



Catholic Education

Integration of Catholic Identity, Operational Excellence, Finance, and Development in Creating a Vision for Catholic Education

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THE NATIONAL ASSOCIATION OF PRIVATE
CATHOLIC* AND INDEPENDENT SCHOOLS



Agenda...

- Integration and Vision
- Process vs. Solution
- Financial Decision Making
- The Structural Question
- Structures are not Strategies
- Foundations
- Pillars
- Conclusion
- School Revitalization





Integration and Vision ...

Integration of Catholic Identity, Operational Excellence, Finance, and Development in Creating a Vision for Catholic Education

- **Catholic Identity**
- **Operational excellence**
- **Finance**
- **Development**
- **Integration and Vision**

“A people without a vision shall perish.” (Proverbs 29:18)





Process vs. Solution ...

The process to achieve outcomes versus delivering the solution

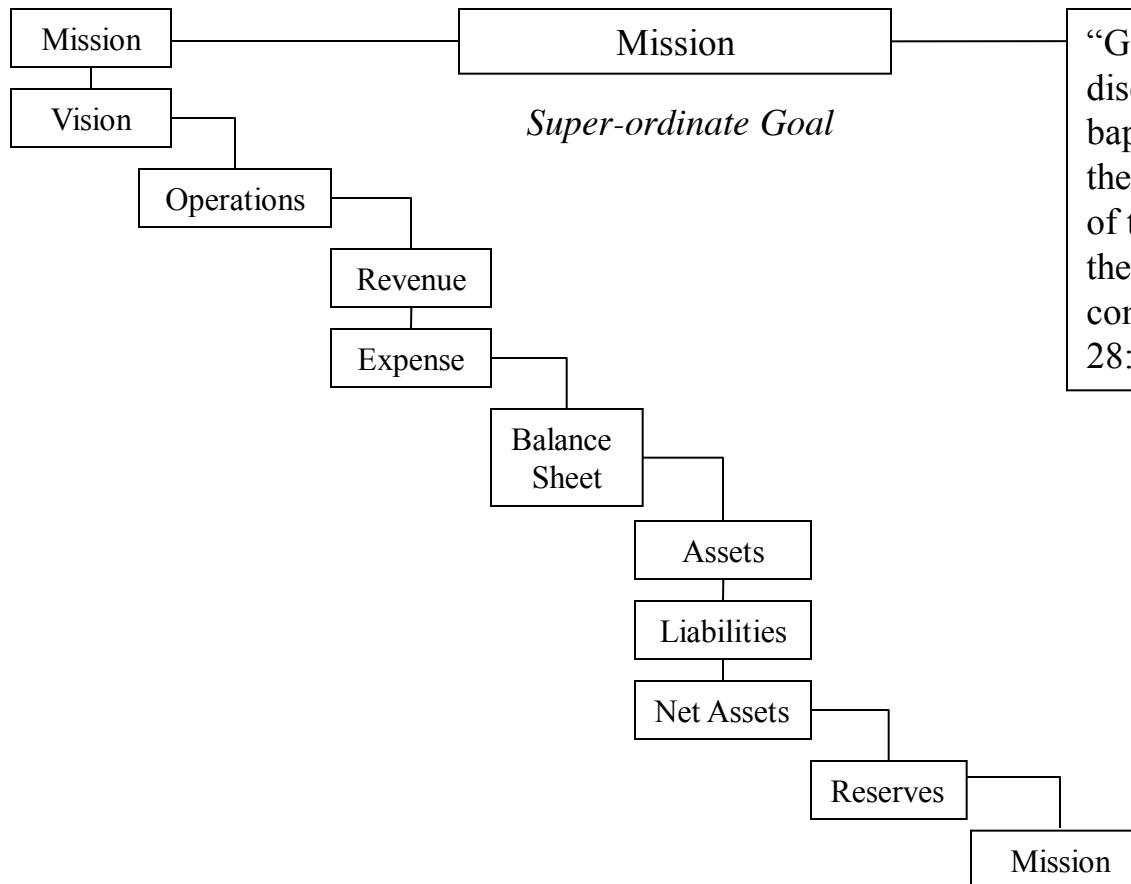
- Who has the most at stake - Who has the most to gain
- Patron Saint of this process is Doubting Thomas
- World view of spirituality vs. religion
- Ethos of Beauty & Tranquility – Bella Figura
- Apollo
- Christ





Financial Decision Making ... (Excerpt) ...

Financial decision making must first and foremost be made in the light of the vision and mission of the organization, and these must drive financial solutions





The Structural Question ... (Excerpt) ...

The structure of our juridic persons or juridic acts must be determined by our superordinate goals and informed by subordinate considerations

- **Super ordinate goal**
 - Mission
 - Vision
- **Subordinate Considerations**
 - Legal
 - Canonical
 - Civil
 - Financial
 - Operational



The Structural Question ...

Everyone who listens to these words of mine and acts on them will be like a wise man who built his house on rock. And everyone who listens to these words of mine and does not act on them will be like a fool who built his house on sand. (Matthew 7:24,26)

- **Stewardship**
- **Subsidiarity**
- **Mission**
- **Instrument**
- **Engagement**

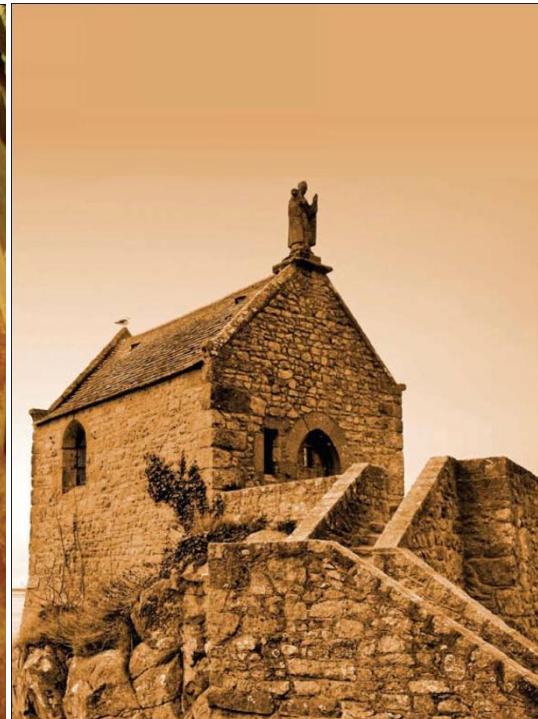




The Structural Question ...

By your work you show what you love and what you know. (St. Bruno)

- **Leadership**
- **Training**
- **Renewal**
- **Best Practices**





Structures are not Strategies ... The solution is not technical ...

The Technical Fallacy
The Rationalist Model of Management

- **Quantitative analysis has a built-in conservative bias**
- **Exclusive analytic approach run wild leads to an abstract, heartless philosophy**
- **To be narrowly rational is often to be negative**
 - Woman caught in adultery
 - Peter Drucker – “Professional management views itself in the role of Judge.”
 - John Steinbruner – “It is inherently easier to develop a negative argument than to advance a constructive argument.”
- **Fallacy: The expert is the analyst, not the person on the front lines.**
 - Rawleigh Warner, JR, CEO of Mobil Oil: In 1960, Mobil did not bid on an offshore oil tract in Prudhoe Bay... “The Financial People in this company did a disservice to the exploration people... The poor people in exploration were adversely impacted by people who knew nothing about oil & gas.”





Structures are not Strategies ... The solution is not technical ...

The Rationalist Model of Management, Part II

- **The rationalist manager does not value experimentation and abhors mistakes.**
- **Anti-experimentation leads inevitably to over-complexity and inflexibility.**
- **The rationalist approach does not celebrate informality (relationship).**
- **The rational model causes us to denigrate the importance of values.**
 - The Faith
 - Ethical Mores
 - Individuals
- **There is little place in the rationalist world for internal competition.
(Abundance Theory vs. Zero-Sum Game)**





Structures are not Strategies ...

The free movement of the will

- **We are not seeking a top down structured solution, we are seeking a facilitated solution.**
- **Dangers of paternalism**
 - Free acting person: “The movement of the will is voluntary” (*Summa Theologica*, Q.9, Art. 4)
 - Man can put this question (of the meaning of suffering) to God with all the emotion of his heart and with his mind full of dismay and anxiety, and God expects the question and listens to it...” (*Salvifici Dolores*, 13)
 - “... God who besides being omnipotence is Wisdom and—to repeat once again—Love, desires to justify himself to mankind. He is not the Absolute that remains outside the world, indifferent to human suffering. He is Emmanuel, God-with-us” (*Crossing the Threshold of Hope*, p. 94)
 - "God", he says, "is not pleased by blood - and not acting reasonably ($\sigma\ddot{\nu}\nu \lambda\circ\gamma\omega$) is contrary to God's nature. Faith is born of the soul, not the body. Whoever would lead someone to faith needs the ability to speak well and to reason properly, without violence and threats... (excerpt from the lecture of Benedict XVI at Regensburg University, September 12, 2006)

Lord make me an instrument of your peace - St. Francis of Assisi





Foundations ...

Stewardship

- **A way of life**
- **Practical form of spirituality**
- **A response to the Lord's call to discipline**
- **Grateful for all of God's gifts**
- **Accountable developing and using God's gifts**
- **Generous in sharing with others**
- **Willing to give back to God with increase**

Then Jesus said to them, “Give to Caesar what is Caesar's and to God what is God's.”
– Mark 12:17





Foundations ...

Subsidiarity

- Provides strategic solutions diocesan-wide in a parish-diocese relationship
- Coordinates chancery's efforts to engage and support parishes
- Supports the principle that affairs are best handled by those they affect most closely.

“...the salvation of souls, which must always be the supreme law in the Church.”
– *Code of Canon Law, 1752*





Foundations ...

Mission

- Church's mission should dictate finances rather than finance dictate mission
- God makes all things possible, beyond what most imagine
- Articulate a vision based on hope and light
- Make it a reality with purpose and faith





Foundations ...

Instrument

- **In the hands of the Holy Spirit**
- **Compelled to excellence**
 - always cognizant of our commitment to trust in the Holy Spirit
 - not in our own expertise and skills.
- **We remain mindful of the Lord, that He will make straight our path.
(Proverbs 3:6)**





Foundations ...

Engagement

- **Facilitate broad ownership of the mission of the Church**
- **Programs that are designed to engage the laity**
- **Encourage laity to become, not only personally committed to their faith, but themselves “workers in the vineyard” within their own parishes and dioceses**

"The renewal of the Church in America will not be possible without the active presence of the laity. Therefore, they are largely responsible for the future of the Church. "- Ecclesia in America, 157





Pillars ...

Leadership

- **Lead using the skills that we currently have and seek out those who can provide the skills we lack**
- **Alleviate the burdens of temporal challenges by implementing proven financial solutions**
 - Measure
 - Correct
 - Improve
- **Church leaders can focus more devotedly on the spiritual and corporeal needs of the people of God**





Pillars ...

Training

- Sustainable solutions require training that equips the people of God to take concrete and actionable steps to realize their vision for their local Church
- Fundamental training should build local ownership and enliven creativity





Pillars ...

Renewal

- **Strikes at the heart of the work O'Meara Ferguson does with each of our clients – conversion in the individual and the community**
- **Work we do renews what already exists rather than creating new programs and structures**





Pillars ...

Best Practices

- **Provide proven processes and results of the greatest efficacy**
- **Advance the mission of the Church**
- **Developed with serious consideration of current issues while tapping into a collective wealth of knowledge and experience**
- **Five proven methodologies for realizing goals are:**
 - Strategic Planning
 - Clear Communications
 - Individual Development
 - Efficient Operations
 - Effective Financial Management





Conclusion ...

Embracing a system wide process to achieve local solutions

- **Engaging in a system wide process that strengthens schools is the first step that strengthens schools financials**
- **Second step is implementing solutions**
- **Embracing the process to achieve local solutions without embracing the gnostic heresy is the challenge.**
 - Gnostics
 - Quest is romanticized
 - Eternal quest
 - Despises finding as bourgeois
 - Unknowable
- **All heresies are in someway a denial of the incarnation (Yves Congar)**
- **Myth vs. Christianity**

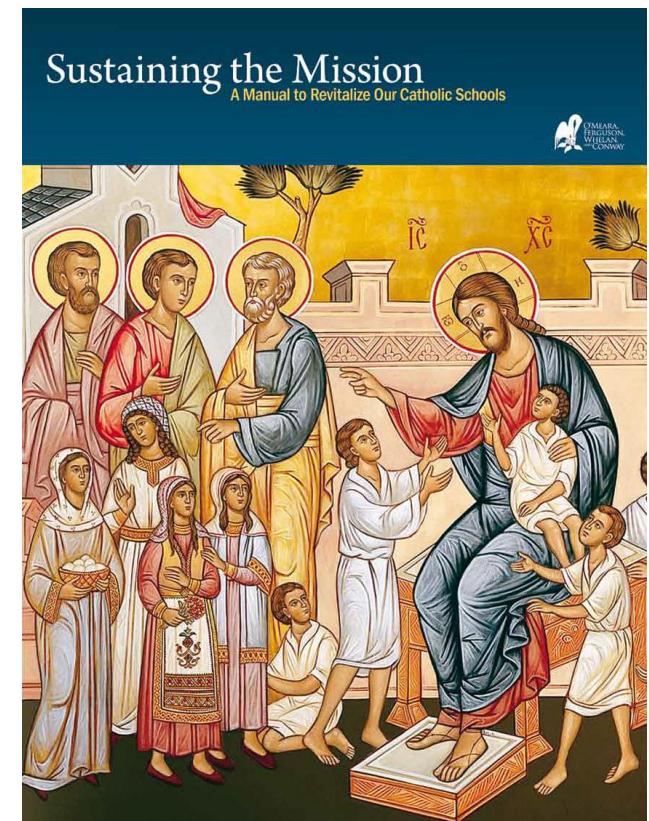




School Revitalization ...

*Sustaining the Mission: A Manual to Revitalize Our Catholic Schools
is a tool that sets out a process for understanding and re-rationalizing a school's
mission and vision*

- The following slides are snap shots of pages taken directly from the Manual.



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School Revitalization ...

Forward

At its June 2005 meeting, the United States Conference of Catholic Bishops (USCCB) approved the document, *Renewing Our Commitment to Catholic Elementary and Secondary Schools in the Third Millennium* (“*Renewing Our Commitment*”). This document is addressed to all bishops, priests, deacons, religious, and laity and urges them, “to continue to strive towards the goal of making ... Catholic elementary and secondary schools available, accessible, and affordable to all Catholic parents and their children, including those who are poor and middle class.” The document is in response to the Bishops’ call to, “the entire Catholic community ... to assist in addressing the critical financial questions that continue to face ... Catholic schools.”

In *Renewing Our Commitment*, the Bishops set forth four specific goals:

“Catholic schools will continue to provide a Gospel-based education of the highest quality.”

“Catholic schools will be available, accessible, and affordable.”

“The bishops will launch initiatives in both private and public sectors to secure financial assistance for parents, the primary educators of their children, so that they can better exercise their right to choose the best schools for their children.”

“Catholic schools will be staffed by highly qualified administrators and teachers who would receive just wages and benefits, as we expressed in our pastoral letter *Economic Justice for All*.”

United States Conference of Catholic Bishops, *Renewing Our Commitment to Catholic Elementary and Secondary Schools in the Third Millennium*, 2005, p. 1-17.

Ibid.: 1. *Ibid.*: 2

Ibid.: 11. *Ibid.*: 2.

Ibid.: 2. *Ibid.*: 2





School Revitalization ...

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School Revitalization ...

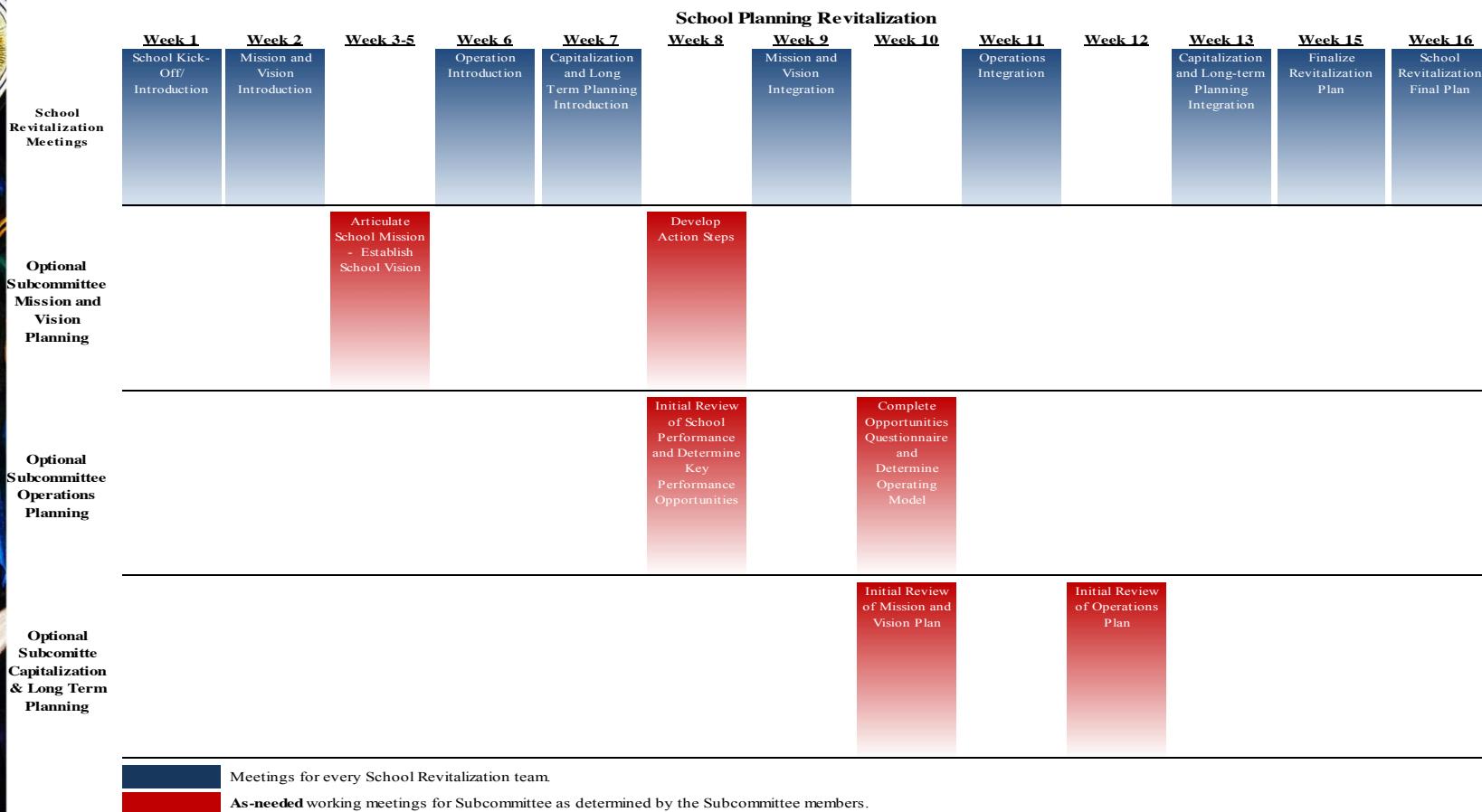
Timeline and Process Overview

The pyramid below puts the basic planning elements of the School Revitalization Process in their proper priority with Mission and Vision as the foundation of the entire planning process.



School Revitalization ...

Timeline and Process Overview





School Revitalization ...

Introduction

The Mission and Vision, rising from the gospel mandate to go out and teach all nations, is the foundational element of the School Revitalization Process. To achieve lasting and meaningful success, the School Revitalization Process must be truly Christ-centered. Christ is, in fact, the foundation and the center of Catholic Education. Without Christ as its center and purpose, the Revitalization Process becomes little more than a budgeting exercise. All of the efforts of this Process direct the participants back to Christ and seek to re-engage the faculty, staff, and entire school community into the life of His mystical body, the Church. The Mission and Vision work provides a framework in which decisions related to the temporal goods God has entrusted to the school will be made based upon principles of Christian stewardship.

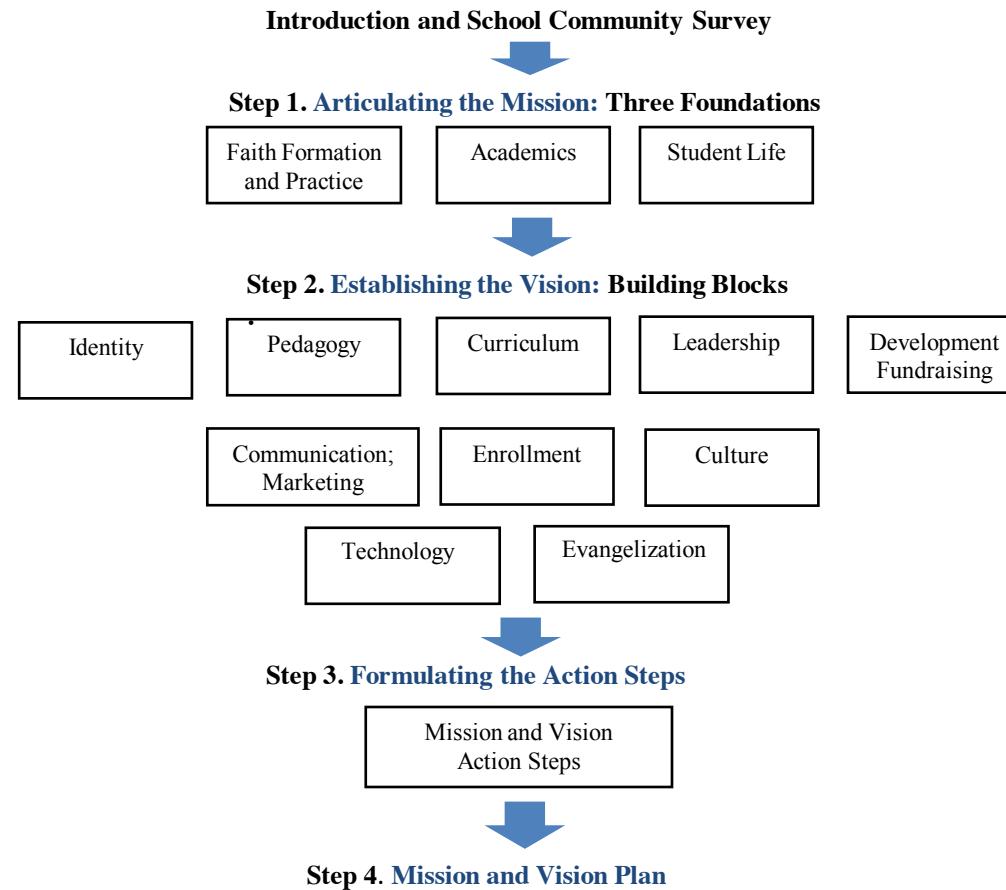
The primary purpose of each Catholic school is to foster and enliven the spiritual growth of its students, faculty, staff, and family members in Jesus Christ. One of the ways in which Catholic schools accomplish this is by encouraging students to participate in the sacraments, especially the sacraments of Reconciliation and of the Eucharist, which is the source and summit of the life and mission of the Church. Catholic schools have long provided access to the Church's sacraments and worship as well as assisted in the conversion of non-Catholics. Parents see service at Mass and the availability of the sacrament of Confession throughout various times of the school year as one of the greatest benefits of sending their children to Catholic school. Indeed, Catholic schools teach students the underlying doctrine of the sacraments and provide them with an atmosphere to probe and understand these realities more fully. The stories of priests and religious who first came to hear their calling to the priesthood or religious life while attending Catholic schools are innumerable. Catholic schools are a fertile ground for future vocations. Catholic schools have also traditionally provided students with opportunities to perform corporal acts of mercy by serving in soup kitchens, visiting the elderly, sending money to missions, and furnishing yet other ways of living out the Church's social teaching.





School Revitalization ...

Introduction



School Revitalization ...

School Background

School Name: _____

Principal: _____

Number of Staff: _____

Testing Scores

Standardized Test 1 (OLSAT):

Standardized Test 2 (TERA NOVA)

Standardized Test 3 (IOWA)

Standardized Test 4 (PSAT):

| | | | | | % change ('07 - '11) |
|------|------|------|------|------|-------------------------|
| 2007 | 2008 | 2009 | 2010 | 2011 | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Demographic Information

% of Catholic Students

% Receiving Aid:

Average Household Size:

Median Household Income:

Languages Used at School

Capitalization Information

- School Net Income
 - Enrollment
 - Sq. Ft./Student
 - Actual Square Footage

Other School Income

- Repairs & Maintenance

- Repairs & Maintenance
 - Salaries
 - Total School Expenses
 - Total School Revenues
 - Total Student Capacity
 - Tuition
 - Unused Capacity
 - Average Net Income/Student
 - Average Tuition/Student
 - Average Total Revenue/ Student
 - Average Total Revenue/ Sq. Ft.
 - Average Total Expense/ Sq. Ft.
 - Average Total Expense/ Student
 - Average Salaries/ Student Utilization %

Tuition/ Total Revenue



THE NATIONAL ASSOCIATION OF PRIVATE CATHOLIC* AND INDEPENDENT SCHOOLS



School Revitalization ...

Articulating the Mission: School Community Survey – Part I

Faith Formation and Practice

At the school...

| | | Poor | | Excellent | |
|-----|--|------|---|-----------|---|
| 1. | Religion classes are Christ centered and the core tenets of the Faith are well presented | 1 | 2 | 3 | 4 |
| 2. | Social justice service projects are part of the school's outreach | 1 | 2 | 3 | 4 |
| 3. | Teachers evangelize the students by word and example and encourage them in their turn to evangelize others | 1 | 2 | 3 | 4 |
| 4. | Catholic moral values are taught | 1 | 2 | 3 | 4 |
| 5. | Mass and Confessions are celebrated on a regular basis | 1 | 2 | 3 | 4 |
| 6. | Parents and the broader community are invited to learn about the importance of and participate in social outreach projects | 1 | 2 | 3 | 4 |
| 7. | The practice of the virtues is encouraged among the teachers, staff and students | 1 | 2 | 3 | 4 |
| 8. | The Church's doctrine on Catholic social justice is imparted | 1 | 2 | 3 | 4 |
| 9. | The Catholic Faith impacts the content and presentation of all subjects | 1 | 2 | 3 | 4 |
| 10. | There is proper emphasis on the teaching of the Liturgy and the Sacraments | 1 | 2 | 3 | 4 |
| 11. | Prayer instruction is part of the curriculum and the student body prays together daily | 1 | 2 | 3 | 4 |
| 12. | The students participate in Eucharistic adoration and devotions (Rosary, saints, etc.) are practiced | 1 | 2 | 3 | 4 |





School Revitalization ...

Articulating the Mission: School Community Survey – Part I

Academics

At the school...

| | Poor | | | | Excellent |
|--|------|---|---|---|-----------|
| 13. The teachers are well prepared | 1 | 2 | 3 | 4 | 5 |
| 14. The school possesses the technology it needs to enhance the students' learning experience | 1 | 2 | 3 | 4 | 5 |
| 15. The school possesses excellent textbooks and teaching aids | 1 | 2 | 3 | 4 | 5 |
| 16. The students are eager to learn, cooperative, respectful in the classroom | 1 | 2 | 3 | 4 | 5 |
| 17. There are educational after-school activities | 1 | 2 | 3 | 4 | 5 |
| 18. The subject matters are up to date/ varied | 1 | 2 | 3 | 4 | 5 |
| 19. The core subjects (mathematics, reading and writing, social studies, science) are focused on and well taught | 1 | 2 | 3 | 4 | 5 |
| 20. The level of instruction is high | 1 | 2 | 3 | 4 | 5 |
| 21. The teachers have access to ongoing formation | 1 | 2 | 3 | 4 | 5 |
| 22. The environment and atmosphere are conducive to learning | 1 | 2 | 3 | 4 | 5 |
| 23. Students perform well and achieve satisfactory grades | 1 | 2 | 3 | 4 | 5 |
| 24. Field trips and other learning activities are provided | 1 | 2 | 3 | 4 | 5 |





School Revitalization ...

Articulating the Mission: School Community Survey – Part I

Student Life

At the school...

| | Poor | Excellent | | | | |
|-----|---|-----------|---|---|---|---|
| | | 1 | 2 | 3 | 4 | 5 |
| 25. | There are high-quality offerings of art and music activities (i.e. band, chorus, drama, art) | | | | | |
| 26. | There is a broad offering of athletic activities to serve students with a range of needs, interests, and talents | | | | | |
| 27. | Students are encouraged to join other group activities (e.g. clubs, scouts, etc.) as well as form new groups consistent with the school's mission | | | | | |
| 28. | The counseling services are consistent with Catholic moral principles and staffed by competent personnel | | | | | |
| 29. | The faculty and staff foster a positive and welcoming environment | | | | | |
| 30. | The clergy make themselves available to the school and are seen frequently on campus | | | | | |
| 31. | The afterschool program provides a safe environment at a reasonable price | | | | | |
| 32. | Parents are committed to the school and volunteer their time | | | | | |
| 33. | The grounds and facilities are well maintained | | | | | |
| 34. | The school environment is safe and conducive to learning | | | | | |
| 35. | There is a strong sense of community and fellowship | | | | | |
| 36. | Catholic identity pervades the culture of the school | | | | | |





School Revitalization ...

Articulating the Mission: School Community Survey – Part II

Of the following ten descriptions, please circle the two that most accurately describe the school community (or you may consider writing your own in the space provided). Then answer the seven questions that follow.

1. Our school *faithfully teaches* – the entire content of the Deposit of Faith as handed down to us from the Apostles through the Magisterium of the Church
2. Our school *evangelizes* – provides a Catholic environment through which the students are evangelized and learn to evangelize others
3. Our school *worships* – as the source and summit of the Christian life, the Mass and the other sacraments are at the center of the school's activities and form the source from which it draws its identity and strength
4. Our school *educates* the whole person – teaching and forming the whole person in light of the Gospel of Jesus Christ
5. Our school *forms lives* – through the daily practice of the virtues and opportunities to assimilate the Catholic faith
6. Our school *fosters charity* – the school community is vibrant and nurtures bonds of friendship between students and families which are rooted in their relationship with Christ
7. Our school *reaches out* – to the broader community through service projects and opportunities to take care of the poor, needy and marginalized in society
8. Our school *prays* – students are taught to pray, practice prayer together daily and encourage others in the broader community to pray





School Revitalization ...

Articulating the Mission: Subcommittee Mission Foundations Survey

SUBCOMMITTEE SURVEY

(Use a scale of 1 to 5)

Academics

10. Professional development of the teachers
11. Standardized testing
12. Standardized test results are used as guides to improve the curriculum and student performance
13. Teachers' ability to motivate and inspire the students
14. Teacher's knowledge and understanding of subject matter
15. Teacher's ability to communicate subject matter to the students

| Rate how important this is to our school | Rate how much effort our school currently puts into this endeavor | Total Score |
|--|---|--------------------------------------|
| A <input type="text"/> | B <input type="text"/> | A + B <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |





School Revitalization ...

Articulating the Mission: Subcommittee Mission Foundations Survey

SUBCOMMITTEE SURVEY

(Use a scale of 1 to 5)

Student Life

20. Band, choir, drama club and other artistic activities
21. Social activities and clubs
22. Sports
23. Afterschool program

| Rate how important this is to our parish | Rate how much effort our parish currently puts into this endeavor | Total Score |
|--|--|--------------------------------------|
| A <input type="text"/> | B <input type="text"/> + <input type="text"/> = <input type="text"/> | A + B <input type="text"/> |
| <input type="text"/> | <input type="text"/> + <input type="text"/> = <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> + <input type="text"/> = <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> + <input type="text"/> = <input type="text"/> | <input type="text"/> |





School Revitalization ...

Articulating the Mission: Mission Foundation Examples

The following information on Faith Formation and Practice should help the Committee articulate its Mission:

“Go therefore and make disciples of all nations, baptizing them in the name of the Father and of the Son and of the Holy Spirit, and teaching them to obey everything that I have commanded you. And remember, I am with you always, to the end of the age.” (Matthew 28:19-20)

“But you will receive power when the Holy Spirit comes upon you, and you will be my witnesses in Jerusalem, throughout Judea and Samaria, and to the ends of the earth” (Acts 1:8)

“Having been born consequently out of being sent, the Church in her turn is sent by Jesus...thus it is the whole Church that receives the mission to evangelize, and the work of each individual member is important for the whole.” (Evangelii Nuntiandi, 14-15)

“The object of catechesis is communion with Jesus Christ. Catechesis leads people to enter the mystery of Christ, to encounter him and to discover themselves and the meaning of their lives in him.....The definitive aim of catechesis is to put people not only in touch but in communion, in intimacy, with Jesus Christ: only he can lead us to the love of the Father in the Spirit and make us share in the life of the Holy Trinity.” (National Directory for Catechesis, p. 55)

“People today put more trust in witnesses than in teachers, in experience than in teaching, and in life and action than in theories. The witness of a Christian life is the first and irreplaceable form of mission: Christ, whose mission we continue, is the ‘witness’ par excellence (Rev. 5; 3:14) and the model of all Christian witness. The Holy Spirit accompanies the Church along her way and associates her with the witness he gives to Christ (cf. John 15: 26-27). (Redemptoris Missio, 42)

“Jesus Christ taught that man not only receives and experiences the Mercy of God, but that he is also called to practice mercy toward others.” (Dives in Misericordia, 14)





School Revitalization ...

Articulating the Mission: Mission Foundation Examples

Consider the following suggested phrases, which may be appropriate for the Mission Statement of a School that emphasizes Faith Formation and Practice:

“Understanding that faith and reason are complementary, our school seeks to educate the students with a thorough catechesis and Christian formation...”

“Recognizing that many elements of the modern world are critical of faith perspectives, our school seeks to present the Catholic worldview in a manner that is uncompromising yet sensitive, relevant and contextual yet reflective of genuine catholicity...”

“Understanding that imparting the faith is more than ‘head knowledge’, our schools offer ways to deepen the faith response of our students both through the celebration of the liturgy and practical ways to express that faith both in the classroom and in the broader community...”





School Revitalization ...

Establishing the Vision: Subcommittee Vision Building Blocks Survey

SUBCOMMITTEE SURVEY *(Use a scale of 1 to 5)*

| | Rate how essential this is to achieving the overall Mission of the school | Rate how effective the school is at the following | Sum | Difference |
|-----------------|---|---|-----|------------|
| Pedagogy | | | | |

- 1 Teacher training in most current teaching methods (i.e. in-service, professional development)
- 2 Teacher's implementation of most current teaching methods
- 3 Teacher's ability to inspire and motivate the students to learn
- 4 Teacher's ability to communicate the subject matter

| | A | B | A + B | A - B |
|---|----------------------|----------------------|----------------------|----------------------|
| 1 Teacher training in most current teaching methods (i.e. in-service, professional development) | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 2 Teacher's implementation of most current teaching methods | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 3 Teacher's ability to inspire and motivate the students to learn | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 4 Teacher's ability to communicate the subject matter | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

