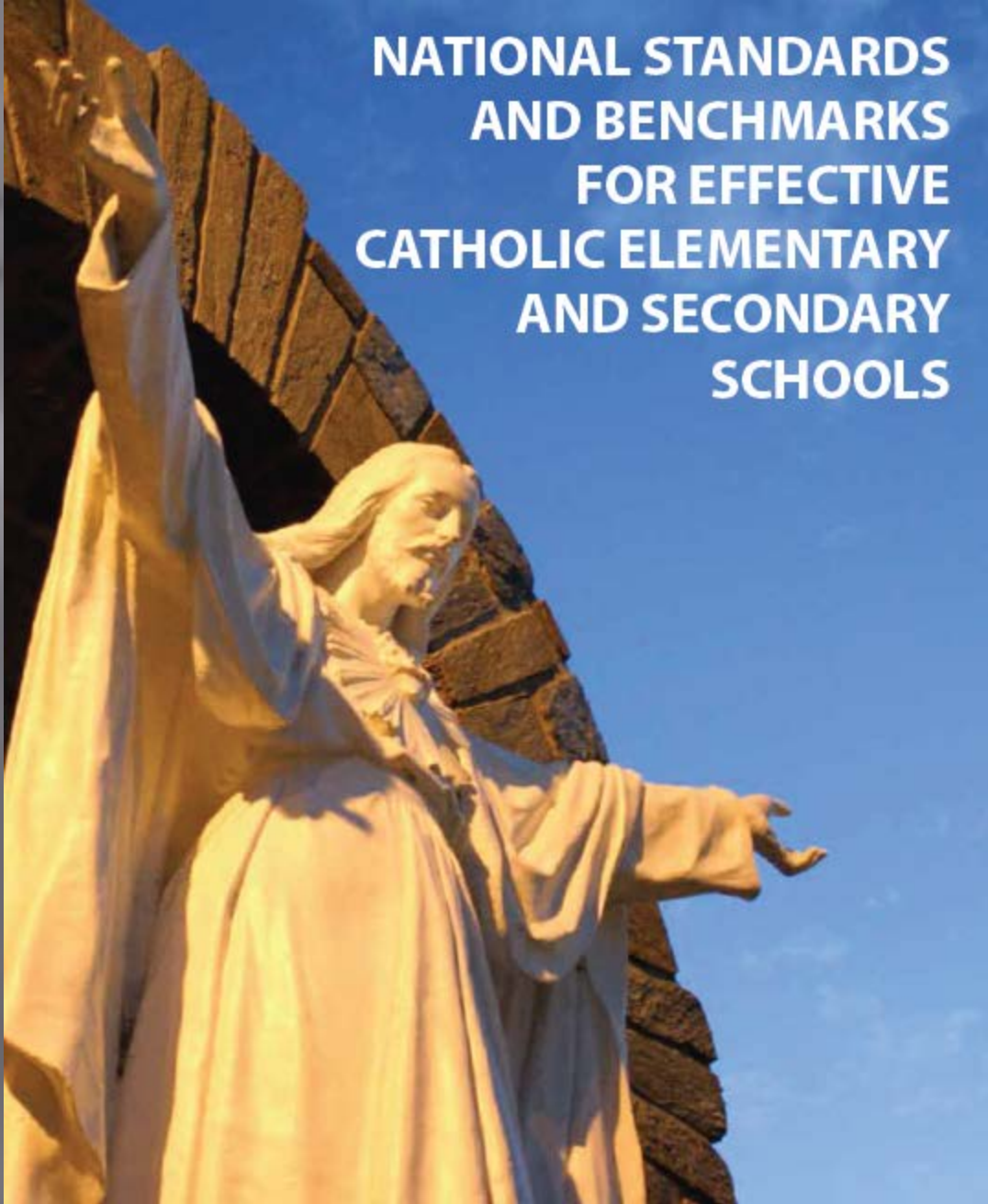


STRATEGIC PLANNING: USING THE NSBECS

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NATIONAL STANDARDS
AND BENCHMARKS
FOR EFFECTIVE
CATHOLIC ELEMENTARY
AND SECONDARY
SCHOOLS

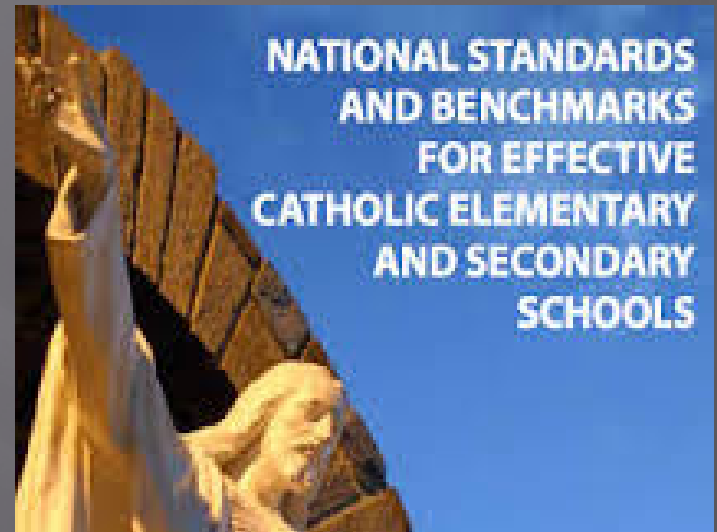
- Is your parish school seeking ways to better align all of its practices to our Catholic faith?
- Is your school leadership and commission developing or operating from a strategic plan that addresses *Mission and Catholic Identity, Academic Excellence, Operational Vitality, and Leadership/Governance*?
- Do you simply want to learn how accreditation, strategic planning and school improvement plans correlate?

Defining Characteristics

1. Centered in the Person of Jesus Christ
2. Contributing to the Evangelizing Mission of the Church
3. Distinguished by Excellence
4. Committed to Educate the Whole Child
5. Steeped in a Catholic Worldview
6. Sustained by Gospel Witness
7. Shaped by Communion and Community
8. Accessible to All Students
9. Established by the Expressed Authority of the Bishop

4 Domains

- I. Mission & Catholic Identity
- II. Leadership & Governance
- III. Academic Excellence
- IV. Operational Vitality



Considerations: *Why are we here?*



“Strategic planning is an effort to look at an organization in its environment and chart a future direction. ...Setting the organization’s strategic direction involves thinking beyond next year. But these days,

when change happens with increasing speed, it might be hazardous to think much beyond three to five years. Major goals and time frames established in a strategic plan will guide action in the desired direction and make it possible to monitor progress and, if necessary, to modify plans in response to new developments.”

Adapted from Lakey, Berit M. *Board Fundamentals: Understanding Roles in Nonprofit Governance*, BoardSource, 2010. Originally shared with Archdiocesan principals by Tom Kiely, Marquette University.

Strategic Planning...

IS...

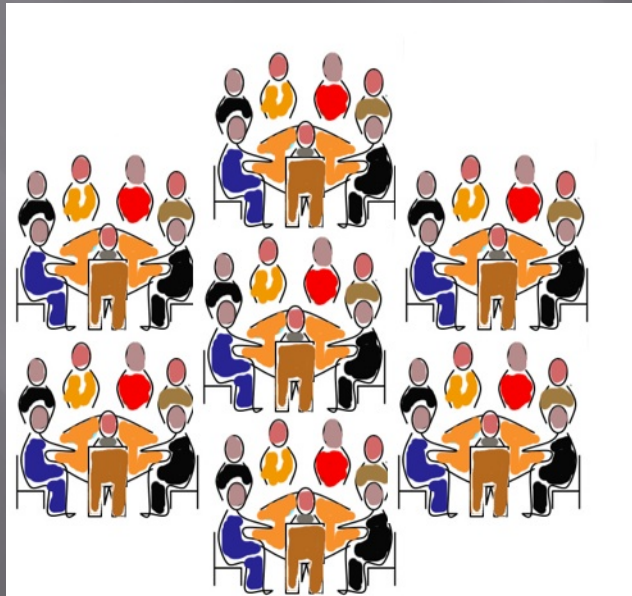
- ▣ Mission-driven
- ▣ Future-oriented
- ▣ Prioritized
- ▣ Inclusive of Measurable Objectives
- ▣ Analytical
- ▣ Creative
- ▣ Flexible
- ▣ Inclusive of Measurable Risk

IS NOT...

- ▣ “Ad Hoc” development
- ▣ Acting on whims
- ▣ Pursuit of funding streams without the end goal in mind
- ▣ A paper exercise to comply with expectations
- ▣ The sole responsibility of a pastor or principal



Who Are Our Partners?



Approaching Strategic Planning

1. Select a process
2. Develop a critical posture
3. Challenge the status-quo (role of the executive)
4. Focus on the subjective nature of your assessment: what works/what doesn't work
5. Seek out external analysis
6. Align strategy with processes to achieve them
7. Develop a team

Source: Dr. Tom Kiely, Marquette University

A Basic Process

- A. Initial meetings of School Commission, School Improvement Team &/or Parish Council
- B. Data Gathering: interviews, surveys, polls, etc. of stakeholders
- C. Determination of general themes
- D. Group visioning sessions
- E. Formation and draft of strategic plan using NSBECS: themes, goals, strategic objectives, tactics, measures, etc.
- F. Comment and discussion period
- G. Publication and celebration
- H. Execution and Monitoring

Adapted from Dr. Tom Kiely, Marquette University

Mission & Catholic Identity

STANDARD

1

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.

BENCHMARKS

- 1.1 The governing body and the leader/leadership team ensure that the mission statement includes the commitment to Catholic identity.

- 1.2 The governing body and the leader/leadership team use the mission statement as the foundation and normative reference for all planning.

- 1.3 The school leader/leadership team regularly calls together the school's various constituencies (including but not limited to faculty and staff, parents, students, alumni(ae) to clarify, review and renew the school's mission statement.

- 1.4 The mission statement is visible in public places and contained in official documents.

- 1.5 All constituents know and understand the mission.

OPERATIONAL VITALITY

- 10** 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 process, emphasizing faithful stewardship.
- 11** An excellent Catholic school operates in accord with published human resource/personnel policies developed in compliance with (arch)diocesan policies and/or religious congregation sponsorship policies, which affect all staff (clergy, religious women and men, laity and volunteers) and provide clarity for responsibilities, expectations and accountability.
- 12** 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.
- 13** An excellent Catholic school enacts a comprehensive plan, based on a compelling mission, for institutional advancement through communications, marketing, enrollment management, and development.

STANDARD

10

10.3

Financial plans define revenue sources that include but are not limited to tuition, tuition assistance/scholarships, endowment funds, local and regional partnerships, public funding, regional cost sharing, (arch)diocesan and/or religious communities' assistance, foundation gifts, entrepreneurial options and other sources not listed.

An...
pro...
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the result of a collaborative process, emphasizing faithful stewardship.

BENCHMARKS

10.1 The governing body and leader/leadership team engage in financial planning in collaboration with experts in non-profit management and funding.

10.2 Financial plans include agreed-upon levels of financial

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10.4 Financial plans include the delineation of costs for key target areas such as instruction, tuition assistance, administration, professional development, facilities, equipment, technology, program enhancement/expansion, capital projects and other planned projects.

Rubrics & Benchmark Rubric Worksheets

- ▣ <http://www.catholicschoolstandards.org/>
- ▣ [Strategic Planning June 2015\Guided-Process-Rubric-Scoring-Worksheet.pdf](#)
- ▣ [Strategic Planning June 2015\NCS Worksheet 10.3.pdf](#)
- ▣ [Strategic Planning June 2015\NCS Worksheet 10.3 COMPLETED.pdf](#)

How to Use the Guided Process for Rubric Scoring Overview

“Open the GPRS and download onto a computer. When a user clicks on the Benchmark textbox in Step 1, a drop down menu will allow the user to identify the benchmark to work on. When the Benchmark number is selected, the exact wording of the full benchmark will appear in the Identify your Benchmark box. For other boxes, users simply enter text; the boxes scroll to accommodate the content. “Save As” to keep the work. If a team Saves their GPRS worksheet on a platform where each can access it, they can return at any time to continue working.”

How to Use the Guided Process for Rubric Scoring Overview

When school teams use the GPRS in conjunction with the Benchmark Rubrics they are **guided through defined steps** that help them to:

- a) build a shared understanding of what the benchmark means for their school performance,
- b) develop a plan for gathering and recording evidence,
- c) analyze the evidence and summarize findings, and
- d) project next steps for school improvement.

When used online, the GPRS links directly with the benchmarks, rubrics, and other relevant resources on the Catholic School Standards Project website.

Standard 10 Benchmark Guidelines

Standard 10: 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 process, emphasizing faithful stewardship.

Benchmark 10.1 The governing body and leader/leadership team engage in financial planning in collaboration with experts in management and funding. [Download Benchmark Guideline 10.1](#)

Benchmark 10.2 Financial plans include agreed-upon levels of financial investment determined by the partners involved and not limited to parishes, dioceses, religious orders, educational foundations, the larger Catholic community, and responsible partners. [Download Benchmark Guideline 10.2](#)

Benchmark 10.3 Financial plans define revenue sources that include but are not limited to tuition, tuition assistance/scholarships, local and regional partnerships, public funding, regional cost sharing, (arch)diocesan and/or religious community contributions, entrepreneurial options and other sources not listed. [Download Benchmark Guideline 10.3](#)

Checkpoint!

Using the NSBECS, strategic planning up to this point has included:

- ✓ Themes
- ✓ Goals
- ✓ Strategic Objectives

Next steps:

- Tactics
- “Lead Agents” - Who is Responsible?
- Budget
- Timeline

Tactical Teams

Strategy	Tactics
Planning	Doing
Large Scale	Smaller Scale
Why	How
Difficult to Copy	Easy to Copy
Long Time Frame	Short Time Frame

Source: Dr. Tom Kiely, Marquette University

RESOURCES

Campbell, William J. S.M. Strategic Planning Survival Guide. National Catholic Educational Association, 2012

Kiely, Thomas, MA, MALS, DHL
Director, Institute for Catholic Leadership.
Marquette University: Milwaukee, Wisconsin
Thomas.Kiely@Marquette.edu

Lakey, Berit M. Board Fundamentals: Understanding Roles in Nonprofit Governance, BoardSource 2010

Trower, Cathy A. The Practitioner's Guide to Governance as Leadership: Building High-Performing Nonprofit Boards, Josey-Bass, 2013.

Institute of Lifelong Learning, Approaches to Strategic Planning
University of Leicester, available at
<https://www2.le.ac.uk/projects/oer/oers/lill/oers/fdmvco/module8/module8cg.pdf>