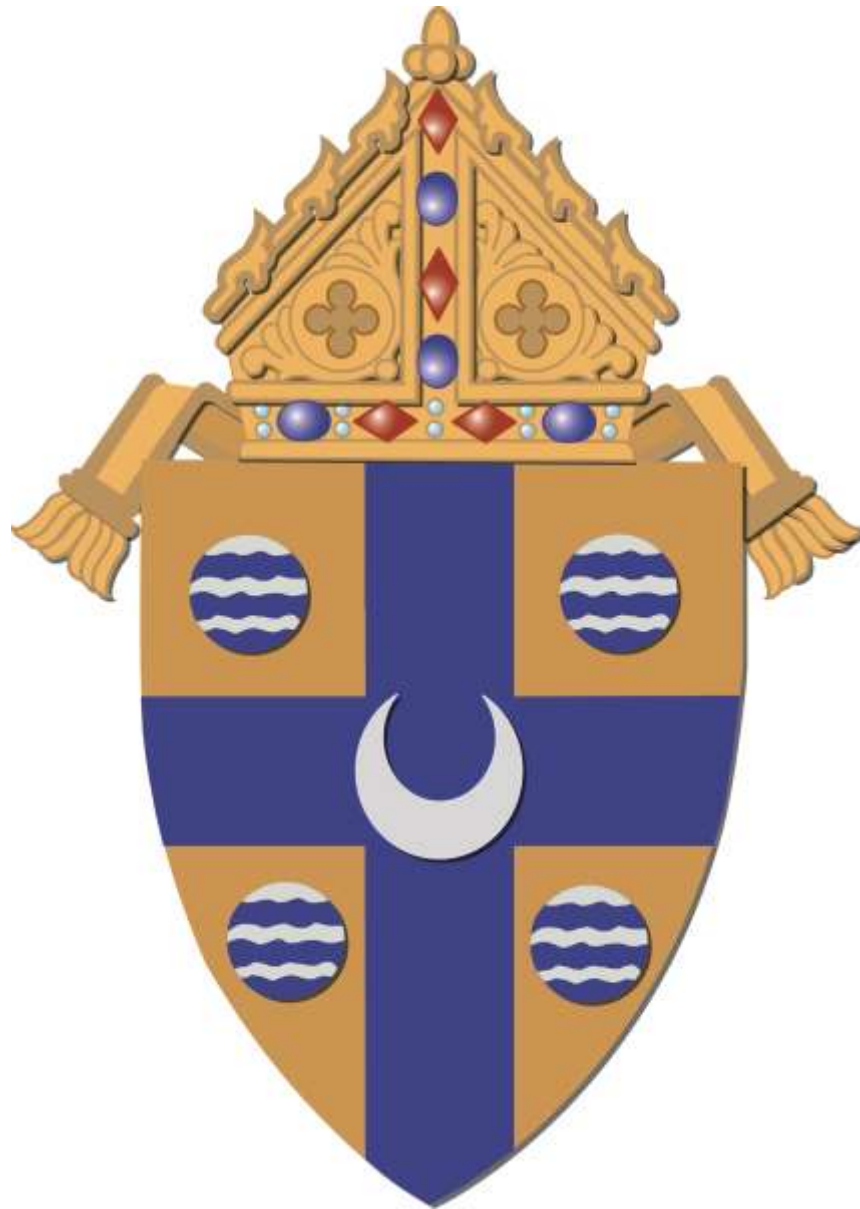


CATHOLIC SCHOOL
LONG RANGE PLANNING PROCESS



Diocese of Springfield in Illinois
Office for Catechesis

In the Gospel of Luke, Jesus gives us an example of the prudence and discernment expected of his disciples as they go about the work of building the Kingdom of God:

Which of you wishing to construct a tower does not first sit down and calculate the cost to see if there is enough for its completion? Otherwise, after laying the foundation and finding himself unable to finish the work the onlookers should laugh at him and say, 'This one began to build but did not have the resources to finish.' Or what king marching into battle would not first sit down and decide whether with ten thousand troops he can successfully oppose another king advancing upon him with twenty thousand troops? But if not, while he is still far away, he will send a delegation to ask for peace terms. – Luke 14:28-32

Our Catholic schools are an indispensable way in which the Kingdom of God is proclaimed and young people are formed as disciples of Jesus Christ. Thus it is only fitting that we diligently and thoughtfully plan for their future through a rigorous planning process that takes into account the spiritual, economic, and demographic realities in which our schools find themselves.

This renewed Long Range Planning Process is designed to aid you in these planning efforts by outlining a step-by-step planning method. Please be assured that the Office for Catechesis will continue offer its assistance; please do not hesitate to contact us.

May God continue to bless our Catholic schools!

Jonathan F. Sullivan
Director of Catechetical Services
Feast of the Annunciation, 2014

“All schools within the diocese are required to draft and maintain a long-range strategic plan; a copy must be submitted to the Office for Catechesis. The pastor, principal and school board will initiate and monitor the planning process while the staff of the Office for Catechesis serves as a resource in the planning process. The plan’s goals and objectives are reviewed yearly by the school board, committee or council and updated every three to five years.”

Handbook of Policies for the Ministries of the Office for Catechesis, §2811

PRELIMINARY STEPS

1. *Identify key stakeholders*
2. *Appoint a LRP Committee*
3. *Review and clarify the LRP process and timeline*

1: Identify key stakeholders

A variety of groups and individuals have a vested interest in the future goals of the school. Before choosing a LRP committee the school board, in cooperation with the parish pastoral council, should identify these individuals and groups so that they are adequately represented on the committee. All diligence should be directed at getting a “snapshot” of the total parish community so that all segments have a voice in the planning process. Care should be chosen to involve representatives with a variety of viewpoints and concerns; choosing a committee of like-minded individuals may result in a simple rubber-stamping of the LRP without the scrutiny necessary for a robust and healthy plan.

2. Appoint a LRP Committee

Once key stakeholders have been identified the school board should appoint a LRP committee to lead the process. This group should consist of

- Pastor or another delegated member of the clergy
- Principal
- Representatives from School Board (one of whom should also be appointed chair of the LRP committee)

- Representatives from the School Parent Association
- Representatives from the Pastoral Council
- Faculty Member
- Parents of current students
- Parishioners
- Alumni
- Others key stakeholders identified by the board

Ideally the pastor should make a personal invitation to each potential committee member, including a clear understanding of the individual's responsibility as a committee member. (See Appendix Two for a sample job description.)

4. Review and Clarify the LRP Process and Timeline

At the first LRP Committee meeting the members should review this document, especially Appendix Three, so that they clearly understand the process and timeline of their work. Committee members should be given the opportunity to ask clarifying questions and give additional input into the LRP process.

LONG RANGE PLANNING PROCESS

1. *Pray for Success*
2. *Review the mission statement*
3. *Access current school status*
4. *Access relevant demographic information*
5. *Analyze data*
6. *Draft goals and objectives*
7. *Seek community input*
8. *Finalize LRP and submit for approval*

1. Pray for Success

Before any planning process is undertaken, the LRP committee should pray to God for the success of the planning process. It is through the grace of God and the gifts of the Holy Spirit that the efforts of the committee are sustained; all meetings should begin with a request for these divine gifts. Appendix One offers a suggested prayer.

2. Review the Mission Statement

The LRP committee should review the school's mission statement (and, if the school has one, the vision statement) to ensure that it is still relevant to the life of the school. If no changes are necessary a simple vote to accept the existing mission statement is sufficient.

3. Assess current school status

Various aspects of the life of the school should be evaluated to identify areas of strength and areas of concern. These include

- A. Personnel & Governance
- B. Curriculum & Instruction (includes staffing and technology)
- C. Planning, Development & Enrollment (includes finances and marketing)
- D. Catechesis
- E. Facility & Safety
- F. Relationship of School to the Community

The Catholic identity and mission of the school should be reflected across all of these categories.

No more than 5-10 areas should be identified for each category.

4. Assess relevant demographic information

Select demographic information from the parish and community is vital for understanding how the surrounding community is changing and how the school must adjust to these changes. Census data, including population numbers, changes in race and ethnic makeup, and median household income can assist the planning process. Parish information, including membership numbers and the number of weddings and baptisms in recent years, can also contribute to the committee's understanding of future school enrollment trends.

5. Analyze data

Once relevant information has been gathered and compiled it should be shared with all committee members and time given for them to study the data. Meeting time should also be dedicated to allow committee members to ask questions about the data.

6. Draft goals and objectives

Once committee members have become acquainted with the relevant data it is time to draft goals and objectives. Ideally the LRP should contain 3 goals per area, with 3-4 objectives for each goal.

Goals are broad, measurable outcomes; i.e., “Increase enrollment by 10% in five years” or “Increase fundraising income by 33% in three years.” Objectives are actions that will help achieve the goals; i.e., “Implement a marketing plan” or “Establish an annual dinner and auction benefit.”

Each objective should be assigned to a responsible party, either a group or individual depending on the nature and scope of the objective. This party should be the group or individual who will be responsible for implementing the objective, i.e. not necessarily a member of the committee. The responsible party will be charged with developing an action plan for the objective.

Templates for writing and organizing your goals and objectives are available from the Office for Catechesis.

7. Seek community input

The parish and neighborhood community should be given an opportunity to review the proposed goals and objectives and give their feedback. The LRP committee should determine the most appropriate venue for this input.

8. Finalize LRP and submit for approval

Once community input has been gathered the committee should review any recommendations and edit the LRP as necessary. The finalized draft is then submitted to the pastor and parish pastoral council for final approval.

If the LRP is not approved, the pastor and pastoral council should identify areas of concern and offer their suggestions for appropriate changes to the draft plan.

IMPLEMENTING AND MONITORING THE PLAN

1. *Submit approved plan to the Office for Catechesis*
2. *Write action plans*
3. *Assess progress on a quarterly basis*
4. *Submit annual report*
5. *Update objectives and action plans as needed*

1. Submit Approved Plan to the Office for Catechesis

Your approved plan should be sent to the Office for Catechesis. A current and active LRP is necessary for successful completion of the diocesan Educational Review process.

2. Write action plans

A LRP is only as good as its implementation; if a plan is written and then stuck on a shelf it cannot help your school.

Once the LRP has been approved the objectives should be distributed to their responsibility parties, who in turn should draft an action plan for each item. These actions plans should be submitted to the principal in a timely manner.

3. Assess Progress on a Quarterly Basis

The principal, in cooperation with the school board, is responsible for monitoring the progress of each objective in the LRP.

4. Submit Annual Report

A short (ideally no more than one or two pages) report outlining the implementation of the plan in the last year should be submitted to the pastor and parish pastoral council at the end of each school year. The report should identify objectives that have been completed, objectives that are in progress, and objectives that are behind schedule.

This report should be as factual as possible and should *not* include any interpretation or commentary on the facts. The pastor or pastoral council may request additional information on the status of objectives.

5. Update Objectives and Action Plans as Needed

As the plan is implemented the school board may choose to update, add, or eliminate objectives in order to adapt to changing circumstances. Any amendments to the plan should be submitted to the pastor and parish pastoral council for their approval.

APPENDIX ONE: PRAYER FOR MEETINGS

We stand before you, Holy Spirit,
conscious of our sinfulness,
but aware that we gather in your name.

Come to us, remain with us,
and enlighten our hearts.

Give us light and strength
to know your will,
to make it our own,
and to live it in our lives.

Guide us by your wisdom,
support us by your power,
for you are God, sharing the glory of Father and Son.

You desire justice for all;
enable us to uphold the rights of others;
do not allow us to be misled by ignorance
or corrupted by fear or favor.

Unite us to yourself in the bond of love
and keep us faithful to all that is true.

As we gather in your name, may we temper justice with love,
so that all our discussions and reflections
may be pleasing to you, and earn the reward
promised to good and faithful servants.

We ask this of You who live and reign with the
Father and the Son, one God, for ever and ever.

Amen.

APPENDIX TWO: COMMITTEE MEMBER JOB DESCRIPTION

Appointment to the Long Range Planning Committee is a privilege; no individual has a right to sit on the committee.

Committee members are expected to

1. Attend all meetings of the committee, arriving on time and staying until the meeting is adjourned;
2. Give their full and honest input on matters relating to the committee's work;
3. Maintain confidentiality on the committee's work;
4. Work for the good of the Catholic community, putting aside any personal agendas and desires;
5. Remain open to the input and opinions of others, as well as the movement of the Holy Spirit.

Failure in these duties may result in dismissal from the committee.

APPENDIX THREE: SAMPLE TIMEFRAME

The schedule outlined below is designed to complete the full process in a condensed timeframe. Feel free to expand the schedule (for instance, your LRP Committee may meet every other week instead of every week), but it is not recommended to draw out the process longer than 6 months.

	Week	Recommended Actions
Preliminary Steps	Week 1	School board identifies key stakeholder groups and recommends committee members to pastor. School board sets committee meeting dates.
	Week 2-3	Pastor invites and appoints members of the Long Range Planning Committee.
	Week 5	First LRP Committee meeting; process is reviewed and clarified.
Long Range Planning Process	Week 6	Second LRP Committee meeting; mission statement reviewed, relevant financial, enrollment, and demographic data distributed.
	Week 7-8	Committee members review data.
	Week 9	Third LRP Committee meeting; data is discussed, brainstorming generates LRP objectives and goals.
	Week 10	Fourth LRP Committee meeting; LRP objectives and goals clarified and drafted.
	Week 11-12	Community input sought on objectives and goals.
	Week 13	Fifth LRP Committee meeting; community input analyzed and incorporated into LRP draft.
	Week 14	Final LRP Committee meeting; LRP draft finalized and approved by the committee. The draft plan is sent to the school board.
	Week 15	School board votes to accept the long range plan.

	Week	Recommended Actions
Implementing and Monitoring the Plan	Week 16-18	<p>Approved plan is submitted to the Office for Catechesis.</p> <p>Principal assigns goals to individuals or working groups (as appropriate); actions plans for each goal are generated and assigned.</p>
	Week 19 and on	<p>Action plans are implemented.</p> <p>School board reviews progress on a quarterly basis.</p> <p>Plan is amended as needed.</p> <p>Annual report submitted to pastor and parish pastoral council.</p>

APPENDIX FOUR: ADDITIONAL FORMS

These additional forms are not required as part of the Long Range Planning Process, but may be helpful in gathering, clarifying, and presenting relevant data to the committee and the wider community.

Baptisms

Analyzing recent baptismal activity in the parish can help identify future enrollment trends. These tables will help you project future Kindergarten enrollment based on these trends.

Tables are aligned such that each column represents a grade cohort.

	9 Years Ago	8 Years Ago	7 Years Ago	6 Years Ago	5 Years Ago	4 Years Ago	3 Years Ago	2 Years Ago	Last Year
# of Infant Baptisms									

Grade	4th	3rd	2nd	1st	K	
Current Enrollment						
% of Baptized per Grade						

Year		Next Year	+2 Yrs	+3 Yrs	+4 Yrs
Projected K Enrollment of Baptized					



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