Strategies

- 1.1 Expand the school's strategic plan with further detail and action steps. Incorporate a funding plan and tuition plan that will align with the new direction for funding Catholic education in the Diocese and update management procedures to ensure closer alignment with diocesan policies.
- 1.2 Differentiate the high school and middle school from the public school programs. The school needs to build on their image of strong academics.
- 1.3 Increase enrollment from families currently choosing public education. Segment the target market and develop strategies for specific groups. Address attitudes in the community that may block people from giving DuBois Area Catholic School serious consideration.
- 1.4 Consider extending STAR scholarships to DuBois Catholic feeder schools.

2. St. Francis in Clearfield will continue as a parish school with a vision to serve the wider region.

Strategies

- 2.1 Form a school advisory council with members from various supporting parishes and charge it with supporting enrollment and marketing, strengthening partnerships within the community, building stronger parent support and advocacy, and building the endowment.
- 2.2 Become intentional and organized around marketing, recruitment and retention. Establish a budget and a working committee of the new advisory council.
- 2.3 Expand advancement initiatives; developing gifts and campaigns to fund the school. Build a plan that will coordinate the approach to funding through capital projects, annual funds, and endowment.
- 2.4 Strengthen parish relationships with the 13 parishes sending students to the school.
- 2.5 Participate in the parish-based school Diocesan collaborative (see Academic Excellence, Goal 2).
- 2.6 Work with DuBois Area Catholic School to retain families through 12th grade with emphasis on retaining families who could have children at both schools. Opportunities could include:
 - Transportation
 - Financial assistance
 - Academic articulation

Elk County

Figure 5

Parish Statistics

Parish	Town	Religious Education Elem. Enr. 2013-14	Infant Baptisms			First Eucharists ¹			Number of Children in Parish 2013-14	
			2003-04	2013-14	% Change	2003-04	2013-14	% Change	Age 5-14	Age 15-17
Holy Cross	Brandy Camp	0	0	0		0	0		0	0
St. Joseph	Force	44	9	1		11	10		<i>Data not reported</i>	
Holy Rosary	Johnsonburg	103	26	18		26	23		131	40
St. Boniface	Kersey	67	64	5		35	10		170	45
St. Leo Magnus	Ridgway	215	33	21		50	23		159	162
Queen of the World	St. Marys	} 309	19	15		52	32		<i>Data not reported</i>	
Sacred Heart	St. Marys		35	47		39	27		296	107
St. Mary	St. Marys		31	14		40	21		268	113
St. Anne	Wilcox	0	1	2		7	0		22	8
Total Elk County		738	218	123	-44%	260	146	-44%	1,046	475

¹ Includes children, adults, RCIA

Source: Diocese of Erie

Figure 6

Public School District Enrollment Trends

County School District	K-5 Enrollment			6-8 Enrollment			9-12 Enrollment		
	2008-09	2013-14	5-Yr Change	2008-09	2013-14	5-Yr Change	2008-09	2013-14	5-Yr Change
Elk County									
Johnsonburg Area	282	286	1%	173	144	-17%	254	181	-29%
Ridgway Area	444	353	-20%	238	224	-6%	315	285	-10%
Saint Marys Area	1,015	945	-7%	512	529	3%	829	682	-18%
Total	1,741	1,584	-9%	923	897	-3%	1,398	1,148	-18%

Source: Pennsylvania Department of Education

Figure 7

Catholic School Enrollment Trends

VICARIATE/County		Grades	Enrollment							Change 09-10 to 15-16	
Town	System/School		09-10	10-11	11-12	12-13	13-14	14-15	15-16	Number	Percent
Elk County											
Kersey	St. Boniface	PreK-5	108	104	99	98	87	75	67	-41	-38%
Ridgway	St. Leo	PreK-8	132	134	132	117	117	127	139	7	5%
St. Marys	Elk County Catholic School System										
	St. Marys Catholic Elementary	PreK-5	410	367	337	286	262	275	288	-122	-30%
	St. Marys Catholic Middle	6-8	175	150	142	143	147	134	136	-39	-22%
	Elk County Catholic High	9-12	289	293	275	249	239	234	207	-82	-28%
	<u>Subtotal Elk County Catholic School System</u>		<u>874</u>	<u>810</u>	<u>754</u>	<u>678</u>	<u>648</u>	<u>643</u>	<u>631</u>	<u>-243</u>	<u>-28%</u>

Source: Diocese of Erie

OBSERVATIONS

1. Parish Baptisms and First Eucharist in Elk County each declined by 44% since 2003-04.
2. Approximately 50% of 5th graders in St. Boniface move into 6th grade at Elk County Catholic Schools.
3. Furthering cooperation among Elk County Catholic Schools, St. Boniface School and St. Leo School could bring more opportunities for students to enrich their education and strengthen the retention.

RECOMMENDATIONS

3. Elk County Catholic School System needs a strategic, long-range vision.

Strategies

- 3.1 Develop and implement a comprehensive strategic plan. Identify goals and strategies on finance, marketing, curriculum and teacher compensation. If a new curriculum focus is introduced, test the concept with parents to verify the level of acceptance and if it is perceived to deliver added value.
- 3.2 Expand the corporation to include additional campuses at St. Boniface in Kersey and St. Leo in Ridgway. Incorporation should occur prior to the start of the 2016-2017 school year.
- 3.3 Initiate activities for students and families from St. Boniface School and St. Leo School to experience a strong sense of welcome and familiarity with the Elk County Catholic School System.

4. Maintain St. Boniface Catholic School, Kersey as a PreK-5 school and join Elk County Catholic School System.

Strategies

- 4.1 Reorganize St. Boniface School into a satellite campus of the Elk County Catholic School System for the beginning of the 2016-17 school year.
- 4.2 Maintain the grade configuration of Prek-5 at the St. Boniface Campus. As a new member of the Elk County Catholic School System, site-based decisions will become responsibility of the System.
- 4.3 The Catholic identity and pastoral leadership for the spiritual program of the school will continue to be strongly supported by the pastors of nearby parishes.

5. Maintain St. Leo Catholic School, Ridgway as a PreK-8 school and join Elk County Catholic School System.

Strategies

- 5.1 Reorganize St. Leo School into a satellite campus of the Elk County Catholic School System for the beginning of the 2016-17 school year.
- 5.2 Maintain the grade configuration of Prek-8 at St. Leo. As a new member of the Elk County Catholic School System, site-based decisions will become responsibility of the System.
- 5.3 The Catholic identity and pastoral leadership for the spiritual program of the school will continue to be strongly supported by the pastors of nearby parishes.

Jefferson County

Figure 8

Parish Statistics

Parish	Town	Religious Education	Infant Baptisms			First Eucharists ¹		
		Elem. Enr. 2013-14	2003-04	2013-14	% Change	2003-04	2013-14	% Change
Saint Joseph Mission	Anita	0	3	0		0	0	
Saint Tobias	Brockway	87	19	5		24	14	
Immaculate Conception	Brookville	40	12	9		20	12	
Saint Adrian Mission	DeLancey	0	2	0		0	0	
Saint Bernard	Falls Creek	0	5	5		6	2	
SS Cosmas & Damian	Punxsutawney	83	18	12		40	17	
Saint Mary	Reynoldsville	21	5	4		7	10	
Saint Dominic Mission	Sigel	0	1	0		1	0	
Assumption of the B.V.M.	Sykesville	0	3	5		7	4	
Saint Anthony of Padua Mission	Walston	0	2	0		0	0	
Total Jefferson County		231	70	40	-43%	105	59	-44%

¹ Includes children, adults, RCIA

Source: Diocese of Erie

Figure 9

Public School District Enrollment Trends

County School District	K-5 Enrollment			6-8 Enrollment			9-12 Enrollment		
	2008-09	2013-14	5-Yr Change	2008-09	2013-14	5-Yr Change	2008-09	2013-14	5-Yr Change
Jefferson County									
Brockway Area	479	491	3%	264	231	-13%	333	296	-11%
Brookville Area	739	732	-1%	398	387	-3%	519	458	-12%
Punxsutawney Area	972	988	2%	628	555	-12%	865	659	-24%
Total	2,190	2,211	1%	1,290	1,173	-9%	1,717	1,413	-18%

Source: Pennsylvania Department of Education

Figure 10

Ss. Cosmas and Damian Catholic School Enrollment Trends

By Grade								Capacity	% of Cap.
	09-10	10-11	11-12	12-13	13-14	14-15	15-16	by Grade	15-16
PreK-3						6	8	16	50%
PreK-4						17	15	17	88%
PreK	30	28	25	31	28				
K	12	12	14	15	11	10	9	25	36%
1	19	12	13	14	13	10	9	25	36%
2	19	20	13	12	13	9	7	25	28%
3	16	19	20	13	10	13	10	25	40%
4	10	8	8	14	3	7	11	25	44%
5	3	8	3	7	13	2	5	25	20%
6	2	3	5	3	6	6	2	25	8%
7	5	2	2	5	3		6	25	24%
8	3	3	1						
Total K-8	89	87	79	83	72	57	59	200	30%
Total PreK-8	119	115	104	114	100	80	82	233	35%

OBSERVATIONS

1. Maintaining low tuition has not boosted enrollment. Saints Cosmas and Damian Catholic School provided \$115,351 in tuition assistance for 2014-15, an average of \$2,023 per student K-5; and the tuition is \$2,702 for first student.
2. Within a 10-mile radius of Punxsutawney, the population age 5 to 14 is 2,713, and slowly diminishing. To be a full school would require almost a 9% market share, a long reach for a small school; in other words full classes of every grade seems unrealistic.
3. Retention has been a challenge, especially from 3rd to 4th grade which has lost a net average of 8 students, probably as a result of the Punxsutawney public school district grade configurations of PreK-3, 4-7 and 8-12. The public school district will be adjusting the grade configurations of their schools for the 2016-2017 school year. The new model will house the students in PreK-2, 3-6, and 7-12 grade configurations.

RECOMMENDATIONS**6. Saints Cosmas and Damian Catholic School will move to a PreK-6 grade structure in 2016-17.***Strategies*

- 6.1 Review the school's grade structure and move to a grade configuration in line with the Punxsutawney public school district.
- 6.2 Incentivize students and their families to consider continuing their Catholic education at DuBois Area Catholic School by:
 - Developing a curriculum that flows into DuBois Central Catholic Middle School
 - Coordinating with DuBois Area Catholic School to maximize the effect of STAR scholarship money
- 6.3 Study the feasibility of adding an after-school program.

- 6.4 Participate in the parish-based school Diocesan collaborative (see Academic Excellence, Goal 2).
- 6.5 To be viable long term, the school and parish will need to make an investment over a few years to market and recruit more public school families, both Catholic and non-Catholic. Focus marketing efforts less on advertising and more on building relationships that establish direct connections with a wide network of young parents.
- 6.6 Develop and fund a professional development program that will include team building initiatives.
- 6.7 Develop a stronger identity as a Catholic school for the whole community. Welcome people of other faith traditions and strengthen the Christian environment to distinguish the school even more from the public schools.
- 6.8 Establish specific viability criteria for the school based on the *Key Indicators of a Healthy School for the Diocese of Erie*, particularly overall and class-specific enrollment minimums and financial criteria relating to balanced budgets and subsidy amounts.

McKean County

Figure 11

Parish Statistics

Parish	Town	Religious Education	Infant Baptisms			First Eucharists ¹		
		Elem. Enr. 2013-14	2003-04	2013-14	% Change	2003-04	2013-14	% Change
Saint Bernard	Bradford	63	43	17		36	30	
Saint Francis of Assisi	Bradford	0	6	5		0	0	
Saint Raphael	Eldred	18	6	1		7	4	
Saint Callistus	Kane	71	24	7		24	7	
Our Mother of Perpetual Help	Lewis Run	0	4	0		0	2	
Saint Joseph	Mount Jewett	7	0	1		2	3	
Saint Gabriel	Port Allegany	25	5	2		8	9	
Saint Elizabeth	Smethport	40	4	4		5	7	
Total McKean County		224	92	37	-60%	82	62	-24%

¹ Includes children, adults, RCIA

Source: Diocese of Erie

Figure 12

Public School District Enrollment Trends

County School District	K-5 Enrollment			6-8 Enrollment			9-12 Enrollment		
	2008-09	2013-14	5-Yr Change	2008-09	2013-14	5-Yr Change	2008-09	2013-14	5-Yr Change
McKean County									
Bradford Area	1,217	1,110	-9%	576	594	3%	1,032	789	-24%
Kane Area	538	551	2%	302	263	-13%	389	388	0%
Otto-Eldred	311	323	4%	160	163	2%	247	222	-10%
Port Allegany	411	401	-2%	235	213	-9%	361	268	-26%
Smethport Area	424	368	-13%	225	187	-17%	317	288	-9%
Total	2,901	2,753	-5%	1,498	1,420	-5%	2,346	1,955	-17%

Source: Pennsylvania Department of Education

Figure 13

Catholic School Enrollment Trends

VICARIATE/County		Grades								Change 09-10 to 15-16	
Town	System/School		09-10	10-11	11-12	12-13	13-14	14-15	15-16	Number	Percent
McKean County											
Bradford	St. Bernard Elementary/Middle	PreK-8	185	168	170	150	138	131	109	-76	-41%

Source: Diocese of Erie

OBSERVATIONS

1. The overall population of McKean County is projected to remain stable through both 2020 and 2030. The school-aged population, however, varies somewhat, with the 0-4 year old age group projected to remain stable while the 5-14 year old age group is expected to decline 9% by 2020 and another 7% by 2030.
2. Children from 5 parishes attend St. Bernard School: St. Bernard, St. Francis of Assisi, St. Raphael, Our Mother of Perpetual Help and St. Elizabeth. Infant baptisms in these five parishes have declined by 57% (36 Baptisms) between 2003-04 and 2013-14. First Eucharists have declined by only 10% (5), but this number includes adults as well as children.
3. The public school enrollment in the Bradford area includes 1,110 children in grades K-5 in 2013-14 and 594 children in grades 6-8. The K-5 enrollment has declined 9% since 2008-09 while the grade 6-8 enrollment has increased by 3%.
4. Marketing for enrollment is primarily through the web site and word-of-mouth. There is no person assigned to recruiting activities.

RECOMMENDATIONS

7. Maintain St. Bernard School as a parish PreK-8 school.

Strategies

- 7.1 Create an enrollment management position to increase marketing activities and expand recruiting into neighboring parishes and the world of public school families.
- 7.2 Participate in the parish-based school Diocesan collaborative (see Academic Excellence, Goal 2).
- 7.3 Utilize the school's technology inventory to expand 21st century learning experiences (e.g. project-based learning).

Rationale

- a. St. Bernard School is the only Catholic school in McKean County.
- b. The operating budget is currently balanced, but the school is heavily subsidized by the parish, receiving 48% of its revenue from subsidy in 2013-14.
- c. In 2015-16, there are six grades with fewer than 10 students each. There are two other classes with between 10 and 12 students each. If additional budget economies were required, multi-age classes could be created.
- d. The pastor and many parishioners believe the school is an important ministry.

Western Vicariate

OBSERVATIONS

1. There are six elementary schools, one high school and one PreK-12 school system in the Western Vicariate. Four of the elementary schools are PreK-8 and two are PreK-6. Seton Catholic, in Meadville, is a multi-parish school.
2. The Kennedy Catholic Family of Schools consolidated three elementary schools into an elementary and a middle school in 2011. Kennedy Catholic High School serves the students in grades 9-12.
3. The vicariate has experienced a 29% decline in students since 2009-10.
4. The school-age population in the vicariate is projected to remain relatively stable (+/- 5%) between 2010 and 2030.
5. Infant Baptisms in the vicariate declined 37% and the number of people receiving First Eucharist declined 43% between 2004 and 2014.
6. All of the schools in the vicariate are operating well below the optimal capacity in 2015-16. The two high schools currently enroll between 57% and 60% of capacity. All of the stand-alone elementary schools are operating at 66% of capacity or below, with one school (PreK-6) enrolling only 46% of capacity. St. John Paul II elementary school, part of the Kennedy Catholic Family of Schools, is operating at 84% of capacity in 2015-16.
7. The average class size for the elementary grades in the vicariate in 2015-16 is 12.

Venango County

Figure 14

Parish Statistics

Parish	Town	Religious Education	Infant Baptisms			First Eucharists ¹		
		Elem. Enr. 2013-14	2003-04	2013-14	% Change	2003-04	2013-14	% Change
Assumption B.V.M.	Oil City	0	1	0		0	0	
Our Lady Help of Christians	Oil City	0	4	2		3	1	
Saint Joseph	Oil City	20	18	12		9	3	
Saint Michael	Emlenton	33	1	10		3	5	
Saint Patrick	Franklin	55	19	10		31	12	
Saint Stephen	Oil City	26	14	17		26	18	
Saint Venantius	Rouseville	0	0	2		1	1	
Total Venango County		134	57	53	-7%	73	40	-45%

¹ Includes children, adults, RCIA

Source: Diocese of Erie

Figure 15

Public School District Enrollment Trends

County School District	K-5 Enrollment			6-8 Enrollment			9-12 Enrollment		
	2008-09	2013-14	5-Yr Change	2008-09	2013-14	5-Yr Change	2008-09	2013-14	5-Yr Change
Venago County									
Cranberry Area	518	517	0%	301	275	-9%	439	356	-19%
Franklin Area	912	898	-2%	472	466	-1%	748	616	-18%
Oil City Area	1,002	964	-4%	484	489	1%	785	669	-15%
Titusville Area	1,058	1,030	-3%	451	477	6%	660	563	-15%
Valley Grove	464	413	-11%	216	237	10%	304	269	-12%
Total	3,954	3,822	-3%	1,924	1,944	1%	2,936	2,473	-16%

Source: Pennsylvania Department of Education

Figure 16

Catholic School Enrollment Trends

VICARIATE/County Town	System/School	Grades									Change 09-10 to 15-16		
			09-10	10-11	11-12	12-13	13-14	14-15	15-16	Number	Percent		
Venango County													
Franklin	St. Patrick	PreK-8	104	74	81	87	86	92	77		-27	-26%	
Oil City	St. Stephen	PreK-8	166	149	152	139	148	137	132		-34	-20%	
Oil City	Venango Catholic High	9-12	83	85	96	81	76	72	67		-16	-19%	

Source: Diocese of Erie

OBSERVATIONS

1. The decline in the number of people receiving First Eucharist (which includes adults), especially in the parishes of St. Patrick and St. Stephen, between 2003-04 and 2013-14 is significant.
2. Public middle school enrollments showed a slight gain between 2008-09 and 2013-14. Public school primary grades experienced a slight decline while high school enrollments sharply declined in the same time period. Even with the declines, however, there are still thousands of school-aged children in the county.
3. Venango Catholic High School has experienced declining enrollment since 2011-12 and is currently operating with 67 students.
4. Venango Catholic High School's freshmen come almost exclusively from two Catholic elementary schools. In 2014-15, not a single freshman had graduated from a public elementary school.
5. St. Patrick School in Franklin has experienced an enrollment decline since 2009-10 and is currently operating with 77 PreK-8 students. There are three multi-grade classrooms in 2015-16.
6. St. Stephen School in Oil City has experienced reduced enrollment, but still has 132 PreK-8 students in 2015-16.

RECOMMENDATIONS

1. Venango Catholic High School will close at the end of the 2015-2016 school year.

Rationale

- a. The high school has virtually no debt at this point. If option 1 is not viable, and if a status quo situation results, it is a certainty that the school will begin acquiring debt and will then close, years later, placing a financial burden on the Diocese.
- b. Without an influx of money, new programs and updated facilities, the education at Venango Catholic High School will very likely deteriorate, creating an unjust situation for those few students and families who remain out of a sense of loyalty.

2. Maintain St. Stephen School in Oil City and St. Patrick School in Franklin as PreK-8, parish-based schools.

Strategies

- 2.1 Establish specific viability criteria for each school based on the *Key Indicators of a Healthy School for the Diocese of Erie*, particularly overall and class-specific enrollment minimums and financial criteria relating to balanced budgets and subsidy amounts.
- 2.2 Both schools will participate in the parish-based school Diocesan collaborative (see Academic Excellence, Goal 2).
- 2.3 If Venango Catholic High School remains independent and returns to solid viability, consider creating a school system in Oil City with St. Stephen School for both financial efficiency and academic articulation. Invite St. Patrick School into the system.

Mercer County

Figure 17

Parish Statistics

Parish	Town	Religious Education	Infant Baptisms			First Eucharists ¹		
		Elem. Enr. 2013-14	2003-04	2013-14	% Change	2003-04	2013-14	% Change
Our Lady of Fatima-St. Ann	Farrell	0	0	11		0	10	
St. Adalbert	Farrell	11	15	2		9	0	
St. Michael	Greenville	0	34	19		56	34	
Beloved Disciple	Grove City	120	16	12		28	26	
Notre Dame	Hermitage	126	51	30		71	30	
Immaculate Heart of Mary	Mercer	59	7	2		16	12	
Sacred Heart	Sharon	0	6	1		4	2	
St. Anthony	Sharon	6	12	1		3	1	
St. Joseph	Sharon	121	34	16		59	32	
St. Stanislaus Kostka-Holy Trinity	Sharon	10	0	1		0	0	
St. Bartholomew	Sharpsville	72	7	20		15	20	
St. Columbkille	Stoneboro	3	0	0		10	1	
Good Shepherd	West Middlesex	63	6	7		18	17	
Total Mercer County		591	188	122	-35%	289	185	-36%

¹ Includes children, adults, RCIA

Source: Diocese of Erie

Figure 18

Public School District Enrollment Trends

County School District	K-5 Enrollment			6-8 Enrollment			9-12 Enrollment		
	2008-09	2013-14	5-Yr Change	2008-09	2013-14	5-Yr Change	2008-09	2013-14	5-Yr Change
Mercer County									
Commodore Perry	252	216	-14%	138	125	-9%	216	166	-23%
Farrell Area	441	382	-13%	198	156	-21%	245	247	1%
Greenville Area	625	595	-5%	342	344	1%	560	456	-19%
Grove City Area	984	902	-8%	631	537	-15%	1,210	1,070	-12%
Hermitage	884	932	5%	505	466	-8%	725	648	-11%
Jamestown Area	267	219	-18%	132	139	5%	203	183	-10%
Lakeview	562	497	-12%	297	316	6%	405	385	-5%
Mercer Area	547	533	-3%	351	294	-16%	470	414	-12%
Reynolds	523	485	-7%	282	276	-2%	416	371	-11%
Sharon City	987	1,099	11%	489	489	0%	642	518	-19%
Sharpsville Area	600	573	-5%	303	313	3%	405	423	4%
West Middlesex Area	506	417	-18%	294	244	-17%	352	349	-1%
Total	7,178	6,850	-5%	3,962	3,699	-7%	5,849	5,230	-11%

Source: Pennsylvania Department of Education

Figure 19
Catholic School Enrollment Trends

VICARIATE/County		Grades									Change 09-10 to 15-16	
Town	System/School		09-10	10-11	11-12	12-13	13-14	14-15	15-16	Number	Percent	
Mercer County												
Farrell	Msgr. Geno J. Monti <i>(closed)</i>		52	40	24						-52	
Greenville	St. Michael	PreK-8	171	155	152	139	149	146	130	-41	-24%	
Hermitage	Shenango Valley Catholic School System											
	Notre Dame <i>(closed)</i>		212	196								
Sharon	St. Joseph <i>(closed)</i>		181	150								
	Saint John Paul II Elem. & PreSch	PreK-5	0	0	194	225	218	198	167			
	Kennedy Catholic Middle	6-8	0	0	111	111	98	81	79			
	Kennedy Catholic High	9-12	245	259	254	278	218	194	170			
<u>Subtotal Shenango Valley Catholic School System</u>			<u>638</u>	<u>605</u>	<u>559</u>	<u>614</u>	<u>534</u>	<u>473</u>	<u>416</u>	<u>-222</u>	<u>-35%</u>	

Source: Diocese of Erie

OBSERVATIONS

1. The Kennedy Catholic Family of Schools was created in 2011-12 and is experiencing adjustments in some administrative areas and enrollment declines.
2. Thirteen parishes in Mercer County provide subsidy to the system. Twelve of the parishes have one or more parish children enrolled in the system.
3. Marketing and enrollment management was described as weak in the recent past. Within the past year, personnel have been added to address these concerns.
4. The Kennedy Catholic High School alumni database is incomplete and outdated. There is no Annual Fund and advancement activities are limited to fundraising events.
5. Enrollment at St. Michael School has declined to fewer than 150 students, which is 65% of capacity in 2015-16.
6. The student body at St. Michael School has significantly increased its non-Catholic population, declining from 92% Catholic in 2009-10 to 51% Catholic in 2015-16.

RECOMMENDATIONS

3. Update and expand the Kennedy Catholic Family of Schools' enrollment management plan.

Strategies

- 3.1 Conduct market research to accurately determine the public perception of the schools.
- 3.2 Create a comprehensive enrollment management plan, including marketing, recruiting, admission and retention. Create distinct sub-plans for pre-school, kindergarten, 6th grade and 9th grade.
- 3.3 Integrate the tuition assistance program with recruiting activities.

4. Update and expand the Kennedy Catholic Family of Schools' advancement plan.

Strategies

- 4.1 Create a five-year plan to update the advancement program with a goal to reduce parish subsidies and prepare the system for a future capital campaign:
 - Research and update advancement software that will provide effective record keeping and reporting of all efforts of the Advancement Office.
 - Update the alumni database and organize an Alumni Association.
 - Designate the Annual Fund appeal as the primary focus of the Advancement Office's yearly efforts.
 - Establish an Advancement Committee comprised of potential major donors/supporters (people of influence and affluence) to assist the Advancement Office in major funding initiatives.
 - Organize a Parent Club and emphasize its role in organizing and running special events for fundraising purposes.
- 4.2 Delay participation in endowment creation, planned giving and foundation activities until the Annual Fund has been firmly established.

5. Maintain St. Michael School in Greenville as a parish-based, PreK-8 school.

Strategies

- 5.1 Create an enrollment management position to increase marketing activities and expand recruiting into neighboring parishes and the world of public school families.
- 5.2 Establish specific viability criteria for the school based on the *Key Indicators of a Healthy School for the Diocese of Erie*, particularly overall and class-specific enrollment minimums and financial criteria relating to balanced budgets and subsidy amounts.
- 5.3 Study the potential and need for a PreK-3 year old program.
- 5.4 Participate in the parish-based Diocesan school collaborative (see Academic Excellence, Goal 2).
- 5.5 Work with the Kennedy Catholic Family of Schools to retain families through 12th grade with emphasis on retaining families who could have children at both schools. Opportunities could include:
 - Transportation
 - Financial assistance
 - Academic articulation
 - Combined marketing

Clarion County

Figure 20

Parish Statistics

Parish	Town	Religious Education	Infant Baptisms			First Eucharists ¹		
		Elem. Enr. 2013-14	2003-04	2013-14	% Change	2003-04	2013-14	% Change
Immaculate Conception	Clarion	87	29	15		39	16	
Saint Nicholas Mission	Crates	20	3	0		1	0	
Saint Mary	Crown	26	4	1		6	7	
Saint Eusebius	East Brady	10	2	0		3	3	
Saint Michael	Fryburg	61	15	15		16	11	
Saint Joseph	Lucinda	16	14	9		15	10	
Saint Charles	New Bethlehem	0	5	2		6	0	
Saint Richard Mission	Rimersburg		0			1		
Total Clarion County		220	72	42	-42%	87	47	-46%

¹ Includes children, adults, RCIA

Source: Diocese of Erie

Figure 21

Public School District Enrollment Trends

County School District	K-5 Enrollment			6-8 Enrollment			9-12 Enrollment		
	2008-09	2013-14	5-Yr Change	2008-09	2013-14	5-Yr Change	2008-09	2013-14	5-Yr Change
Clarion County									
Allegheny-Clarion Valley	336	292	-13%	218	169	-22%	313	242	-23%
Clarion Area	367	337	-8%	201	182	-9%	299	295	-1%
Clarion-Limestone Area	417	392	-6%	266	189	-29%	352	307	-13%
Keystone	504	487	-3%	262	240	-8%	397	335	-16%
North Clarion County	231	225	-3%	152	123	-19%	236	209	-11%
Redbank Valley	516	541	5%	311	219	-30%	408	367	-10%
Union Area	253	299	18%	174	124	-29%	241	194	-20%
Total	2,624	2,573	-2%	1,584	1,246	-21%	2,246	1,949	-13%

Source: Pennsylvania Department of Education

Figure 22

Catholic School Enrollment Trends

VICARIATE/County Town	System/School	Grades	Enrollment								Change 09-10 to 15-16	
			09-10	10-11	11-12	12-13	13-14	14-15	15-16	Number	Percent	
Clarion County												
Clarion	Immaculate Conception	PreK-6	120	102	97	92	77	74	79	-41	-34%	
Lucinda	St. Joseph	PreK-6	103	109	105	122	119	115	83	-20	-19%	

Source: Diocese of Erie

OBSERVATIONS

1. The number of infant baptisms and all First Eucharists has declined significantly in the past ten years, more than a 40% decline since 2003-04.
2. While public school enrollments have declined since 2008-09, the most significant declines occurred in grades 6 to 8. Enrollments in grades K to 5 have been more stable.
3. Both Catholic schools in Clarion County have lost enrollment since 2009-10 with St. Joseph School declining 19% and Immaculate Conception School declining by 34%.
4. In 2015-16, St. Joseph School is operating at 54% of K-8 capacity while Immaculate Conception School is operating at 50% of K-8 capacity.

RECOMMENDATIONS

6. Maintain Immaculate Conception School in Clarion and St. Joseph School in Lucinda as PreK-6, parish-based schools and initiate collaboration in marketing and curriculum.

Strategies

- 6.1 Create an advisory council to assist with the marketing of the two schools regionally. Focus on the advantages of a Catholic education and distinguish it from public schools. Include representation from various parishes in the county.
- 6.2 Create a curriculum review committee, including both school principals, to develop programs and approaches to enhance the academic rigor of both schools.
- 6.3 Both schools will participate in the parish-based school Diocesan collaborative (see Academic Excellence, Goal 2).
- 6.4 If enrollment at both schools increases, consider expanding Immaculate Conception School's program to include a Catholic middle school for the county.
- 6.5 If a middle school at Immaculate Conception School is not viable, encourage graduates of both schools to continue their Catholic education in Oil City.

Rationale

- a. The two schools are only ten miles apart and have overlapping attendance areas, especially in Shippenville. Working together cooperatively could increase enrollments in both schools.
- b. Despite significant tuition assistance, enrollment has not increased in the past 6 years.
- c. Maintaining both locations will best serve Catholics in Clarion County.

Crawford County

Figure 23

Parish Statistics

Parish	Town	Religious Education	Infant Baptisms			First Eucharists ¹		
		Elem. Enr. 2013-14	2003-04	2013-14	% Change	2003-04	2013-14	% Change
Saint Anthony	Cambridge Springs	15	5	4		8	5	
Our Lady of Lourdes Mission	Cochranon	29	5	2		6	5	
Our Lady Queen of Americas	Conneaut Lake	61	10	0		16	13	
Saint Peter	Conneautville	12	3	1		8	1	
Saint Philip	Crossingville	0	0	1		6	0	
Saint Hippolyte	Frenchtown	38	5	4		6	5	
Saint Philip	Linesville	14	1	0		6	3	
Immaculate Conception Mission	Mageetown	0	1	0		7	0	
Saint Agatha	Meadville	32	11	10		20	12	
Saint Brigid	Meadville	50	11	13		18	11	
Saint Mary of Grace	Meadville	38	7	7		17	14	
Saint Bernadette Mission	Saegertown	17	1	0		5	4	
Saint Titus	Titusville	60	12	2		12	6	
Saint Walburga	Titusville	60	3	0		2	0	
Total Crawford County		426	75	44	-41%	137	79	-42%

¹ Includes children, adults, RCIA

Source: Diocese of Erie

Figure 24

Public School District Enrollment Trends

County School District	K-5 Enrollment			6-8 Enrollment			9-12 Enrollment		
	2008-09	2013-14	5-Yr Change	2008-09	2013-14	5-Yr Change	2008-09	2013-14	5-Yr Change
Crawford County									
Conneaut	1,068	930	-13%	578	535	-7%	917	696	-24%
Crawford Central	1,826	1,757	-4%	894	956	7%	1,320	1,107	-16%
Penncrest	1,538	1,293	-16%	911	775	-15%	1,353	1,097	-19%
Total	4,432	3,980	-10%	2,383	2,266	-5%	3,590	2,900	-19%

Source: Pennsylvania Department of Education

Figure 25

Catholic School Enrollment Trends

VICARIATE/County Town	System/School	Grades	Enrollment							Change 09-10 to 15-16		
			09-10	10-11	11-12	12-13	13-14	14-15	15-16	Number	Percent	
Crawford County												
Meadville	Seton Catholic	PreK-8	180	189	186	179	192	189	166	-14	-8%	

Source: Diocese of Erie

OBSERVATIONS

1. Seton Catholic is the only Catholic school in Crawford County. Meadville is located along interstate 79 between Erie and the Pittsburgh metro area.
2. The number of Catholic students in the school has remained very stable over the past 6 years. Declines in number of baptisms and First Eucharist will impact the pool of students available for the future.
3. Seton Catholic attracts between 16% and 25% of the Catholic children in surrounding parishes. There are 14 parishes and missions in Crawford County.
4. The Meadville parishes provide a significant amount of subsidy to Seton Catholic. There is no formal agreement, however, among the parishes regarding a formula for their financial support.
5. Seton Catholic's 2014-15 tuition of \$3,670 is higher than at other elementary schools in the Diocese.
6. Parish revenues have been declining as membership declines.
7. Seton Catholic receives a minimal amount of EITC funding, all through the STAR Foundation.

RECOMMENDATIONS

7. Maintain Seton Catholic School as a PreK-8, multi-parish school.

Strategies

- 7.1 Create a long-range facilities plan and budget utilizing a professional approach to facilities planning.
- 7.2 Develop a subsidy formula among the sponsoring parishes.
- 7.3 Develop strategies and activities to develop stronger parish connections and support for encouraging parish children to attend the school.
- 7.4 Participate in the parish-based Diocesan school collaborative (see Academic Excellence, Goal 2).
- 7.5 The school's Advancement Office will target increased corporate contributions through EITC.

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III. ACADEMIC EXCELLENCE

OBSERVATIONS

1. Currently, academic achievement in elementary schools is measured diocesan-wide solely by administering a variety of standardized assessments. Beginning in 2015-16, the Diocese will introduce the Terra Nova Test.
2. Academic achievement in high schools is currently determined by composite scores on national college acceptance tests (ACT and SAT) and by the listing of college and university acceptances for the school's graduates.
3. Looking at the Stanford complete battery scores for a grade cohort in each school over the past five years and focusing on results from grades 7 and 8 in the past two years, 15 of the 27 elementary schools had scores in the 70th percentile. Three schools had students achieving in the 80th percentile range. Conversely, there were five schools whose students scored in the 60th percentile range and four schools with students scoring only in the 50th percentile.
4. School administrators are not consistently using test data to improve teaching. Issues are access to the data, understanding the data, and translating data into action plans.
5. Increasing demands are being placed on the schools as a result of social and demographic changes, including:
 - More students with learning disabilities and challenges
 - Declining populations in towns outside of Erie
 - Growing expectations for more advanced programs
 - Increasing use of technology
6. Parents want to know that the tuition dollars spent on their child's Catholic education will be worth the investment, not only in terms of Catholic identity, but also in terms of academic excellence.
7. The diocesan salary scale is set at approximately 50% of the public school scales. Quality teachers are the linchpin of quality schools. Some schools have reported that it is a challenge to attract and retain quality teachers, especially in those specialized areas such as math, science and international languages.
8. The diocesan curriculum is standards-based. Math and English language arts are currently aligned with the Common Core Standards as minimal standards. Catholic content is integrated throughout.
9. A comprehensive curriculum which includes visual and performing arts, international language instruction and on-line opportunities are necessary for a well-rounded educational experience. While these experiences are available in some schools, not all students in the Diocese benefit.
10. All schools are not using the diocesan curriculum with fidelity. Therefore, we do not have consistent rigor throughout the schools.
11. Accountability for student performance and academic progress on both elementary and secondary levels needs to include multiple quantitative and qualitative assessments.
12. Professional development is essential not only for improved academic achievement, but to provide job satisfaction for underpaid teachers. Most elementary schools depend on the

Diocese for professional development activities. Lack of money and time are the most frequently mentioned obstacles to a more robust program.

13. Remediation and enrichment for students with a variety of academic needs is provided and publically funded through ACT 89 and Title I. Very few schools provide resources for students outside of these publically-funded programs.
14. Some elementary schools depend on nearby high schools to provide challenges to their academically talented students, especially in math and science. Insufficient numbers of advanced students at many schools inhibit the development of a locally challenging curriculum.
15. There are numerous examples of excellence in individual schools throughout the Diocese such as school-wide curriculum mapping, differentiated instruction, use of prescribed math curricula such as ALEKS, international language opportunities using Rosetta Stone and exemplary programs in the arts and public speaking. There seems, however, to be minimal sharing of best practices. The level of quality among schools is uneven throughout the Diocese.
16. Catholic high schools in Erie County are uniformly excellent. Options exist for both co-educational and single-gender experiences. All three high schools are strictly college preparatory, yet all provide assistance for struggling students. Students in the county have access to numerous AP and STEM courses, an IB program and dual enrollment opportunities at local Catholic universities.
17. Catholic high schools outside of Erie County also provide a quality education, but are being challenged by declining enrollments which, in turn, affect program offerings and financial resources. Small classes place limitations on affordable offerings. Fewer students can limit diversity of discussion. Some parents are beginning to question the rigor, and therefore the value, of the high school experience. All four high schools are attempting to overcome their challenges with on-line courses, and employment of current technology.

GOALS AND STRATEGIES

1. Every Catholic school in the Diocese of Erie will effectively combine Catholic identity and academic excellence, which will distinguish it from other schools in the community.

Strategies

- 1.1 The combination of these two integral aspects of the school's mission will be clearly articulated to the community.
- 1.2 The Catholic Schools Office will identify specific benchmarks to be achieved in these two inter-related areas.
- 1.3 Each school will adhere to the diocesan-selected academic standards for each subject area.
- 1.4 The Catholic Schools Office will ensure that opportunities exist for individual schools to share their unique and successful academic programs with other diocesan schools. Schools with these programs will be encouraged to provide advice and assistance to other diocesan schools that are interested in adopting similar programs.
- 1.5 Each elementary and high school will achieve and maintain accreditation by the Middle States Association of Colleges and Schools.

- 1.6 Each school will hire the best teachers possible, ones who are qualified to teach in the specific teaching position, who are certified and who have impeccable references.
- 1.7 All schools will offer a complete academic program, including instruction in the arts, and will provide co-curricular opportunities which are age appropriate.
- 1.8 In some schools different staffing models will need to be adopted to maintain cost effective staffing levels while also providing academic excellence.

2. The eleven parish-based schools in the Diocese, not connected to a school system, will create a Diocesan collaborative in order to improve academic quality and operational efficiency.

Strategies

- 2.1 The eleven schools included in the consortium will be:
 - Immaculate Conception School, Clarion
 - St. Bernard School, Bradford
 - Ss. Cosmas and Damian School, Punxsutawney
 - St. Francis School, Clearfield
 - St. Gregory School, North East
 - St. Joseph School, Lucinda
 - St. Joseph School, Warren
 - St. Michael School, Greenville
 - St. Patrick School, Franklin
 - St. Stephen School, Oil City
 - Seton Catholic School, Meadville
- 2.2 The Catholic Schools Office will appoint a coordinator to organize collaborations and provide resources and models for creating excellent parish-based schools.
- 2.3 Research programs such as WINGS from the Diocese of Grand Rapids and the West Collaborative for Catholic Schools in the Diocese of St. Paul and Minneapolis for collaboration models.
- 2.4 Some examples of opportunities for consortium members include:
 - Leverage combined purchasing power.
 - Create teamwork among educators and offer shared professional development.
 - Share resources to offer enhanced educational opportunities.
 - Organize cooperative efforts for marketing and advancement.
 - Jointly seek grants, scholarship opportunities, and funding.

3. Catholic school administrators and teachers will engage in ongoing professional development that enhances professional knowledge and skills.

Strategies

- 3.1 Year-long professional development themes related to school improvement and teacher effectiveness will be identified by each school annually and communicated to the Catholic Schools Office. Teachers will plan classroom activities that align with this annual theme.
- 3.2 Each school will provide opportunities for teachers and administrators to participate in local, regional and national conferences and workshops as well as opportunities to visit schools with exemplary programs.
- 3.3 The teacher contract will be amended over time to include ten days of professional development each year. This increase will be instituted with an appropriate increase in compensation.
- 3.4 Partnerships will be pursued by the individual school or by the Diocese with colleges and universities to provide professional development opportunities and an affordable avenue to advanced degrees.

4. Technology will support the instructional goals of each school and provide students with a solid technology foundation for their future.

Strategies

- 4.1 Each school will maintain a Technology Committee composed of administrator(s), faculty and parent/community members with technology expertise.
- 4.2 Each school will complete a technology audit before constructing a technology plan.
- 4.3 Each school will develop a comprehensive technology plan that will provide direction to:
 - The vision and rationale for technology and how it will be used effectively to enhance student learning. Develop a strategy within the plan to widely market this vision to the school and wider community.
 - The integration of technology in all curricular areas. Use the vision as a foundation to develop content area strategies for integrating appropriate technology at each academic grade level.
 - Decisions regarding hardware and software purchases.
 - An appropriate timeline to continually upgrade and replace technology.
 - Providing appropriate technical and educational support to faculty, staff and students in their use of technology.
- 4.4 Expectations will be established for teachers to use instructional approaches that integrate the use of technology into the classroom and provide opportunities for students to engage in technology-enhanced projects that extend beyond research and word processing.
- 4.5 Ongoing training will be provided for faculty in the practical use of technology in their specific content area and commensurate with their increasing levels of expertise.
- 4.6 All schools, but particularly those in areas outside of Erie County, will anticipate the need to provide videoconferencing capabilities for both professional development purposes and to provide access to specialized courses for students.

- 4.7 Additional opportunities will be researched to offer virtual courses for those subjects with limited enrollment potential (e.g., international languages, advanced science and math courses, etc.). Consider byu.is, thevirtualhighschool.org or www.edifiedonline.org as part of the investigation.
- 4.8 Technology will also be utilized to enhance the standard curriculum (e.g., www.khanacademy.org, www.mybigcampus.com). The effective utilization of technology should be included in setting expectations of teachers and in their evaluations.

5. Each school will emphasize the mastery of school-wide academic goals and course-specific objectives.

Strategies

- 5.1 Each school will use multiple methods to assess student achievement on learning objectives, including standardized tests and other measures.
- 5.2 The new standardized testing program will be used to provide measurable academic benchmarks for schools to achieve.
- 5.3 Professional development will increase awareness of current assessment theories and support appropriate assessment practices among teachers and administrative staff.
- 5.4 Student progress toward mastery of learning objectives will be included as one of the factors in the ongoing supervision and evaluation of principals and teachers.
- 5.5 Professional development programs for staff will be tied to student learning objectives and success in achieving the learning outcomes.
- 5.6 The Catholic Schools Office will provide assistance to schools on effective data collection and its management, analysis and application to developing curriculum and improving student performance.
- 5.7 As part of its strategic plan (see Governance and Leadership Goal 7) and accreditation process, each school will develop annual school goals which will emphasize best practices.
- 5.8 Principals and teachers will review and interpret all test scores for trends and needs. This information will be utilized each year in developing the school's annual goals.

6. Each elementary school will maintain a high quality pre-school.

Strategies

- 6.1 The pre-school will be housed in a desirable facility and integrated with the daily life of the elementary school.
- 6.2 The pre-school will utilize an evidence-based curriculum and promote its role in academic preparation.
- 6.3 The pre-school tuition will be set to create a positive cash flow to the elementary school.
- 6.4 The pre-school will continually emphasize the connections to the elementary school's kindergarten and grades beyond kindergarten.

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IV. OPERATIONAL VITALITY

A. Enrollment Management

OBSERVATIONS

1. Between the 2000 census and the 2010 census, the overall population of the Diocese declined by 19,176 people (-2%). The population is projected to grow, albeit slowly, for the foreseeable future. The overall population is not projected to exceed the 2000 census total until 2025.
2. The population of school-aged children also declined between 2000 and 2010 and is projected to recover at a slower rate than the overall population. In fact, the age groups of 5 to 14 years old and 15 to 19 years old are projected to continue their decline through 2025. The 0 to 4 year old age group is projected to bottom out around the year 2015 and then grow a little in the years following.
3. The Nielson Company estimates that 43% of the overall populations in the Diocese age 25 and above have continued their education after high school. The US Census Bureau estimated that nationally, 59% of people age 25 and above experienced post-secondary education.
4. It is estimated that 26% of the total population of the Diocese of Erie is Catholic.
5. There is very little competition among Catholic schools outside of Erie County. Within the county, however, there is significant competition among some schools.
6. According to diocesan records, Catholic elementary schools captured 31% of the available Catholic children within the Diocese of Erie. Vicariates ranged from a high of 37% market share in the Northern Vicariate to a low of 19% share in the Western Vicariate.

Figure 26

Market Share

Vicariate	Fall 2014	2013-14		2013-14		Total K to 8 Market Share
	Number of Parishioners Ages 5-14 ¹	Total K to 8 Enrollment in Catholic School ² Number	Percent	Total Elementary Enrollment in Religious Education ³ Number	Percent	
Northern	6,265	2,313	37%	2,456	39%	76%
Eastern	2,884	961	33%	1,871	65%	98%
Western	3,689	694	19%	1,321	36%	55%
Total Diocese	12,838	3,967	31%	5,648	44%	75%

¹ Data not reported for 16 parishes.

² Includes only Catholic students.

³ Does not include enrollments for the 16 parishes that did not provide age breakdown.

Source: Parish data forms October 2014 and Diocese of Erie

7. Throughout the entire Diocese, PreK-12 enrollment has declined by 14% (1,283 students) from 2009-10 to 2015-16. Overall, in 2015-16 the schools are operating at 71% of capacity.
8. Disaggregating enrollment numbers by Vicariate shows the Northern Vicariate experienced a 7% decline (394 students) from 2009-10 to 2015-16 while operating at 69% of capacity in 2015-16. Enrollments in the Eastern Vicariate declined 20% (422 students) and the schools

are operating at a capacity of 54% in 2015-16. The Western Vicariate experienced a 29% decline (467 students) in enrollment and are operating at 62% capacity in 2015-16.

9. Elementary enrollment declined in every grade in each Vicariate from 2009-10 to 2015-16. Of significant concern is the decline in primary grades throughout the Diocese which will have an impact for years to come.
10. High school enrollment in the Northern Vicariate, however, has remained stable, even increasing slightly, since 2009-10. Those three high schools are operating at 92% of capacity in 2015-16.
11. The two high schools in the Eastern Vicariate have experienced enrollment declines since 2009-10, with DuBois declining over 20% in that time period. The elementary and middle schools in that system have stabilized their enrollments recently and have shown modest increases. Elk County Catholic High School's feeder school enrollments, however, have declined significantly in the past 5 years.
12. Six of the seven high schools in the Diocese have a full-time position dedicated to recruiting students (DuBois Central Catholic High School's recruiter also has advancement responsibilities).
13. Nine elementary schools have a part-time enrolment manager.
14. With few exceptions, marketing and recruiting activities are minimal in both the elementary and secondary schools. Marketing is often thought of as advertising, missing the many layers of a comprehensive marketing approach. Word of mouth seems to be the predominate strategy for attracting new students but without a formal program to support and develop it. Open Houses are common and many schools participate in social media outlets. Only two schools (both secondary) identified a marketing/recruiting plan. One elementary school featured a recruitment bonus strategy that has largely been proven nation-wide as ineffective.
15. In many of the small towns outside of Erie, the issue is simply a lack of available students and/or the local distressed economy cannot fully support a tuition-based school.
16. Most principals track student attrition anecdotally and believe affordability to be the main cause of students leaving. However, without comprehensive exit interviews from neutral parties, affordability could be understood as a family not being able to afford the tuition or a family does not believe the school is worth the tuition. Even with significant amounts of EITC funding, schools with tuition assistance subsidies still have not been able to increase enrollment. It is also apparent schools that hold tuition low do not necessarily see better enrollment. The connection between tuition and enrollment is not well understood.
17. For the most part, schools in the Diocese do not have objective data identifying their reputation in the community.

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 A diocesan-wide marketing/recruitment/retention plan will be researched and developed to aggressively market Catholic schools.
 - The Diocese will collect the best ideas and study best practices around the country.
 - The marketing program will promote the mission and value of Catholic schools, identify and promote its proprietary strength and distinguish Catholic schools from other educational options.
 - The marketing program will be coordinated, comprehensive, and long-term.
 - A brand concept with tagline and logo will be developed and will serve as the foundation for the marketing effort.
- 1.2 Establish a position at the Catholic Schools Office with responsibility for assisting local schools to develop effective marketing programs. The person would also implement a diocesan marketing program that supports local efforts.
- 1.3 The diocesan 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 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 academic niche the school possesses. The plan will be submitted to the Catholic Schools Office annually for review and feedback.
- 2.3 The local school budget will include a line item to fund marketing initiatives.
- 2.4 The Catholic Schools Office will serve as a resource for developing local school marketing plans and will provide leadership, direction, and assistance 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. A program of personal invitations or word of mouth marketing will be formalized in each school.
- 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 will be familiar with public, private and cyber-school competition: 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 Schools will make effective use of professional communications, websites, multi-media and other technologies as part of the marketing plan.
- 2.12 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.
- 2.13 The Catholic Schools Office will contact the two Catholic universities within the Diocese to explore the creation of a new Catholic scholarship for students who have completed a K-12 Catholic school education and who have been accepted into one of the participating colleges or universities.

B. Finances

OBSERVATIONS: THE FINANCIAL PROBLEM

There is a general consensus that the current budgeting and financial planning process for Catholic schools is not functioning in a manner which will sustain and improve the quality and competitiveness of Catholic schools. Fundamental changes in that budgeting and financial planning process are critical to the health and growth of Catholic schools.

In simplest terms, most budget problems can be viewed as one of expense vs. revenue. With respect to expenses, there are relatively few areas where significant savings can be achieved, except where there are small classes that result in high per pupil cost. However, it is very clear that the problem on the expense side of the equation is not that Catholic schools are spending *too much*, but rather that they are spending *too little*.

For most schools, the operating and capital budgets do not fund educational programs at the level necessary or desired to fully realize the indicators of a healthy school. The most successful Catholic schools are those which have made, and continue to make, investments in human capital (competitive teacher salaries), technology, program improvements, professional development, recruitment, and modern, up-to-date, physical facilities. Lack of adequate funding is preventing schools from maintaining and improving their competitive edge. In short, there must be recognition of, and a commitment to, investing for the future. The budgeting process cannot be driven solely by currently available levels of revenue.

It is clear, therefore, that substantially greater revenues will be needed if Catholic schools are not to only survive, but to thrive. There are four components to this equation: tuition, EITC/OSTC and other third party sources, parish subsidies, and advancement.

Tuition: The tuition model must be changed from one which seeks to minimize tuition to one which seeks to maximize revenues. This requires a careful balancing of available financial assistance dollars against the impact of increased tuitions on families' ability to pay and, ultimately, enrollment.

Third Party Sources: EITC/OSTC and other external tuition assistance sources need to be pursued even more vigorously, so as to offset the impact of increased tuition levels on enrollment through needs-based financial assistance.

Parish Subsidies: Parishes provided \$4,638,500 in subsidies in 2013-14. However, these subsidies are unevenly spread throughout the Diocese. Some parishes without schools have established financial assistance programs for children in the parish who enroll at Catholic schools, but many have not. Ideally, substantial subsidies from parishes would not be necessary if tuition structure, third party sources and advancement were fully successful.

Advancement: Advancement efforts vary widely among schools. The most successful schools, however, have demonstrated that substantial advancement funding, both on an annual basis and for large capital projects, can be achieved. Each school needs to conceive and carry out an advancement strategy. The strategy must be both short term (annual funds) and long term (endowments) in nature.

The financial problems facing Catholic schools did not develop overnight, and neither will the solutions appear overnight. A systemic change will be the only way to achieve a new outcome. The following are specific observations about the themes presented so far. The observations refer mostly to Catholic elementary schools in the Diocese of Erie, although many of the observations are appropriate for systems of schools.

1. Tuition is significantly below cost per pupil. In 2013-14, average tuition in parish and multi-parish elementary schools is \$2,748 while average cost per pupil is \$4,510. The gap is more than what schools and parishes can fund, and the gap is understated because cost per pupil needs to rise to deliver a stronger education.
2. In 2013-14, parishes provided \$4,638,500 in subsidy to Catholic parish and multi-parish elementary schools. Most pastors express the current rate of subsidy is sustainable for the immediate future, although there is concern about long-term sustainability at current levels.
3. The budgeting process is ineffective in many schools because how schools budget does not motivate cost control or require a revenue plan to cover expenses. For most parish elementary schools, if the school does not cover expenses the parish will absorb the deficit, or the school will raid endowment funds, or current cash will be used for immediate expenditures without a plan to cover future expenses. In addition, schools are not incentivized to build savings, create surpluses through successful fundraising, or set aside funds for future capital projects.
4. The structures for fiscal accountability are weak. In parish schools, accountability rests with the pastor. In Diocesan schools and systems, the President and the Board of Directors are accountable. While the Diocese can see financial reports, Diocesan oversight is minimal until problems arise. A greater sophistication in financial planning is needed with oversight.
5. The value of a Catholic school has not been communicated or appreciated properly. Parents are increasingly focused on value, on getting, as it were, "their money's worth." In addition, the marketplace has been conditioned to expect a relatively low cost. Parents have not been conditioned to connect the cost of education with the life-long value of a Catholic education on their children's future.

6. Unanticipated student attrition and small classes result in inefficiency and higher costs. In some cases schools retain too many staff for the present enrollment, or try to continue traditional classroom education when a new approach could be more effective and affordable.
7. In most communities tuition does not represent the real value of a Catholic education, leaving a feeling for some that schools are not that valuable because they don't cost much. It has been shown in the Diocese that lowering tuition does not necessarily attract more enrollment.
8. The current tuition model, in which the price of tuition is less than the per pupil cost, subsidizes families of all economic levels whether they need it or not. Therefore, potential revenue from tuition is not realized.
9. The complexity of financial management requires a greater sophistication of financial planning and oversight than in the past. Any solution requires all the aspects of a vital school to come together: an outstanding product, marketing to convey the value of the product, recruitment that understands the marketplace and parents, advancement activities, and strong leadership.
10. As low as the elementary school tuition is for the first child, discounts for the second and third child are very often substantial, often 50% of first-child tuition. Size of family is not directly related to economic status.
11. Teacher and administrator salaries are significantly below teacher and administrator salaries in the public sector, at about 50% of local public school systems. While most principals stated they have been able to maintain a quality teaching staff, when pressed, all admitted to difficulties retaining young teachers, attracting specialized teachers, and a concern about the long-term as the veteran cohort of teachers retire. Attracting and then retaining the best quality teachers will become more difficult with current levels of pay.
12. Attracting and retaining top notch administrators can be a challenge. Administrator compensation is very low, especially given the very high demands to keep Catholic schools viable in a competitive marketplace.
13. It is common for parent and other school-related organizations to control saving or checking accounts separate from the school. Twenty of the 24 elementary schools not in a system allow such accounts.
14. Millions of dollars flow to Catholic schools through the EITC and OSTC programs. STAR Foundation alone directed \$2.4 million in funding scholarships to Catholic schools in 2015-16, and they are only one of several scholarship organizations helping Catholic schools. The Diocese itself provided \$450,000 for tuition assistance. Without this funding, many Catholic elementary schools would experience significant enrollment declines.
15. Individual schools need to assess their overall strategy for optimizing EITC/OSTC funds. It appears as though EITC/OSTC funds have been used primarily to hold tuition at artificially low levels. The result has been that EITC/OSTC revenues have replaced tuition dollars that would otherwise have been generated by a more appropriate tuition level. Thus, while EITC/OSTC funds have become an essential component of financing Catholic education, their availability has enabled some schools to avoid dealing with the issue of establishing appropriate tuition levels. The infusion of new money has not raised teacher salaries or improved education for students in significant ways.

16. The distribution of tuition assistance from EITC/OSTC is uneven and not always tied to a family's ability to pay. More discounts do not necessarily produce higher enrollment levels. EITC/OSTC funding can fluctuate from year to year, resulting in fluctuations in the final cost to families.
17. In many schools, the physical facilities have not been maintained and improved so as to be competitive with public school systems. The lack of capital investment has created a psychological effect, conveying decline and a lack of commitment to the future.
18. There are exceptions to the above observations, in which elementary schools have instituted budget controls, pay their teachers above the Diocesan scale, and have reduced subsidy while maintaining quality facilities and programs.

OBSERVATIONS: THE IMPORTANCE OF LEADERSHIP

Leadership is the single most important factor in maintaining the viability of a school. This statement is even truer for implementing the system-wide changes necessary to place Catholic schools on a sound and sustainable financial footing.

Achieving the revenue levels necessary to sustain and grow Catholic schools will require financial sacrifice, particularly in the near term. More will be asked of parents for the education of their children, more will be asked of Catholics without school-age children, more will be asked of alumni, and more will be asked of all Catholics who comprise the Diocese, including those at parishes without schools.

As the most successful Catholic schools within the Diocese and around the country have demonstrated, Catholics are willing to make sacrifices because they understand the benefits of Catholic education. But they need to be asked, and they need to be shown why a greater investment will make a difference.

There are many aspects to this message:

One, the need for Catholic schools in this day and age as a bulwark against a secular value system must be articulated clearly and repeatedly. In short, there is a much different need for Catholic schools today than when our immigrant forebears came to America.

Two, Catholic schools can thrive, and not merely survive, in this environment. The rapid growth of charter schools and other Christian-based schools demonstrates that there is not only a demand, but a yearning for value-based alternatives and faith-based mission that also provide an excellent education. Put differently, we must dispel any notion that we are taking a "hospice" mentality toward Catholic schools. On the contrary, the message must be one of hope and confidence in the future.

Three, parishes with schools need to be supported not only with words, but with real dollars and other support. Those parishes need to know that they are not on their own, but that their sacrifices are appreciated by the rest of the Diocese, and will be matched in kind with resources that they lack.

Lastly, the Diocese must be willing to take the administrative steps necessary to enable the sacrifices Catholics are being asked to make to bear fruit. Such sacrifices will not be forthcoming unless there is a clear, bold, and confident commitment on the part of the Diocese to implement the necessary administrative and governance changes. In sum, leadership is the key element to making this entire effort work.

GOALS AND STRATEGIES

1. Transition to a new tuition model in all schools.

Strategies

- 1.1 Actual revenue from tuition and fees will be 50% of school revenue within 5 years.¹ Schools close to 50% and above will strive for a goal in the range of 60% to 70%. For simplicity of accounting, the percentages now include EITC/OSTC funding even though it is not paid by parents. In the future, there should be a separation between parent funding and funding from external scholarship sources.
- 1.2 Every school will form a plan and timeline to make the transition. Plans will be submitted to the Catholic Schools Office which will consult with each school about managing the transition.
- 1.3 The Catholic Schools Office will enact a 3-year program to educate, monitor, and assist schools in developing financial projections and transition plans to the new model. Every school will develop a financial projection and use financial modeling to make decisions. Year-to-year decisions will be made in the context of long-range goals and a local strategic plan. The Catholic Schools Office staff or outside consultants will work with schools individually to build their financial projections and plans.
- 1.4 A well-executed marketing and public relations plan will be implemented 6 to 12 months before major tuition increases go into effect. This will clearly communicate the true cost of Catholic schools and the value of a Catholic education. Parents will understand the benefits to their children, and the options they have to ensure the price they pay is affordable.
- 1.5 Elementary schools in the same market will move together toward a new model. The goal will be for tuition rates not to differ more than 10% among elementary schools serving the same population.²
- 1.6 The multi-child discount will be adjusted over 5 years. By year 5, the multi-child discount will be 80% of full tuition for the second child and 60% of full tuition for the third child in the same family.
- 1.7 All schools will have a tuition covenant or agreement with parents that states the commitment of the school and parish to provide a Catholic education for their children and the commitment of parents to make a financial and personal investment in the success of the school. A sample covenant and process will be provided by the Catholic Schools Office.
- 1.8 An overview of the school budget and prior year-end financial statement will be presented and explained to parents each year so they understand the cost of education and see fiscal transparency. A thorough explanation will be provided of what tuition increases fund and how children benefit.
- 1.9 Schools will introduce visible improvements to coincide with major increases in tuition. There has to be a sense that children are benefiting when parents do more.

¹ Among parish and multi-parish schools, 17 of 24 were 50% or greater in 2013-14. Best practice among Catholic schools nationally has shown the majority of income should be tuition when schools serve traditional populations and utilize a tuition-based model.

² 10% is considered a reasonable variance. More than this and parents may have much incentive to shop for price rather than the best value and fit for their student.

2. Employ a new model of financial assistance.

Strategies

- 2.1 Financial assistance must be directed beyond only families in the lowest income group. An adaptable strategy which includes middle income families, multi-child families, etc., needs to be developed.
- 2.2 The amount of funding for financial assistance will be increased through sources such as: advancement program, EITC/OSTC funds, endowments, redirecting parish subsidy, and discounts given based on certain criteria.
- 2.3 Strategic financial assistance methods will be utilized as a means to extend the reach of other financial assistance programs. For example, employ unfunded tuition discounts to add students to under-enrolled classes.
- 2.4 Financial assistance scholarships that go beyond financial need will be considered. This approach will help achieve enrollment goals, recruit students from targeted populations, and attract donor specific scholarships.

3. Operate schools with efficient staffing levels and right-size the number of sections per grade as needed to maintain full classrooms.

Strategies

- 3.1 Pre-kindergarten programs are to break-even at least and preferably operate with positive income.
- 3.2 Schools should not split a grade into multiple sections unless the split is financially viable. A full class is understood to be 25 to 28 students with the caveat this might include a teacher and an aide in some lower grades. A small class is understood to be 15 to 18 students, below which the cost per student may be too much for the tuition being charged. When class size drops below 15, a financial viability review will be conducted.³
- 3.3 As enrollment changes, staffing levels will be adjusted to maintain a reasonable cost per pupil.

4. All schools will comply with the Diocesan salary scale by 2019-20.

Strategies

- 4.1 The Diocesan teacher salary scale will be reviewed by the Catholic Schools Office and a new scale will be published with timelines to move from approximately 50% of public schools salaries to a more equitable rate. The scale will be flexible to reference public school districts in the particular area where a school is located; in other words, there may have to be more than one salary system by geography. A five-year target will be established for all schools. The Diocesan salary scale will be considered a minimum scale which schools are encouraged to exceed.

³ Small classes as defined in this plan generally do not produce enough tuition revenue to pay expenses, that is the revenue needed from subsidy and fund raising to cover costs not covered by tuition is excessive and generally not realistic.

- 4.2 A review of benefits for Catholic school teachers and administrators will be conducted to determine if changes are needed. The review will produce recommendations and timeline for changes.
- 4.3 Each school will submit a plan for increasing all salaries. Most importantly, schools will show a responsible plan for growing revenue to cover salary increases. This should be a component of the school's financial projection and strategic plan.
- 4.4 The Catholic Schools Office will develop salary guidelines for school administrators.

5. Update accounting and budgeting processes to support the new model.

Strategies

- 5.1 Accurately determine the true cost of education in total dollars and per student. Accurately determine the cost of operating a classroom for Pre-K, K-5th grade, and 6-8th grade. This information will be used in communicating with parents, setting tuition, and carefully managing tuition discounts given by the school.
- 5.2 Parishes with schools will have school budgets and financial reports that break out school revenue and expenses from parish. The Diocesan Finance Office will recommend changes to financial reporting.
- 5.3 Accounting procedures will be adjusted to record and report EITC/OSTC funds from various sources. Identify separately tuition paid by parents from tuition grants received or given.
- 5.4 Schools and their sponsoring parishes will not be allowed to repeatedly deplete savings, reduce endowments, not pay the Diocese for expenses owed, or use funds restricted for other purposes to make up annual operating shortfalls. Pre-kindergarten programs and early childhood programs will be accounted for separately. Schools will be recognized as a ministry of all parishes.
- 5.5 Schools with consistent year-end deficits will come under the review of the Catholic Schools Office. A multi-year financial projection will be developed and approved by the Catholic Schools Office. Regular monitoring will be required by the Diocese.
- 5.6 The Catholic Schools Office will establish a dashboard of key metrics to monitor progress in Catholic school finances and other indicators of school health. These metrics will be constructed using established benchmarks, recommendations in the plan, and indicators of a healthy school.
- 5.7 Every school will develop a five-year financial plan for implementing the school's strategic plan and the *Strategic Plan for Catholic Schools*. The projection must include the steps necessary to achieve and maintain compliance with salary guidelines. It must be based upon realistic and credible enrollment assumptions and efficient staffing levels.
- 5.8 Parishes that own school buildings and all school systems and multi-parish schools will have a capital budget for facilities and other large maintenance expenses that go beyond the operating budget in any particular year. When a parish or school is able, a capital reserve fund will be established and funded every year by the operating budget. Additional funding can also come from special gifts and capital campaigns. Parish schools will have a capital reserve fund specifically for school facilities.

- 5.9 The Catholic Schools Office and Office of Finance will provide templates, tools and training to assist pastors, principals, business managers, and finance committees with the proper method to do budgeting and the mechanics of creating five-year projections.
- 5.10 The school budget will allocate financial resources sufficient to cover the costs of administering and executing the recommendations of this plan. Marketing, recruitment, and advancement activities will require staff support beyond the principal, which could be full-time or part-time personnel, shared staff with the parish, talented volunteers, or establishing ad hoc teams of lay experts for tasks.
- 5.11 All parent organizations will direct their accounting through the school business office or parish bookkeeper even though the funds might be for restricted uses.
- 5.12 Principals and school boards through their finance committees will be involved in the budgeting process.
- 5.13 Principals will receive timely financial reports on a monthly or regular basis. Principals will have a part in, if not be fully responsible for, monitoring expenditures and maintaining a balanced budget.

6. Parish subsidy will not exceed 40% of parish income.

Strategies

- 6.1 Parish subsidy will be kept at a level that allows the parish to operate a vibrant parish ministry. Ideally, subsidy for parishes with schools will be in the range of 25% to 40%, calculated as a percentage of parish ordinary income.⁴
- 6.2 Where parishes are part of a multi-parish school, school system, or a regional high school, a subsidy formula will be written and agreed to. The design of subsidy formulas should be consistent across the Diocese and allow for some adjustment to fit local situations.

7. All parishes will support Catholic schools and encourage families to consider Catholic school education.

Strategies

- 7.1 All parishes will share with schools information about their families and encourage families to consider Catholic schools.
- 7.2 The level of participation in funding Catholic K-12 schools of parishes without schools will be reviewed by the Diocese to ensure equitable participation by all parishes and a strategic use of the funds. A plan will be developed for how parishes will contribute and how funds will be used. The plan will keep funds from parishes within their vicariate or area of the Diocese. The Diocese will coordinate and administer the plan.

⁴ 6 schools were over 40% in 2013-14. Other schools range from 15% to 40%, with the median being 34%. Most schools and parishes can get below the maximum. Over time those at the high end should trend downward as new income is found from tuition, improved enrollment, advancement initiatives, and other funding sources.

C. Advancement

OBSERVATIONS

1. Advancement has been proven to be a critical component of funding successful Catholic schools.
2. In the Diocese, 14 of 25 parish elementary schools have an advancement committee or an advancement director (most part-time) on staff. Some elementary schools have both. All three school systems and six out of seven high schools have an advancement director on staff. One high school has an advancement committee, but no advancement director. The advancement programs range from sophisticated to weak.
3. Many elementary schools seem content to depend on EITC/OSTC for tuition assistance funding and the parish for unexpected deficits. As a result, the schools do not seem to engage in developing their own group of donors. In some cases EITC/OSTC is a disincentive for additional fundraising because tuition is relatively low.
4. EITC/OSTC is a continual effort of solicitation for donations. Some schools came late to EITC/OSTC and found they could not receive gifts because the cap was met. The law is changing and closely monitoring new changes will be important.
5. A previous attempt to develop diocesan-wide advancement programs in the schools reportedly did not realize its full potential due to lack of follow through, no accountability, and limited skills and time at the local school level.
6. Advancement efforts on a diocesan level are contained within the Stewardship and Annual Appeal Office and the Catholic Foundation, neither of which is education-specific.
7. All three school systems and six out of seven high schools have an endowment fund. These funds are all multi-million dollar endowments, ranging from \$2.7 million to \$8 million. On the elementary level, 18 out of 24 parish elementary schools have endowments ranging from \$15,000 to \$1.8 million.

GOALS AND STRATEGIES

1. **The Diocese will establish a comprehensive diocesan advancement program for Catholic school education to help develop and strengthen advancement programs in schools throughout the Diocese and build a culture of philanthropy among all constituents.**

Strategies

- 1.1 The Diocese will establish a diocesan advancement office either within the Catholic Schools Office or the Office of Stewardship and Development. The purpose of this office will be to provide assistance to schools for third-source funding and philanthropy and to serve as a diocesan ambassador for Catholic education among its constituents. Another approach would be combining the establishment of a school-specific advancement office with professional consulting services to fully train the office and bring immediate expertise to deliver the services listed below.
- 1.2 The role, responsibilities, goals and processes of the diocesan advancement office will be clearly defined and communicated to appropriate Catholic school constituents.

- 1.3 A diocesan case statement will be developed with related materials and documents to create a strong coordinated diocesan approach to Catholic education, emphasizing the value of Catholic education to all constituents. The diocesan advancement directors will use this case statement for diocesan public relations and ambassadorship at both the diocesan and local levels.
- 1.4 School/system advancement staffs will attend diocesan training sessions and participate in ongoing professional advancement opportunities. Advancement personnel from throughout the Diocese who have expertise in specific areas may help with these training seminars. The sessions will give advancement staff from throughout the Diocese a place to learn, to share resources, ideas and experiences, and to coordinate an approach among shared donors. Attendance will be required of all schools.
- 1.5 The diocesan training will provide assistance to schools/systems to establish and develop the following key advancement areas:
- a comprehensive advancement plan
 - a primary fund for charitable giving promoted year-round (*commonly referred to as an annual fund appeal*)
 - creation and maintenance of a permanent endowment
 - a memorial fund program
 - legacy cultivation
 - EITC/OSTC funding
 - grant writing
 - the art of cultivating and soliciting major gifts
 - leadership training
 - an annual report
 - a yearly advancement event for the benefit and promotion of the school/system
 - branding
 - coordination between advancement and marketing/recruitment activities
 - board training
 - volunteer training
- 1.6 The diocesan advancement office will prepare an annual advancement assessment document to help each school/system examine its current advancement programs and giving trends and to identify specific advancement goals. The diocesan advancement office shall be available to provide objective and professional counseling to help schools/systems with these reviews.
- 1.7 The diocesan advancement office will be empowered to expect accountability from schools.
- 1.8 The diocesan advancement office will advise schools/systems on new hires for advancement positions to ensure candidates possess appropriate credentials and experience and who understand the role of advancement in a not-for-profit environment.
- 1.9 The diocesan advancement office may offer consultative services to schools regarding major campaigns as specifically requested.

- 2. Every parish school and multi-parish school will have a person dedicated full-time or part-time to a local school advancement initiative. High schools and school systems will have a full-time competent advancement professional or professionals and an advancement office.**

Strategies

- 2.1 Every school/system will have an advancement committee working as an extension of its school board or advisory council. The committee will provide leadership for local advancement planning, yet at the same time the school board or council will understand its proper role to provide leadership with advancement initiatives. The advancement roles of pastor(s), principal(s), system president, board chair, advancement committee, advancement director, advancement staff, and volunteers need to be clearly defined for the school/system.
- 2.2 All schools will have trained and active advancement volunteers.
- 2.3 The advancement staff of each school/system will partner with the diocesan advancement office as described in Goal 1 above for training, professional development, yearly advancement reviews, and hiring.

- 3. All schools will have a comprehensive advancement plan.**

Strategies

- 3.1 Every school/system will create a written, comprehensive development plan and will utilize the diocesan training or, if necessary, professional services to develop the initial plan, or have advancement personnel attend a workshop for advancement professionals. (See www.partnersinmission.com or www.theadvancementcounsel.com.)
- 3.2 Develop strategies and goals for all essential parts of a comprehensive plan:
- Operation/database
 - Marketing, branding, and communications
 - Constituent relations
 - Volunteer management
 - Research
 - Stewardship
 - Special events
 - Annual fund
 - Major gifts/capital campaigns
 - Endowment/Planned giving
- 3.3 Fundraising activities will not continue to be the primary source for additional income. The number of school fundraisers will be limited and will be the responsibility of support groups.

4. Develop a strategic approach for solicitation of EITC/OSTC funds and maintaining donor relationships.

Strategies

- 4.1 Advancement will be intentional about donor relationships to sustain donor interest, giving levels and protect against donor interest rising and falling in future years to the detriment of schools. Be accountable to donors. Thank donors for their gifts. Intentionally strengthen donor ties. Educate donors on school needs.
- 4.2 Encourage donors to be flexible in use of their funds to the benefit of multiple schools. As often as possible, seek to direct the allowable 20% of EITC/OSTC funding beyond financial assistance to strengthen marketing, build advancement programs, bolster school programs, and support the school administrative teams. This would be implemented by STAR and any other Scholarship Organization under the control of the Diocese.
- 4.3 Be ready to capitalize on more giving potential if caps are raised. Cultivate donor interest ahead of time.
- 4.4 Encourage the various scholarship organizations helping Catholic schools to adjust the calendar so that awards are aligned with the annual recruitment cycle.

5. Every school and system will create and maintain a permanent endowment.

Strategies

- 5.1 Every school and system will create a permanent endowment which is legally dedicated solely to the support of the school.
- 5.2 The permanent endowment will provide that a percentage of the endowment balance on June 30 will be available for disbursement to support school activities during the following school year. Invasion of principal beyond such percentages will be prohibited except in exceptional circumstances.
- 5.3 Permanent endowments will be structured so that they legally cannot be diverted to another purpose, or be subject to claims by third parties against the parish, the school or the Diocese. This non-diversion feature is necessary to assure donors that their funds will not be applied in a manner which does not comply with their intentions.
- 5.4 The legal form of the permanent endowment may take the form of a free-standing foundation, a permanent account at a local community foundation, a permanent account at the Catholic Foundation, or such other form as is approved by the Diocese. In all cases, the permanent endowment will be structured so that contributions to the endowment will be deductible for federal income tax purposes.
- 5.5 The Diocese will make legal counsel available to each school to assist in the creation and ongoing maintenance of the permanent endowment.
- 5.6 To the extent necessary and appropriate, the Diocese will establish investment and reporting guidelines for permanent endowments. The guidelines may vary as to, and/or be inapplicable to, currently existing endowments which have an established track record of successfully operating a permanent endowment.
- 5.7 The school and each parish associated with the school (if applicable) will undertake an ongoing educational and promotional program to make parishioners, alumni and other supporters aware of the existence of the endowment and the tax advantages of contributing to the endowment, either during one's lifetime and/or by a bequest through one's will. Periodic written solicitations and other appropriate fundraising activities will be undertaken to solicit gifts to the endowment.

6. Anticipate a diocesan capital campaign which will include a Catholic schools component.

Strategies

- 6.1 The Catholic Schools Office will develop a list of needs and opportunities that could be funded through a diocesan capital campaign. Include the following areas when compiling the list:
- Educational initiatives that improve schools
 - Professional development
 - Programs that enhance Catholic identity
 - Facility needs
 - New school or renovations to restructured schools
 - Endowment
 - Tuition assistance
 - Programs to build enrollment and advancement initiatives

D. Facilities

OBSERVATIONS

1. If school facilities in the Diocese were placed on a continuum, buildings would be represented at each end of the string as well as most every spot in between. There are relatively modern structures or newly remodeled facilities at some schools, while others are trying their best in buildings dating from 1896 and 1924.
2. Only a few schools identified having a facilities master plan. A more professional approach is needed to facilities.
3. In an attempt to keep tuition low, some schools are deferring maintenance on their facility.

GOALS AND STRATEGIES

1. Each school will prioritize its long-term capital needs and projects in order to develop a facility master plan.

Strategies

- 1.1 Each school will conduct a facilities audit to determine areas of strength and need. The Diocese will provide expertise for those schools that need assistance.
- 1.2 Each school will create a facility master plan and update it on a regular basis (minimum every two years) as needs and programs change in the future. The master plan will be funded by several means: a capital improvement allocation in the annual operating budget, resources obtained by the school or parish advancement efforts through regular donations and/or a major capital campaign.
- 1.3 Each school will formulate a capital budget for the next five years. Support the budget with a plan to cover the costs which may include capital reserve fund, advancement activities, capital campaign, or parish investment.

- 1.4 Each school will develop criteria to determine priority levels as part of the capital needs assessment and facility master plan. These criteria could include, among others:
 - Address any/all health and safety issues
 - Meet the long-term needs of the school curriculum and programs
 - Have a positive impact on the number/percentage of students (enrollment and/or participation)
 - Have the potential to attract additional long-term support and donations
 - Have a positive impact on enhancing the school's image and marketing capability
- 1.5 The Diocese will give technical support to schools that need to develop and prioritize a master facility plan.
- 1.6 Planning for parish school facilities will be integrated with planning for parish needs.
- 1.7 When possible, new parish school facilities will be planned for flexible use so parish programs benefit year round while at the same time the school has appropriate space for its educational program.

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ADDENDUM

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Key Indicators of a Healthy School for the Diocese of Erie

Based on the
**National Standards and Benchmarks for Effective Catholic
Elementary and Secondary Schools**

In the Diocese of Erie, a healthy Catholic school or school system is expected to have the following key indicators. A school may not exhibit all the indicators at a particular time; however the expectation is that schools will have potential to realize these indicators and can demonstrate measurable progress toward them. The indicators are organized within the framework of the *National Standards and Benchmarks for Effective Catholic Elementary and Secondary Schools*⁵. The title statements are taken from the National Standards and the sub points are specific to the Diocese of Erie.

The key indicators provide a vision for healthy schools across the Diocese of Erie, a vision the Diocesan strategic plan for Catholic schools hopes to achieve. They also provide a foundation for strategic planning at the local level. As schools update their current strategic plans or formulate a new plan, the key indicators describe what every school strives to be. As schools conduct self-assessments and look at their school improvement plans, the indicators are meant to provide direction and establish a standard for achieving healthy status. The ways in which schools achieve a healthy status may differ depending on enrollment being small or large, location being rural or urban, or organization being parish or system.

MISSION AND CATHOLIC IDENTITY

1. National Benchmark: An excellent Catholic school is guided and driven by a clearly communicated mission that embraces a Catholic Identity rooted in Gospel values, centered on the Eucharist, and committed to faith formation, academic excellence and service.

Indicators for Diocese of Erie

- 1.1 The school is guided by a clear statement of its Catholic mission, including a focus on Jesus and an acknowledgement of the importance of spreading the Gospel.
- 1.2 The entire school community understands the mission and works to carry it out.
- 1.3 The school mission statement and symbols of the Catholic faith are visible throughout the school building.
- 1.4 Clergy and religious maintain a presence in the school whenever possible.

⁵ *National Standards and Benchmarks for Effective Catholic Elementary and Secondary Schools*, Center for Catholic School Effectiveness, School of Education, Loyola University Chicago, in partnership with the Barbara and Patrick Roche Center for Catholic Education, Lynch School of Education, Boston College. March 2012.

2. ***National Benchmark: An excellent Catholic school adhering to mission provides a rigorous academic program for religious studies and catechesis in the Catholic faith, set within a total academic curriculum that integrates faith, culture, and life.***

Indicators for Diocese of Erie

- 2.1 The Religion curriculum and instruction meets the religious education requirements and standards of the Diocese of Erie.
- 2.2 Religion classes are an integral part of the academic program in the assignment of teachers, amount of class time and the selection of texts and other curricular materials.
- 2.3 Religion teachers meet diocesan requirements for academic and catechetical preparation and certification to provide effective religion curriculum and instruction.
- 2.4 Faculty, staff and administration support and adhere to the official teachings, doctrine and laws of the Roman Catholic Church.
- 2.5 The Catholic faith and its implications are integrated into all subjects.

3. ***National Benchmark: An excellent Catholic school adhering to mission provides opportunities outside the classroom for student faith formation, participation in liturgical and communal prayer, and action in service of social justice.***

Indicators for Diocese of Erie

- 3.1 Students are offered timely and regular opportunities to learn about and experience the importance of prayer, the Eucharist, and liturgy.
- 3.2 Timely, regular, and age-appropriate opportunities for retreats and other spiritual experiences allow students to reflect on their life experiences and faith.
- 3.3 Every student participates in Christian service programs to promote the lived reality of social justice in action.
- 3.4 Administrators, faculty and staff serve as role models of faith and service for social justice.
- 3.5 The school culture welcomes and accepts students from diverse racial, ethnic, socio-economic and religious backgrounds.

4. ***National Benchmark: An excellent Catholic school adhering to mission provides opportunities for adult faith formation and action in service of social justice.***

Indicators for Diocese of Erie

- 4.1 Retreats and other spiritual experiences for the faculty and staff are provided on a regular and timely basis.
- 4.2 Administration and faculty assist parents/guardians in their role as the primary educators of their children in faith.
- 4.3 The school is an effective vehicle of evangelization and ongoing faith formation for students and their families. The school actively encourages Catholic school parents, students and staff to attend Mass and be involved in their parish.
- 4.4 All adults in the school community are invited to participate when appropriate in the school's Christian service program to promote the lived reality of action in service of social justice.

GOVERNANCE AND LEADERSHIP

5. ***National Benchmark: An excellent Catholic school has a governing body which recognizes and respects the roles of the appropriate and legitimate authorities, and exercises responsible decision making in collaboration with the leadership team for development and oversight of the school's fidelity to mission, academic excellence, and operational vitality.***

Indicators for Diocese of Erie

- 5.1 The school's Advisory Board represents the diversity of the school community and functions according to an approved constitution and bylaws.
- 5.2 The Advisory Board ensures fidelity to mission, continuity and sustainability through leadership succession.
- 5.3 The school values its relationship with the Bishop, accepts his authority, cooperates with the Diocesan Office of Education and adheres to diocesan policies.
- 5.4 The Advisory Board engages in formation and ongoing training and self-evaluation for itself and the administration to ensure the faithful execution of their respective responsibilities.
6. ***National Benchmark: An excellent Catholic school has qualified administration empowered by the governing body to realize and implement the school's mission and vision.***

Indicators for Diocese of Erie

- 6.1 School administrators meet national, state and diocesan requirements for school leadership preparation and licensing to serve as the faith and instructional leaders of the school.
- 6.2 The school administration articulates a clear mission and vision for the school, and engages the school community to maintain a school culture that embodies that mission and vision.
- 6.3 A vibrant collaborative spirit guides the relationship among the principal, teachers and staff.

ACADEMIC EXCELLENCE

7. ***National Benchmark: An excellent Catholic school has a clearly articulated, rigorous curriculum aligned with relevant standards, 21st century skills, and Gospel values, implemented through effective instruction.***

Indicators for Diocese of Erie

- 7.1 The curriculum adheres to appropriate, delineated standards and is vertically aligned to ensure that every student successfully completes a rigorous and coherent sequence of academic courses based on the standards and rooted in Catholic values.
- 7.2 The school is accredited by the Middle States Association of Schools and Colleges.
- 7.3 The curriculum is comprehensive in scope. Opportunities are provided to enrich the academic program and support the development of the whole child, including but not limited to music, international language, art, drama, physical education and athletics.
- 7.4 Curriculum and instruction for 21st century learning provide students with the knowledge, understanding and skills to become creative, reflective, literate, critical, and moral evaluators, problem solvers, decision makers, and socially responsible global citizens.
- 7.5 Current technology and educational resources are used effectively to enhance learning in an integrated manner throughout the curriculum.

- 7.6 Students are taught by qualified, certified teachers committed to the mission of the school and who are enthusiastic life-long learners using effective teaching methods.
- 7.7 Faculty and staff engage in high quality professional development, including religious formation, and are accountable for implementation that supports student learning.

8. *National Benchmark: An excellent Catholic school uses school-wide assessment methods and practices to document student learning and program effectiveness, to make student performances transparent, and to inform the continuous review of curriculum and the improvement of instructional practices.*

Indicators for Diocese of Erie

- 8.1 Appropriate analysis of school-wide and student data is used to monitor, review, and evaluate the curriculum and co-curricular programs; to plan for continued and sustained student growth; and to monitor and assess faculty performance.
- 8.2 Faculty use a variety of curriculum-based assessments aligned with learning outcomes and instructional practices to assess student learning, including formative, summative, authentic performance, and student self-assessment.

9. *National Benchmark: An excellent Catholic school provides programs and services aligned with the mission to enrich the academic program and support the development of student and family life.*

Indicators for Diocese of Erie

- 9.1 Guidance services, wellness programs, and behavior management programs provide the necessary support for students to successfully complete the school program.
- 9.2 Co-curricular activities provide opportunities outside the classroom for students to further identify and develop their gifts and talents and to enhance their creative, aesthetic, social/emotional, physical, and spiritual capabilities.

OPERATIONAL VITALITY

10. *National Benchmark: An excellent Catholic school provides a feasible three to five-year financial plan that includes both current and projected budgets and is the result of a collaborative stewardship.*

Indicators for Diocese of Erie

- 10.1 The school operates with a balanced budget, follows ethical principles in its business practices and adheres to diocesan policies regarding financial accounting. The budgets are filed on a timely basis and financial obligations are paid on a timely basis.
- 10.2 A realistic three to five-year financial plan and projection is updated annually.
- 10.3 Tuition, including all sources of tuition assistance (e.g. EITC/OSTC, endowment, etc.) and fees account for a minimum of 50% of annual revenue. Uncollected tuition is limited to 5% of billed tuition.
- 10.4 Schools have a preferred class enrollment of 20 to 25 students (maximum of 30 students) to ensure viability. The school retains 90% or more of its students each year.
- 10.5 Development and fundraising revenue equals 10% or more of annual revenue.

10.6 Schools take advantage of funds available from state and federal sources as well as EITC/OSTC funding, private foundations and corporate philanthropy. The school has an endowment fund which is regularly promoted.

11. National Benchmark: An excellent Catholic school operates in accord with published human resource/personnel policies, developed in compliance with diocesan policies and/or religious congregation sponsorship policies, which affect all staff and provide clarity for responsibilities, expectations and accountability.

Indicators for Diocese of Erie

11.1 The school provides just compensation for employees in accordance with diocesan policies.

11.2 All elements of school leadership – Pastor(s), Principal, Advisory Board – understand their respective role and fulfill their responsibility.

12. National Benchmark: An excellent Catholic school develops and maintains a facilities, equipment, and technology management plan designed to continuously support the implementation of the educational mission of the school.

Indicators for Diocese of Erie

12.1 The school facility is safe, attractive and in good repair. The facilities plan supports the educational program of the school and accessibility for all students.

12.2 The annual budget supports facilities, equipment, and technology management with specific funds for capital improvements and replacement.

13. National Benchmark: An excellent Catholic school enacts a comprehensive plan for institutional advancement based on a compelling mission through communications, marketing, enrollment management, and development.

Indicators for Diocese of Erie

13.1 The school develops and implements an advancement plan that addresses essential elements of annual fund, alumni support, major gifts program and planned giving.

13.2 The school establishes and implements a multi-year enrollment management plan that effectively addresses marketing for enrollment, recruitment activities, admissions policies and student retention.