

SCHOOL ADVANCEMENT PROGRAM



The purpose of the *School Advancement Program* is to assist school leadership by positively impacting the schools' **advancement** and operational **vitality**.

About the Office of Catholic Schools:

Purpose: Understanding each child is a Masterpiece of God, created with precision for a specific purpose, the Catholic Schools of the Archdiocese of Kansas City in Kansas provide an education that forms the whole person, so all may attain their eternal destiny and promote the common good of society.

Mission: The Office of Catholic Schools assists pastors, school leaders, and teachers in forming students that are joyfully Catholic, diligently achieving, and intentionally self-giving, **in environments that are prudently managed and forward thinking.**

Core Principles: Joyfully Catholic, Diligently Achieving, Intentionally Self-Giving, **Prudently Managed, Forward Thinking**

Prudently Managed: Schools are blessed by the financial gifts from benefactors, parishes, and fundraising. We utilize all finances to the glory of God by prudently budgeting, and incorporating strategic planning.

Forward Thinking: Schools continually use data, both historical and projected, to set a strategic vision and plan.

Desired Outcomes of the SAP:

- **Enrollment stability**
- **Financial solvency**
- **Sustainable advancement plan**

***Prudently Managed
and
Forward Thinking Catholic Schools!!***

PHASE 1: Board/Business Team Development

PHASE 2: Development/Fundraising

PHASE 3: Enrollment Management & Marketing

PHASE 4: Strategic Planning/Finances

PHASE 5: Sustainability

Current SAP Schools:

- **Christ the King Catholic School (Kansas City, KS)**
 - **Holy Cross Catholic School (Overland Park)**
 - **Holy Family Catholic School (Topeka, KS)**
 - **Holy Name of Jesus (Kansas City, KS)**
 - **John Paul II (Overland Park, KS)**
 - **Mater Dei Catholic School (Topeka, KS)**
 - **Our Lady of Unity Catholic School (Kansas City, KS)**
 - **Resurrection Catholic School (Kansas City, KS)**
 - **Xavier Catholic School (Leavenworth, KS)**
- *St. Matthew Catholic School (Topeka, KS)**
- *St. Patrick Catholic School (Kansas City, KS)**

School Advancement Program Commitment:

- **Advisory**
- **Focused engagement**
- **Open line of communication**

Participating Schools' Commitment:

- **Willingness to evolve**
- **Focused engagement**
- **Prepared to expand school advocates**



Phase 1:

School Board Business Team Development

Phase 1: School Board (BOT) or Business Team (SBT) Development First Steps

- Build or revitalize school board or business team
- Establish the framework and structure for board or business team meetings
- Utilize the bylaws (BOT) or best practice (SBT) to establish committees
- Determine the key first goals for each committee
- Create a school board or business team succession plan

Effective Catholic School Board or *Business Team* Management

- Mission and Vision Driven
- Promote Strategic Thinking
- Intentionally Structured
- Utilize “Best Practices” in Governance and Management
- Plans are Data Informed
- Collaborate at All Levels

Board of Trustees (BOT)	School Business Team or Council (SBT)
Mission Focused	Mission Focused
Policy Making	Policy Advising
Goal Driven	Goal Driven
Drives Fiscal Management	Advises on Financial Management
Conduct Principal Performance Review	Advise/Assist Principal
Engage in Strategic Planning	Assist in Strategic Planning
Promote the School	Promote the School



Phase 2:

Development Fundraising



Advancement: Moving your school from where you are, to where you want to be; fill (enrollment management), fuel (development), fund (fundraising).

Development: The strategic process by which schools identify, cultivate, solicit, recognize, and steward prospects and donors to establish and nurture relationships and to raise resources.

Fundraising: Any activity that brings dollars to your school (appeals, campaigns, grants, events).

Phase 2: Development/Fundraising First Steps

- Assess current school development processes
- Determine overall immediate revenue needs
- Create initial development plan for years 1-3
- Coordinate at least one annual signature event
- Spend as much time on event planning (fundraising) as donor engagement/experience and stewardship

A word on Marketing.....

- All marketing efforts aim to increase brand awareness, educate the audience, engage the audience and lead to the desired outcomes.
- All marketing efforts should be informed by the overall advancement plans and goals.
- A combination of traditional marketing, digital marketing, and in-person events should be utilized.



Phase 3:

Enrollment Management Marketing



Enrollment management
should be one of the school's
primary responsibilities - the
livelihood of the institution!

Phase 3: Enrollment Management & Marketing First Steps

- Identify a school enrollment manager
- Coordinate a common marketing brand consistent with the school strategic plan
- Determine the 2 best social networking platform(s) to engage your audiences
- Establish measurable goals
- Create an enrollment management timeline
- Formalize tracking of communication with families



Recruitment

- Go out and find prospective families
- Share your story and value proposition “in their words”
- Create a positive online presence
- Host admissions events year-round
- Invite families for tours

Retention

- Engage current families
- Create parent buy-in and involvement beyond fundraising
- Solicit parent feedback and measure satisfaction
- Employ timely re-enrollment practices
- Create meaningful contact points and keep track
- Involve teachers and staff



Phase 4:

Strategic Planning

Finances

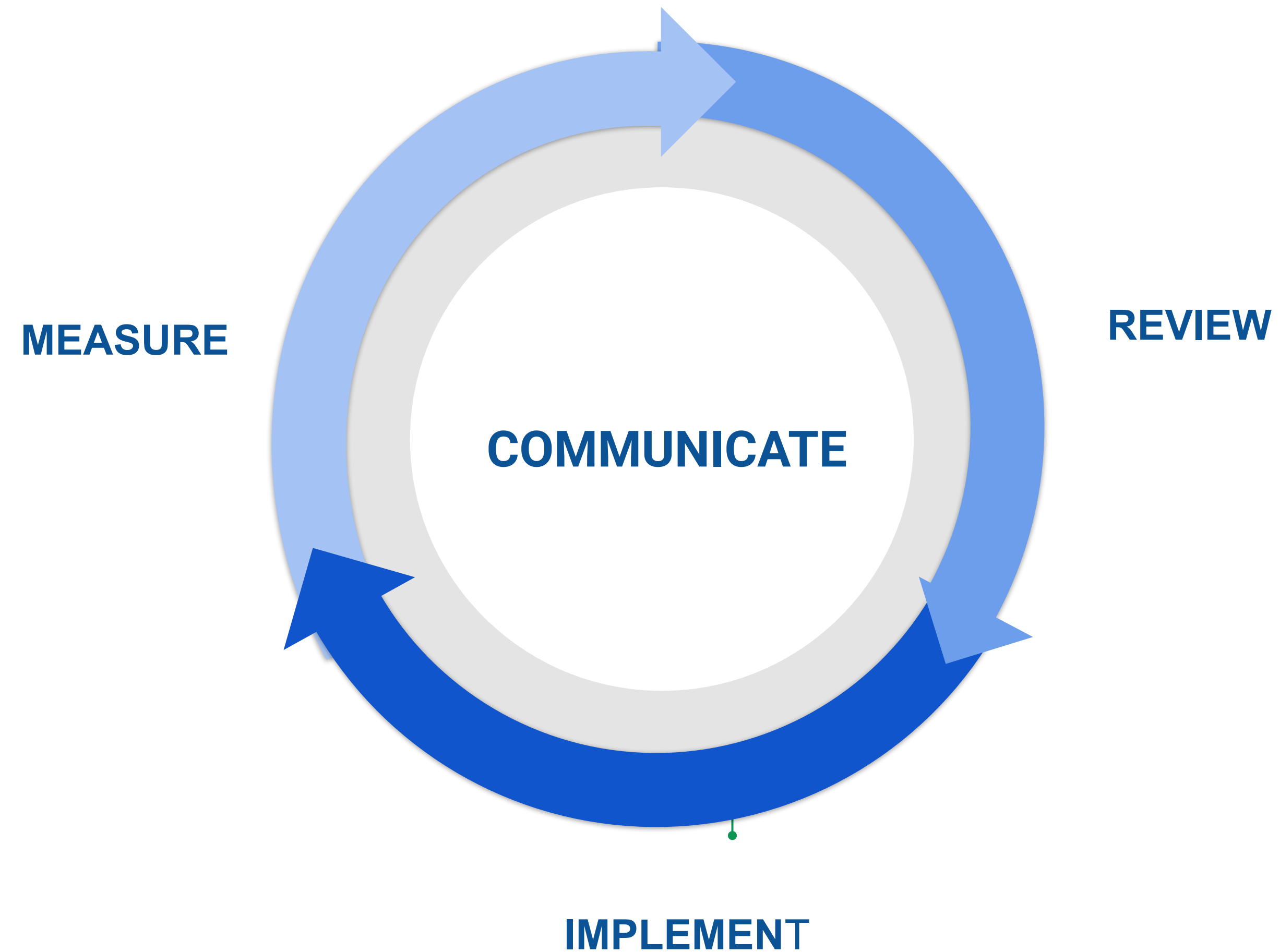


Phase 4: Strategic Planning/Finances

First Steps

- Review current strategic plan or if none exists, begin “readiness” steps to create strategic plan
- Determine if current strategic plan fulfills the mission of the school, accomplishes strategic goals and allows for the ability to serve the people intended.
- Establish a strategic plan timeline.
- Establish a budget timeline.

The Strategic Plan Success Cycle



Sample budget cycle:

- July: Fiscal year begins
- October: Major budget adjustments
- December: Distribute budget request form
- January: Budget draft created
- February: Budget draft shared with BOT/SBT
- March: Approval of parts
- May: Approval of budget

Gervasio, David. Running a Smooth Financial Operation in the Catholic Grade School or High School (2017) NCEA



Phase 5: Sustainability



“To fulfill your mission, therefore, you must lay its foundations in a way consistent with our Christian identity; establish means appropriate for the quality of study and research; and pursue goals in harmony with service to the common good.

A plan of thought and action based on these solid pillars will be able to contribute, through education, to building a future in which the dignity of the person and universal fraternity are global resources upon which every citizen of the world can draw.”

-Gravissimum Educationis (Pope Francis, 2018)

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