

# *St. Mary School - Strategic Plan 2023-2026*

## Table of Contents

<b>Introduction</b>	<b>6</b>
Mission Statement	7
School Philosophy	7
<b>Mission and Catholic Identity</b>	<b>7</b>
<b>Faculty/Staff</b>	<b>9</b>
<b>Curriculum</b>	<b>10</b>
<b>Facilities</b>	<b>11</b>
<b>Safety</b>	<b>12</b>
<b>Enrollment</b>	<b>13</b>
<b>Marketing</b>	<b>14</b>
<b>Advancement</b>	<b>15</b>
<b>Finances</b>	<b>16</b>
<b>Summary</b>	<b>17</b>









## INTRODUCTION

### *Background*

The Strategic Planning Committee (SPC) is established by the School Advisory Board. The SPC is given the responsibility to review the school's Mission Statement, provide a clear vision for the school, assess all aspects of the school, identify the primary strategic issues that affect the school's ability to achieve its goals, and provide action steps to address the issues identified in the planning process. An underlying goal of this planning process is to have the Advisory Board establish a mechanism to continually maintain a three-year "rolling" Strategic Plan. In order to kick-start that process this plan is somewhat ambitious in identifying and establishing objectives for both the near term as well as longer term, which will provide the Advisory Board with the runway to continue to build.

This amended Strategic Plan is the fifth one to be prepared since 2008. The first plan covered the period of 2008-2012, the second plan covered the period of 2013-2015, the third plan covered the period 2016-2019, and the fourth plan covered 2019-2022. This current updated plan covers the next three year horizon, 2023-2026. The intent is for the Strategic Plan to be updated annually in order to always maintain a three-year focus.

The goals and objectives of this revised plan have been prioritized by the Advisory Board as one, two, or three-year goals where applicable. Using the WCEA process and surveys for example, the Board continues to plan future goals based on continual input from all stakeholders.



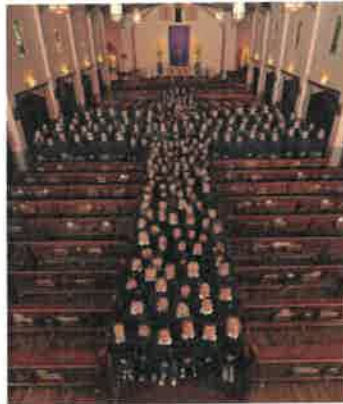
## Mission Statement

St. Mary of the Immaculate Conception School is a Catholic school in the Diocese of Oakland, which educates children in the Catholic faith and nurtures their minds, bodies, and souls, inspiring them to live the Gospel of Jesus Christ, achieve their highest academic and creative potential, and actively serve and enrich the community.

## School Philosophy

St. Mary of the Immaculate Conception School is a faith-based community consisting of clergy, staff, parents, and students who work together to foster the teachings and traditions of the Catholic Church. In partnership with parents, the school is committed to academic excellence and to educating the whole child: spiritually, academically, socially, physically and culturally.

The school provides a safe, secure, and welcoming environment that promotes a sense of self-worth and an acceptance of others as children of God. Each child is a unique gift from God with unlimited potential making the primary mission to nurture and develop students who are lifelong learners, independent thinkers, globally aware citizens, helpful and respectful individuals, and thoughtful Catholic leaders.



## MISSION AND CATHOLIC IDENTITY

### *Overview*

St. Mary School continues to strive to fulfill the Mission and Catholic Identity intended for Catholic schools which is to be a mission-driven, program effective and responsibly governed Catholic school. The National Catholic Education Association (NCEA) published the National Standards and Benchmarks for Effective Catholic Elementary and Secondary Schools (NSBECS) in 2012, in partnership with the Center for Catholic School Effectiveness, School of Education, Loyola University Chicago and in partnership with the Barbara and Patrick Roche Center for Catholic Education, Lynch School of Education, Boston College.

The NSBECS are becoming a part of the accreditation cycle with WCEA/WASC. Over the next three years, the St. Mary School community will learn more about these standards. Mission and Catholic

Identity is described by NCEA as: “The Church’s teaching mission includes inviting young people to a relationship with Jesus Christ or deepening an existing relationship with Jesus, inserting young people into the life of the Church, and assisting young people to see and understand the role of faith in one’s daily life and in the larger society. “This unique Catholic identity makes our Catholic elementary and secondary schools ‘schools for the human person’ and allows them to fill a critical role in the future life of our Church, our country and our world.” (The Catholic School on the Threshold of the Third Millennium, 1997)

There are four standards within the Mission and Catholic Identity domain. Within each standard are multiple benchmarks. The standards are:

- A. 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.
- B. An excellent Catholic school adhering to mission provides a rigorous academic program for religious studies and catechesis in the Catholic faith, set within a total academic curriculum that integrates faith, culture and life.
- C. An excellent Catholic school adhering to mission provides opportunities outside the classroom for student faith formation, participation in liturgical and communal prayer and action in service of social justice.
- D. An excellent Catholic school adhering to mission provides opportunities for adult faith formation and action in service of social justice.

## ***Goals & Objectives***

- Objective 1: Staff will incorporate clear Catholic Identity elements into SLEs.  
WCEA Goal A. Assessment of the Schools Catholic Identity
  - Integrate and align the new Religion standards with our current Religion curriculum in order to formalize scope and sequence across grade levels
- Objective 2: WCEA Goal B. Defining the School’s Purpose
  - Provide greater support for students to learn, know, and understand the SLEs
- Objective 3: St. Mary School will partner with parents by offering resources and opportunities for Catholic Family Life in the home and the parish, such as but not limited to, community Sacramental Opportunities, liturgical resources for families.  
WCEA Goal H. Resource Management Development
  - Offer more opportunities for our parents to support their Catholic Identity
- Objective 4: Our school community will build an engaging Parish-to-School and School-to-Parish connection grounded in Catholic Family Life.  
WCEA Goal H. Resource Management Development
  - Offer more opportunities for our parents to support their Catholic Identity
- Objective 5: Continue to increase student involvement in Parish events and masses
  - This aligns with NSBECS Mission and Catholic Identity Standard C



## **FACULTY/STAFF**

### ***Overview***

St. Mary School continues to attract, develop and retain quality staff at all levels. By retaining qualified and competent teaching staff, which are dedicated to the success and spiritual growth of each individual student, St. Mary School students will continue to succeed and thrive in everyday life.

Although St. Mary School has done well to support the staff, teachers have highlighted limitations on innovation and creativity due to inadequate space and inconsistent professional education programs. As staff and faculty are critical stakeholders in achieving the mission, it is important for the St. Mary community to demonstrate a commitment to the staff and faculty. One way is to expand opportunities to support their professional development.

For the upcoming Strategic Plan, St. Mary School SPC would like to continue to offer opportunities to develop a professional education program that encourages growth and expertise of the teaching staff, thereby making learning more effective. A budget and plan will be developed in conjunction with other pillars that can fund training, professional workshops and forums to share best practices.

### ***Goals & Objectives***

Create and identify funding sources for Faculty & Staff professional development (PD) by the end of 2026. - **WCEA Significant Goal H - Resource Management Development**

- Objective 1: Identify the appropriate amount and create a funding mechanism to provide on-going professional development for the staff. The use of the funds would be at the discretion of the Principal.
  - Determine if funding would be part of the advancement umbrella or part of the operating budget
  - Create a committee to look into title 2A funds (these funds need to be defined here if we keep this task)
  - Survey teachers to ascertain their need to create a budget amount
  - Research other schools' allotted amounts for PD

# CURRICULUM

## ***Overview***

St. Mary School continues to provide a very strong academic curriculum. The school benefits from a dedicated administration, faculty/staff and parent community, who all contribute to the successful development of the whole student (academic, spiritual, social, physical and emotional).

The St. Mary School community would like to continue advancing the school's academic programs, focusing on more innovative hands-on learning, technology integration and collaborative learning opportunities.

## ***Goals & Objectives***

Commitment to Continue the High Academic Curriculum Programs at St. Mary School:

- **Objective 1: WCEA Critical Goal #1:** Integrate and align the new Religion standards with our current Religion curriculum in order to formalize scope and sequence across grade levels
  - Faculty will learn the standards and implement catechetical instructional practices fully aligned to the USCCB and Oakland Diocese Religion standards
  - Professional Development and dedicated time will be provided throughout the year for faculty to achieve full alignment and implementation
- **Objective 2: WCEA Critical Goal #2:** Provide greater support for shareholders to learn, know, and understand the SLEs
- **Objective 3: WCEA Critical Goal #3:** Standardize data analysis and protocols
  - Dedicated, collaborative and structured time will be provided for faculty and staff to effectively analyze data to drive instructional plans, implement interventions and evaluate student learning
- **Objective 4:** Expand more electives for the after school programs including Interpersonal skills training
  - Parents Club continues to work on offering enrichment programs after school and the objective is to create a continuum or consistent program

## FACILITIES

### *Overview*

Under this strategic plan, the goals and deliverables of the Facilities Committee will be reflected in a facilities master list that will drive future capital improvements across campus. The facilities master list will specify action items that are identified and prioritized with consideration to safety, efficiency, cost, utility, viability, collaboration with the parish, parent and student input, California Department of Education Guidelines, and other relevant factors. The facilities master list will be a living document that will be updated regularly as the needs of the campus change. At a minimum, it will be reviewed and revised at the start of each subsequent school year and as otherwise necessary.

### *Goals & Objectives*

#### **By the end of the 2023-2024 school year:**

- Objective 1: [Update facilities](#) school-wide plan.
  - Identify and prioritize capital improvement projects, consistent with the overview of the facilities committee.
  - Identify associated costs, timelines, sources of funding, preferred vendors, and other relevant factors.
  
- Objective 2: Initiate and monitor an online community engagement form that will enable our broader community to provide feedback and make suggestions on possible facilities engagements.

#### **By the end of the 2025-2026 school year:**

- Objective 3: Review and revise the facilities master plan at the start of each school year and as otherwise necessary.
- Objective 4: Initiate formal planning for capital projects that may require additional support from Safety, Finance and Advancement committees.
- Objective 5: Support the Administration in the communication and further planning of capital improvements identified in previous objectives.
- Objective 6: Facilitate collaboration between committees when goals overlap (ex. Safety and Facility needs and Finance).

#### **Ongoing:**

Among other factors, apply the California Department of Education Green Ribbon Status Pillars to the facilities master list:

- Pillar I: Reduce environmental impact and costs.
- Pillar II: Improve the health and wellness of schools, students, and staff.
- Pillar III: Provide effective environmental education, which teaches many disciplines, and is especially good at effectively incorporating STEM, civic skills, and green career pathways.

# **SAFETY**

## ***Overview***

Safety & Security improvements have helped facilitate the completion of different projects through the years at St. Mary School and Parish. The school today has completed different projects, our most recent success being the TK security gate and camera.

Currently, the Safety Committee is making progress towards collaborating with the parish and submitting a Safety & Security Plan for approval to Father and the diocese. Our current efforts are focused on obtaining bids to support future Safety enhancement projects which include raised fencing, additional cameras, enhanced onsite radio dispatch, improved software and technology to support visitor and volunteer check in.

## ***Goals & Objectives***

St. Mary School strives to provide a safe, Christ-centered learning environment for students, families and employees while collaborating with the parish to maintain a welcoming environment for both school and parish.

- Objective 1: Develop a comprehensive security plan inclusive of a site plan, quotes, and approval from Pastor and Diocese by 2024.
  - Fencing/Barriers and Single Point of Entry
  - Access Controls (Doors & Gates), Controlled Vestibules
  - Security Cameras
  - Safety & Security Software
  - Signage/Badges - improved signage/badges for parent volunteer check-in
- Objective 2: Create a Joint Safety Committee between parish and school to support collaboration efforts of bringing the parish and school together by August 2023.
- Objective 3: Emergency Operation Plan (EOP) reviewed and updated annually.
- Objective 4: Develop and implement a Parent Communication Plan that includes, but not limited to, aspects of EOP, Drills, Parent responsibilities during EOP's.
- Objective 5: Continue ongoing Employee Training on safety and security protocols.
- Objective 6: Facilitate ongoing collaboration between committees when goals overlap (ex. Safety needs and Facilities or Finance).



# **ENROLLMENT**

## ***Overview***

The vision of St. Mary School is to educate the ‘whole child,’ developing students intellectually, emotionally, physically and spiritually. School programs should infuse children with well-rounded experiences and prepare them to demonstrate Catholic values in their community.

St. Mary School is in an extremely desirable physical location due to the excellent economic environment of Walnut Creek as well as the ease of access to the school from the freeway and BART. This has led to a large geographic selection of students ranging from Brentwood to Martinez to Pleasanton.

As a small school with maximum enrollment of 320, it is particularly sensitive to economic or demographic changes. Best practices show that establishing a formalized and operationalized Marketing & Advancement plan helps to sustain financial stability. This will enable the school to take a multi-year view of enrollment and not be reactive to individual year volatility. In the 2021-22 school year, the marketing committee developed and currently implements the St. Mary School Marketing plan.

## ***Goals & Objectives***

- Objective 1: Enroll the maximum number of academically and committed students each year at 320.
  - Class size goals:
    - TK - 30
    - K - 30
    - 1st - 3rd grade - 30
    - 4th - 5th grade - 34
    - 6th - 8th grade - 35
- Objective 2: Continue fine tuning the tracking mechanism for the ‘funnel’ from expressed interest, through application and enrollment. Work on being more intentional in the tracking and use, as well as tracking those that exit before graduation.
- Objective 3: By November 2023, define and create an Ambassador program and track number of contacts made to potential families. The Ambassador program serves to support prospective families as they go through the admissions process, and then transition to the Mentor family program.
  - Step 1: Set up the ambassador program that works with the Principal
  - Step 2: Implement & refine the program
- Objective 4: Continue the referral program where current families receive a tuition discount if their recommended prospective family commits to attending the school.

## MARKETING

### *Overview*

As expressed in the recently conducted surveys, the majority of families are incredibly satisfied with their St. Mary experience and believe that the school is delivering on the Mission and Philosophy. That outlook is demonstrated by high staff retention and low turnover of students/families. While there are many contributing factors to that satisfaction, ensuring the communication of success internally is important. Communication methods such as the weekly newsletter, teacher newsletters, class websites, the school website and social media (Facebook and Instagram) are critical components to marketing success.

Effective internal communication is a foundation for achieving successful external communication (or marketing of St. Mary School). The three primary stakeholders in the external messaging about the school are the students, the parents and the Faculty/Staff. It has been identified that the lack of an organized plan of how to inform parents, alumni, the parish and the larger community about St. Mary School and its achievements may leave the perception up to chance. Many aspects of this Strategic Plan will lead to increased marketing opportunities.

### *Goals & Objectives*

Develop a comprehensive marketing and communication plan that effectively portrays St. Mary School within our existing community and to prospective families.

- Objective 1: A structured marketing committee composed of parent volunteers and School Advisory Board members has started to design and build a sustainable and executable marketing plan that references communication with the Parish, enrolled families, community and alumni.
  - Sub-committees are: Brand Awareness, Enrollment Support, Advancement Support
- Objective 2: Operationalize the plan and provide a mechanism for continuous improvement.
  - On-going: Continue to analyze and modify marketing plan and approach as needed
- Objective 3: Increase community outreach events to targeted segments.
  - Alumnae
  - Community involvement
  - VIP/(Grandparent) event
  - Donor recognition
- Objective 4: Incorporate the use of analytics into the marketing plan to identify highest impact initiatives.
  - Develop marketing lifecycle
  - Understand success metrics (KPIs)
- Objective 5: Continue to hold the State of School Address on an annual basis; suggested to be in the Spring of each school year.
  - Continue to provide transparency of school including brand, enrollment and advancement

## **ADVANCEMENT**

### ***Overview***

The Advancement Committee is dedicated to the advancement and funding of the viability of the school in the long term. This committee works in tandem with the marketing and enrollment goals and focuses on funding sources across the board. The committee has been charged with identifying segments to reach out to: current families, Parish, Alumnae, sponsors, grants and more. Creating a culture of giving with the community and beyond, as well as working on long term funding sources, will provide the school with other financial resources other than traditional structures.

### ***Goals & Objectives***

Continue to grow the school's Annual Fund and ingrain it in our community's culture.

- Objective 1: Refine Annual Fund plan in an effort to improve messaging and initial touch points to the community.
- Objective 2: Increase participation from school families to 100% without regard to contribution amount.
  - Develop and implement efficient capability for tracking participation and retaining historical records.
- Objective 3: Establish metrics for tracking donations and begin collecting data for future internal use, including donor software purchase.
- Objective 4: Create a calendar of touchpoints for the full cycle of Annual Fund campaign over the course of a full school year.
- Objective 5: Create a comprehensive communications plan to support the advancement campaign.
- Objective 6: Execute the Annual Fund campaign each year according to advancement best practices and committee recommendations.
- Objective 7: Develop documents associated with the various campaign touchpoints as needed and archive as templates for use in future years.

## **FINANCES**

### ***Overview***

The Diocese of Oakland measures the strength of a school's financial position based on the percentage of the school's annual projected expenditures that are being held in reserve. The diocese considers any school with at least 50% of their projected expenditures in reserve to be in very strong financial position. St. Mary School continues to maintain close to 50% of projected expenditures in reserves. Since the launch of the Diocese Executive Financial Summary in 2011, St. Mary School has maintained its status in the top financial tier.

However, there is no guarantee that the school will remain on firm financial footing. The ability of the school to maintain/add to the reserve can turn as quickly as the economy. The school normally projects the budget to run at as close to breakeven as possible as required by the Diocese. An unforeseen facility issue, poor revenue performance of the annual fundraising auction, or the movement of a few families out of the school can cause the school to run at a deficit. The significance of which can erode the value of cash on reserves fairly quickly.

Of late, due to consistent financial strength and conservative budget forecasts the school has been able to maintain close to 50% cash reserves and increase funds to be utilized for 21<sup>st</sup> Century Learning projects. In an effort to recruit and retain quality teachers the Diocese has implemented a policy to move the salary scales toward levels appropriate and competitive with the San Jose and San Francisco Dioceses. Higher than average salary increases have been and will continue to be implemented. Higher than average tuition increases have been and may continue to be necessary in order to accommodate the salary increases.

### ***Goals & Objectives***

- There continues to be a consistent message from parents that they would like to have more transparency specific to the school finances. It is important to communicate how tuition is spent in general terms.
  - Objective 1 : Continue the State of the School presentations highlighting financial status, special funding programs and any tuition changes for the new year.
  - Objective 2: Formalize and publish a School report card from the State of the School presentation highlighting financial, academic (both achievement and curriculum highlights) and statistical information. Create a template to be updated annually.
  - Objective 3: The Board would like the Finance committee to work on creating a 3-5 year financial projected budget using different scenarios in order to plan large projects. This would be a more developed multi-year financial plan.
- Culture of Giving - Annual Fund Plan
  - Objective 4: Currently the school has a 21st century innovation fund account started. St. Mary School now has met the reserve percentage recommended by the Diocese, so any excess from reserves can continue to go to this fund. St. Mary School would like to continue to build this 21st century innovation fund for future renovations and projects in collaboration with facilities planning.



## SUMMARY

This Strategic Plan recognizes that St. Mary School is currently in a position of strength, and is designed to target efficiency and optimization, not necessarily need. The school is in sound financial shape where many improvements have been undertaken and accomplished in the past several years. The St. Mary School community should be proud of what has been accomplished.

This Strategic Plan is meant to maintain the focus on what can and should be done to continue to build the school, the community, and everything that St. Mary School has come to represent. There is always a strong financial implication tied to the goals and objectives, from running the school as well as improving the school. It is the goal of the Advisory Board that this Strategic Plan will encourage a strong understanding, acceptance, and ownership of the commitment required of the entire community to make all of this possible.

We are all *Disciples of Christ*, and here *To Shine Christ's Light*.





**ACKNOWLEDGED AND APPROVED**

  
\_\_\_\_\_  
School Principal - Mary Caren Heffner

6-15-23  
Date

  
\_\_\_\_\_  
Parish Pastor - Father Fred

6-16-23  
Date

  
\_\_\_\_\_  
Advisory Board Chair - Meredith Sousa

6-16-23  
Date

