

A division of Christian Brothers Services

A partnership between Catholic Extension and Catholic School Management supporting the viability and vitality of Catholic schools in mission dioceses.

Strategic Management & Development Program



SMDP Objectives

Year 1 2011-2012

- Clarify Foundational Documents
- Prepare and Implement a Strategic Plan
- Initiate Marketing and Enrollment Analysis and Strategies

Year 2 2012-2013

- Prepare and Implement a Comprehensive Communication Program

Year 3 2013-2014

- Establish or Enhance Programs of Annual Giving
- Document Enrollment & Marketing Programs in an Enrollment Management Plan

Year 4 2014-2015

- Establish or Enhance Programs of Planned Giving to Build Endowment

Building a Vibrant Future for Schools

Diocese of Beaumont Catholic Schools

Monsignor Kelly Catholic High School, *Beaumont*

St. Anthony Cathedral Basilica School, *Beaumont*

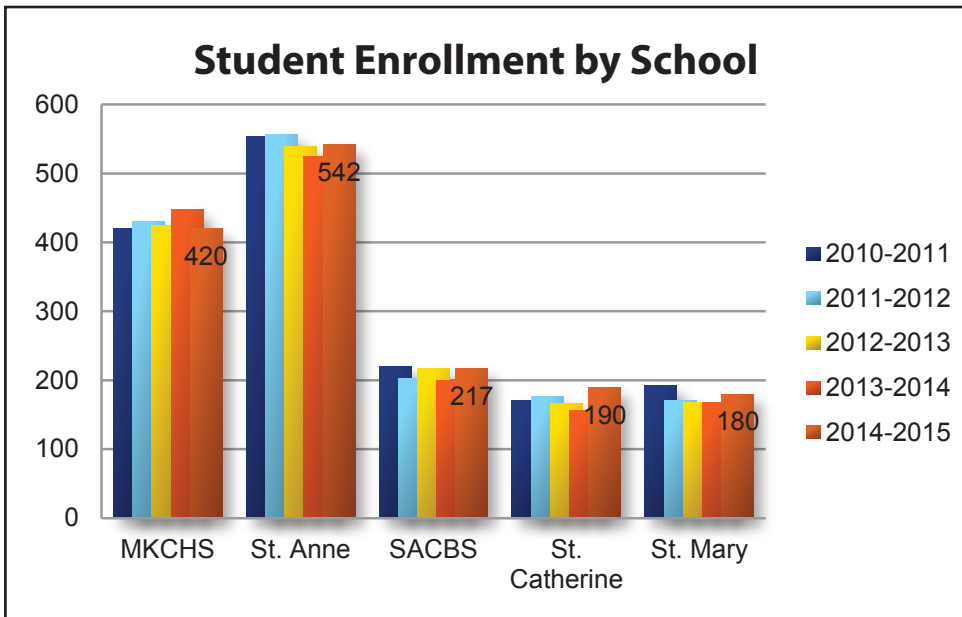
St. Anne Catholic School, *Beaumont*

St. Mary Catholic School, *Orange*

St. Catherine of Siena Catholic School, *Port Arthur*

The first historical reports of missionary priests in Beaumont date back to 1853, and the first baptism was recorded in 1875. The Diocese of Beaumont was officially established in 1966 at which time there were 3 high schools and 20 grade schools. Today, there are 4 grade schools and 1 high school remaining. These schools have withstood both Hurricane Rita in 2005 and then Hurricane Ike in 2008. They continue to weather

economic storms with a changing petrochemical industry, and they have assimilated to welcome growing Hispanic and Vietnamese populations. In school year 2014-2015, these schools opened their doors and provided a quality, Catholic education to 1549 students. That number is growing, as is the service these small but mighty schools provide to their communities.



All schools were in a state of declining enrollment upon initiation of the SMDP program. Enrollment in all schools stabilized, and all schools project enrollment increases for the 2015-2016 school year.

Marketing for Image and Enrollment ...combined with data-driven enrollment analysis

Starting with an enrollment management spreadsheet, schools use their own historical enrollment data by year and by grade to analyze enrollment trends, to calculate annual and 5-year average student attrition rates, and to use these averages to make annual and five-year enrollment projections. From this data, grade levels in need of specific retention strategies are identified, and CSM consultants work with SMDP committee members to design corresponding strategies to address

these findings. The spreadsheet is also used to capture exit interview data in order to identify trends for why families choose to leave a school. Again, corresponding strategies are put in place based on specific school circumstances. Clear understanding of a school's identity and differentiating factors are the basis for the crafting of a consistent marketing message to be used in all print and electronic communications for purposes of enhancing image and building overall recruitment and

retention efforts. The result of these efforts shows first in the reverse of negative enrollment trends, and then growth in enrollment, particularly at entry grade levels such as Prekindergarten or Kindergarten in the elementary schools, and Grade 9 for the high school. The high school is welcoming its largest freshmen class in more than 5 years which includes an increased percentage of students coming from Catholic partner elementary schools!

“It provided a complete and organized plan to improve the school.” *Volunteer*

“It provided a great template for the school to develop customized plans to fit our needs and culture.” *Board Member*

“Data gathering and review.” *Superintendent*

“Accountability.” *Principal*

What I liked
best about the
SMDP...

2015 Program Survey

Average Number of
Volunteers Engaged
at Each School

16

SMDP Working
Committees

1. Strategic Planning
2. Enrollment & Marketing
3. Communication
4. Annual Fund
5. Planned Giving

Planning and
Development
Committees of the
Advisory Board



St. Anne Catholic School Receives an SMDP Certificate of Completion
Pastor, Principal, Faculty, Board Members, Parent Volunteers, Superintendent and CSM Consultant

Engaging Volunteers *Catholic School Governance*

A fundamental premise of the SMDP is that Catholic school leadership has become increasingly complex. Maintaining an authentically Catholic and academically excellent school is only part of the scope of responsibilities of leadership. Significant attention must also be paid to strategic planning, communication, marketing, enrollment management, and development. The ability to provide staffing devoted to these key advancement functions is often limited and related to the size of a school. Smaller schools tend to have fewer staff and a smaller community

upon which to draw upon for support. The SMDP engages school staff, board members, and volunteers in committees to address the comprehensive institutional advancement needs of a school. Principals are empowered through their work with teachers, parents, alumni, parishioners, and others invested in ensuring the achievement of a school's mission and the overall mission of Catholic education. At Program end, SMDP Committees become part of a school's advisory board in order to perpetuate plans and best practices for the future.

Growing Resources *Communication & Development*

The goal of school development programs is engaged supporters who invest in the mission of the school. While all schools in the Diocese had built traditions upon successful annual events such as auctions and festivals, there was no consistency as to the presence of a comprehensive development program to include:

1. Opportunities for Annual Giving;
2. Opportunities to Grow Endowment through Planned Gifts.

The **first step** is to implement strategies to communicate with ALL school constituents on a regular basis, going beyond current parents to include past parents, grandparents, alumni parents, alumni, parishioners, prospective students/families, Catholics in the greater community, and local businesses. Print and electronic newsletters, annual reports, parish bulletin inserts and announcements,

brochures and other recruitment materials, and social media campaigns form the foundation of a calendarized communication plan. Keeping track of growth of constituent records in a school's database then informs both communication and development efforts and plans.

ALL schools have updated websites;

ALL schools have updated brochures and recruitment materials;

ALL schools have active Facebook pages;

ALL schools now have Annual Giving programs;

ALL schools have been supported by the Office of Catholic Schools in promotion of Planned Giving opportunities through receptions promoting these programs to local business owners and professionals.

Significant School Achievements

0

Number of schools not producing an Annual Report

232%

Percent of the dollar goal raised by St. Catherine of Siena School in their first Annual Fund

1st

Annual Fund established at St. Mary Catholic School

iPads

Locally grant-funded program for all Monsignor Kelly Catholic High School students

\$157,000

St. Anne Catholic School 2015 Annual Fund dollars raised



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Catholic School Management is a full-service, comprehensive, consulting organization supporting the educational ministry of the Catholic Church with research, direct consultative guidance, training programs and publications. Catholic School Management provides the highest level of professional and personalized service to Catholic educational institutions worldwide. Catholic School Management is committed to working with Catholic schools, Dioceses, parishes and religious communities, as well as School Boards, administrators, teachers, parents and volunteer leaders in order to ensure the quality, vitality and long-term viability of Catholic education. Consultants with extensive depth and breadth of experience carefully monitor current research and apply proven strategies to both consulting and training.

In order to make certain that Catholic schools not only survive, but flourish, the staff of Catholic School Management believes that careful planning, sound management and effective leadership are the cornerstones of educational excellence.