

# **Strategic Planning Committee’s Report on Catholic Elementary Schools:**

## **Executive Summary/ Goals and Recommendations**

### **Executive Summary**

In January 2011, the Most Reverend Kevin J. Farrell, Bishop of Dallas, convened a Committee on Catholic schools, charging it to “surface and consider issues and challenges” facing Diocesan Catholic schools today, offer recommendations “to ensure the continued growth and sustainability of Catholic schools,” and “develop a comprehensive Strategic Plan on Catholic schools that will provide a blueprint for Catholic school education in the Diocese for many decades to come.” This Report represents the Committee’s response to this charge in relation to Diocesan elementary education; a subsequent report will address Diocesan high school education.

In its work, the Committee gathered extensive data and information relating to Diocesan elementary schools through site visits, data from each school and the Catholic Schools Office, surveys designed and implemented by a professional consultant, and evaluation of school facilities by a team with architectural and construction expertise. In addition, the Committee drew on reports, data, and information about Catholic education around the country.

The Report is organized into six themes. Under each theme, the Report sets out Goals, Recommendations relating to each Goal, and Rationales for the Recommendations. The themes are:

- 1. Academic Leadership**
- 2. Curriculum and Instruction**
- 3. Catholic Identity: Faith, Community, and Relationships**
- 4. School Structure, Operations, and Diocesan Support**
- 5. Governance**
- 6. Facilities**

As to academic leadership, the Report identifies several ways to improve recruitment, development, and retention of outstanding principals, assistant principals, and teachers. These include implementing and consistently following a Diocesan teacher compensation model that is appropriate and sufficiently competitive to attract and retain outstanding teachers; adding a position in the Office of Catholic Education dedicated to identifying, recruiting, developing, and placing principals, assistant principals, and teachers; and designing and implementing common, consistent, and formative annual review processes for evaluation of principals, assistant principals, and teachers.

Although the Diocesan curriculum has taken the positive step of moving to a standards-based curriculum (adapted from the Archdiocese of Hartford, Connecticut), the Report recommends that the Diocese carry out a complete assessment and subsequent redesign of curriculum, including implementation steps and a method for ongoing review of the curriculum's effectiveness. This review and redesign should take into account, among other considerations, 21<sup>st</sup> century skills and knowledge, horizontal and vertical alignment of both subject and study skills, and STEM (Science, Technology, Engineering, and Math) knowledge and skills.

The theme of instruction includes instructional practices by individual teachers as well as within the school as a whole. The Report recommends that all schools engage in ongoing review and assessment of instructional practices—drawing on assistance from the Office of Catholic Education. To carry out this mission, Catholic schools must address the diverse aptitudes and learning needs of its students, including the talented and gifted, English language learners, and those with learning differences. Further, the Diocese should evaluate existing programs and strategies relating to meeting the learning needs of children, and should develop a plan that strengthens instruction for these children.

As stated by the Vatican Congregation for Catholic Education, the fostering of Catholic identity “should be the aim of all who make up the educating community.” The Catholic community in the Diocese affirms this aim: to parents and school personnel, Catholic identity ranks among the most valued characteristics of Catholic education. And Catholic education in the Diocese of Dallas is faithful to this aim: high percentages of both parents and school personnel conclude that their schools “deliver completely” on Catholic practices and Catholic values. The Report, then, recommends that schools continue the practices by which they have so successfully fostered Catholic identity. Based on visits, surveys, and other information, the Report also recommends providing training and development for principals and clergy relating to school-parish issues and faith formation opportunities for members of the school community.

The Catholic education community, according to the Vatican Congregation for Catholic Education, should provide “the right sort of concrete support” for families facing the many challenges of our day. Thus, the Report recommends developing and strengthening programs that provide for the well being of children and families in our Catholic schools.

To enhance and sustain operational vitality for Diocesan education, the Report includes multiple recommendations relating to school structure, operations, and Diocesan support. A key

recommendation is the need to implement operational models in addition to the parish model. Additional models are necessary to provide an accessible and academically excellent Catholic education to all, including those in economically challenged urban areas as well as in growing suburban areas where many parishes lack a school or could not sustain a new school on their own. The Report recommends and gives detail about implementing additional models—specifically, what the Report calls a regional model, a family of schools model, an academy model, and a rural model. The Report also recommends increasing Diocesan-wide support of schools through a change in the assessments of all parishes and through other revenue sources.

As to Diocesan support, the Report recommends enhancing the current Catholic Schools Office, which the Report proposes be expanded and therefore renamed the Office of Catholic Education. With additional personnel and resources, the Office could provide guidance, expertise, and services to support common operational needs of schools, such as accounting, enrollment management, procurement of materials, human resources management, and technology. Further, the Office could provide educational support for its schools throughout the Diocese, for instance, in early childhood, curriculum and instruction, and religious formation for all our children.

Because the changes recommended in the Report will shift more financial responsibilities from individual schools to the Diocese, the Report recommends establishing the position of chief financial executive in the Office of Catholic Education. This person would have the direct responsibility of guiding the financial sustainability of schools and could also serve as a resource for school leaders and boards in addressing financial issues.

In the area of governance, the Report recommends that governance in each school reflect an appropriate allocation of responsibility among pastor, principal, president, and school advisory board. Specifically, the principal should exercise delegated responsibility over the educational operation of the school, and each school should have a consultative board or a board of limited jurisdiction fully constituted to perform functions of a board (such as strategic planning, marketing, advancement, facilities, finance, enrollment strategy). To this end, the Diocese should develop a pool of candidates qualified and willing to serve as school board members at Diocesan schools, depending on expertise and need at different schools. As to the Diocesan School Board, the Plan recommends that it be structured as a board of limited jurisdiction, with specific functions and responsibilities delegated to it, and possessing the necessary expertise to fulfill those functions and responsibilities.

Under the theme of facilities, the Report addresses both existing schools and schools that may be built in the future. For both existing and any future schools, the Report recommends that each school be evaluated annually, and that long-range facilities plans (for 3-5 years) be prepared and updated annually for each school. Because many school buildings across the Diocese are over 50 years old, planning must also take into account the eventual need to replace some facilities.

The Catholic population within the Diocese of Dallas has grown 38% in the past seven years. The Report recommends that planning for construction of new educational facilities in light of this growth be based on collaboration between the Diocese and representatives of individual parishes

or groups of parishes in changing urban and suburban areas. The planning should include feasibility studies taking into account demographics and demand, financial projections as to operational vitality and sustainability, and architectural planning including site identification.

The Diocese of Dallas now encompasses a region vastly changed from the Dallas in which most parish schools started. And Catholic education in Dallas faces economic and educational challenges far different from those that confronted those early, faithful pioneers of Catholic education. Yet parishioners in all 77 Diocesan parishes overwhelmingly agree that Catholic schools are vital to the future of the Church, the Catholic community, and society as a whole. The Goals and related Recommendations in the Report, the Committee hopes, respond to Bishop Farrell's charge to "provide a blueprint for Catholic school education in the Diocese for many decades to come."

# Goals and Recommendations

## ACADEMIC LEADERSHIP

**Goal 1: That every school in the Diocese of Dallas have teachers, assistant principals, and principals with the knowledge, skill, time, and support to lead the teaching and learning process.**

*Recommendation 1.1*

*Create a position in the Office of Catholic Education with the responsibility to recruit, develop, and retain outstanding academic professionals.*

*Recommendation 1.2*

*Implement a Diocesan compensation model consistent with the mission of Catholic schools and sufficiently competitive to attract and retain outstanding teachers and principals.*

**Goal 2: That every Diocesan school, and the Diocesan schools as a whole, achieve continuous improvement on the basis of rigorous and meaningful measures of evaluation.**

*Recommendation 2.1*

*Design and implement a common, consistent, and comprehensive annual review process for evaluating principals. The process should incorporate best available measures and methods relating to performance assessment and improvement.*

*Recommendation 2.2*

*Design and implement a common, consistent, and comprehensive annual review process for evaluating faculty. The process should incorporate best available measures and methods relating to performance assessment and improvement. Design of the process should draw on the expertise and input of principals and teachers.*

*Recommendation 2.3*

*Establish a Diocesan commission : 1) To evaluate the institutional effectiveness of each school with regular, systematic, and best available methods and processes; and 2) To support each school's own evaluation-related activities and data gathering. The recommended evaluation should not be limited to the assessments required for accreditation and should be used for aspects of education within all four pillars (academic excellence, Catholic identity, operational vitality, and governance). The results of evaluation should be made available and used to inform decisions and planning by individual schools and by the Diocese.*

## CURRICULUM AND INSTRUCTION

**Goal 3: That the curriculum in all schools in the Diocese of Dallas be standards-based, challenging and forward-focused in meeting 21<sup>st</sup> Century content and skills, compatible with our students' diverse learning needs, and rooted in the teachings of the Catholic faith.**

*Recommendation 3.1*

*Create a position in the Office of Catholic Education with the responsibility to oversee the design and implementation of curriculum and instruction; oversee student assessment; and serve as an expert resource for schools as to curriculum and instruction.*

*Recommendation 3.2*

*Initiate and carry out a complete assessment and subsequent redesign of curriculum for Diocesan elementary schools. The assessment and redesign process should be led by the Office of Catholic Education that would form a curriculum committee consisting of teachers across the Diocese recognized as instructional leaders and experts in their field of learning. The redesign process should set not only the curriculum but also implementation steps and an ongoing, regular process for reviewing the effectiveness of the curriculum.*

*Recommendation 3.3*

*The review and redesign process set out in Recommendation 3.2 should take into account the following: "21<sup>st</sup> century" skills and knowledge such as collaboration, critical thinking and problem-solving, communication, creativity, and information fluency; horizontal and vertical alignment of both subject and study skills that is also congruent with high school curricula; Language arts and reading curriculum that meets the needs of students with language differences; and STEM (Science, Technology, Engineering, and Math) knowledge and skills.*

*Recommendation 3.4*

*As one measure of evaluating academic achievement, ensure that standardized achievement testing is appropriately and consistently used at all schools, that test scores reflect norms or criteria which are appropriately rigorous for the mission of Catholic schools, and that test scores are reported with transparency.*

**Goal 4: That all schools in the Diocese of Dallas use instructional approaches that meet the diverse learning needs of students, engage and motivate students, develop the whole child's potential, foster a high level of achievement as measured by objective data, make effective use of technology, and foster 21<sup>st</sup> century skills.**

*Recommendation 4.1*

*Each school should initiate a course of action for reviewing, assessing, and improving instructional approaches in all disciplines and at every grade level as to the elements included in Goal 4. This process should remain collaborative and ongoing within schools. Further, this process should draw upon assistance and guidance from the Office of Catholic Education.*

*Recommendation 4.2*

*Enhance the ability of the Office of Catholic Education to provide leadership and support in specialized areas critical to instruction, including learning differences, language differences, and STEM instruction.*

*Recommendation 4.3*

*Expand the current Catholic Schools Office with a position that provides leadership and support for Early Childhood Education throughout the Diocese. Require or strongly encourage all Diocesan elementary schools to implement a pre-Kindergarten program.*

**Goal 5: That options for Catholic education in Dallas Diocesan schools will become more widely available for children with special learning needs, including children who are not able to succeed within a general education setting.**

*Recommendation 5.1*

*The Diocese of Dallas should evaluate the effectiveness of existing programs, resources, and strategies for meeting the needs of children with learning differences, and should develop a comprehensive Diocesan plan that increases and strengthens instruction for these students. This evaluation and planning process should take into account the resources and programs that public education provides for children with disabilities enrolled in religious schools.*

*Recommendation 5.2*

*The Diocese should undertake a feasibility study as to establishing educational learning centers or schools for children with diagnosed learning differences who cannot achieve success in a general education setting.*

## CATHOLIC IDENTITY: FAITH, COMMUNITY, AND RELATIONSHIPS

**Goal 6: That children who attend our Catholic schools have abundant and meaningful opportunities to develop a deep relationship with God through study, service, and spiritual practices.**

*Recommendation 6.1*

*To preserve their successful work in fostering Catholic identity, Diocesan schools should continue to reflect the important characteristics of this work: implementing the religious education curriculum and instruction of the Diocese; treating religion classes as an integral part of the academic program (including assignment of teachers and allocating an appropriate amount of class time); ensuring that faculty who teach religion meet appropriate certification requirements; using the lenses of Scripture and the Catholic intellectual tradition in an appropriate manner to help students think critically and ethically about the world; properly expressing Catholic culture and faith in the school through multiple forms of visual and performing arts, music, and architecture; and suitably including the theory and practice of the Church's social teachings in the curriculum.*

*Recommendation 6.2*

*Develop a Diocesan policy as to the level of involvement of Catholic schools in sacramental preparation.*

**Goal 7: That all constituencies in each school collaborate in fostering Catholic identity, and that faith formation and a welcoming Catholic environment be available to all members of the school community.**

*Recommendation 7.1*

*Familiarize the pastor and the principal with Catholic school-parish issues at the start of their duties.*

*Recommendation 7.2*

*Provide opportunities to seminarians, deacons, priests, and other religious for development and formation relating to the role, mission, governance, and operation of Catholic schools.*

*Recommendation 7.3*

*Enhance spiritual formation opportunities for council/board members, teachers, principals, staff, and parents.*

*Recommendation 7.4*

*Leaders and teachers in the schools should have support and formation opportunities in order to foster and sustain a school community in which all students are welcome and none are marginalized. This support and formation might take the form of in-school education as well as programs offered by the Office of Catholic Education and the Diocese.*

**Goal 8: That every school, together with the Office of Catholic Education, serve as a resource for the care and support of children, especially in times of distress.**

*Recommendation 8.1*

*Develop and strengthen programs that provide for the well being of children. A sustained educational component for parents should be included.*

## SCHOOL STRUCTURE, OPERATIONS, AND DIOCESAN SUPPORT

**Goal 9: That Catholic schools in Dallas consider alternative operational models in addition to the traditional parish school model, to the extent necessary to sustain and increase access to an academically excellent Catholic education.**

*Recommendation 9.1*

*In the organization and operation of Catholic education in Dallas, develop and make use of four new operational models in addition to the traditional parish school model. These models are: a regional school model, a family of schools model, a rural school model, and an academy model.*

*Recommendation 9.2*

*For each of the five categories of schools, establish a standard model of tuition and fees appropriate for that category based on costs, financial sustainability, support received from parishes, the Office of Catholic Education, tuition assistance, Diocesan school assessments, Diocesan capital campaign, fundraising, endowments, and annual appeals and events.*

**Goal 10: That every school in the Diocese have sufficient educational resources, human resources, and financial support to carry out the mission of providing an affordable, accessible, and excellent Catholic education.**

*Recommendation 10.1*

*Increase Diocesan-wide support of schools through change in the assessments of all parishes and through other revenue sources, and establish sufficient transparency as to how assessments are used to support schools.*

*Recommendation 10.2*

*Expand the Office of Catholic Education to include resources and professional expertise necessary to provide or support services as to common operational needs of schools.*

*Recommendation 10.3*

*Through the Office of Catholic Education or the Diocesan Business Office, provide greater centralized shared services for Diocesan schools at shared or no cost for selected schools as to functions such as accounting, advancement, communications, marketing and enrollment process management, purchasing, facilities evaluation and planning, insurance, human resources management, and technology.*

*Recommendation 10.4*

*Establish the position of chief financial executive in the Office of Catholic Education.*

*Recommendation 10.5*

*The Diocese should establish performance measures and initiate operational planning and reporting on an annual basis to provide guidance for the leadership of individual schools and for planning as to Diocesan education.*

**Goal 11: That, on an ongoing basis, education and initiatives be directed at increasing awareness and understanding of the mission and role of Catholic education, not just as to its “direct” beneficiaries but also as to the Catholic community, the wider community, and the Catholic Church in the world.**

*Recommendation 11.1*

*On an ongoing basis, the Diocese and individual schools should plan, implement, and evaluate education and initiatives aimed at increasing awareness of the critical role of Catholic schools for the Catholic community, the wider community, and the Catholic Church in the world.*

## GOVERNANCE

**Goal 12: That the Diocesan Catholic School Board will serve a strong oversight function to help assure the long-term viability of Catholic schools in the Diocese.**

### *Recommendation 12.1*

*Delegate to the Diocesan School Board specific functions and responsibilities that empower the Board to help assure the long-term viability of Catholic schools in the Diocese. The method for carrying out this recommendation is to structure the Diocesan School Board as a board of limited jurisdiction. The delegated responsibilities should include:*

*Advancing the mission of Catholic schools in the Diocese;*

- *Reviewing and adopting a strategic plan for the Catholic schools of the Diocese (the “Strategic Plan”) and monitoring the implementation and updates of the Strategic Plan and overseeing ongoing strategic planning for Catholic schools in the Diocese;*
- *Reporting periodically to the Bishop regarding progress in meeting the goals set forth in the Strategic Plan;*
- *Monitoring the existing models of governance;*
- *Recommending policy to the Bishop and Superintendent for approval, where needed;*
- *Providing strategic direction and advice concerning advancement, marketing, finance, facilities, and leadership and other corporate management matters affecting Catholic schools;*
- *Working to develop and strengthen the capacity of parish school boards; and*
- *Establishing a process for communications that enables the Diocesan School Board to interact effectively with the Diocesan schools and their respective boards.*

### *Recommendation 12.2*

*On a sustained basis, ensure that the Diocesan School Board includes members who reflect the diversity of the Catholic community, are dedicated to Catholic school education both across the Diocese and nationally, and who possess the necessary expertise to fulfill the functions of the Diocesan School Board.*

**Goal 13: That each Catholic school implements appropriate governance through a fully constituted and effective school board, pastor (in the case of the parish school model), and principal.**

### *Recommendation 13.1*

*Ensure that governance in each school reflects appropriate allocation of responsibility and authority among pastor, principal, president, and school board. The principal should receive and exercise delegated responsibility over the educational operation of the school, and each school should have a school board fully constituted to perform functions of the board, including strategic planning, marketing, advancement, facilities, finance, enrollment strategy, communications, and other areas of corporate management.*

Additional detail on Recommendation 13.1:

- *Under Church Law, the pastor has leadership over the pastoral care of the parish. Part of this role includes being the administrator of the ecclesial goods of the parish. In administering these goods, the pastor must follow Canon Law as well as any Diocesan legislation. Consistent with Church Law, the school leader (principal) can be delegated the responsibility of administering the education program, such as employment and supervision of staff, curriculum planning, and other matters.*
- *The school board members could be appointed by the pastor, appointed by the principal, or chosen by some other appropriate manner of selection. The members of the school board need not all be members of the parish (but should be reflective of the community). As a group, the members should have the background and expertise necessary to perform the functions of a school board. They should include representatives of the local parish, as well as educational, philanthropic, business, and community leaders knowledgeable in a wide range of fields.*
- *The school board should serve the following functions through committee work: strategic planning; development; finance; enrollment strategy; and communications plan.*
- *The Committee believes that a board of limited jurisdiction is a more effective structure than an advisory board or advisory council. Yet, for reasons set out in the Rationales, the Recommendation does not specify that current school advisory councils all be converted immediately to boards of limited jurisdiction.*
- *This Recommendation also applies to any schools that take the form of a regional school, family of schools, or academy. For these schools, the preferable structure is a board of limited jurisdiction.*

*Recommendation 13.2*

*The Diocese should develop a school board program to support and provide ongoing professional development for new and existing school boards.*

*Recommendation 13.3*

*The Diocese should develop a pool of candidates qualified and willing to serve as school board members at Diocesan schools depending on expertise and need at different schools.*

*Recommendation 13.4*

*Each school should have a succession and transition plan for the position of president, principal and other critical positions in educational and operational leadership. The school board, drawing on input or templates suggested by the Diocese, should provide leadership in this area.*

## FACILITIES

**Goal 14: That educational facilities in all schools meet the needs for education, administration, safe environment, and technology; are up to date in learning environment attributes; and meet current environmental-green building expectations.**

*Recommendation 14.1*

*Facilities in each school should be evaluated annually, and long- range facilities plans (for 3-5 years) should be prepared and updated annually for each school. To assist in evaluation and planning by each school, the Diocese should establish standard evaluative categories for various educational facilities (such as administration space, auditorium-assembly space, basic classrooms, cafeteria, etc.). Evaluative categories would relate to characteristics necessary for that type of area (for instance, safe disposal in labs) as well as to characteristics such as space, ventilation, light, ADA compliance, etc.*

*Recommendation 14.2*

*The annual facilities review process should include technology and technology infrastructure for education, administration, and safe environment.*

*Recommendation 14.3*

*Each school that is on parish property should have an acceptable-use agreement with the parish specifying the key details relating to the mutual use of the school facilities by the school and the parish.*

**Goal 15: That facilities in Diocesan schools be continuously improved through a collaborative process led by the Office of Catholic Education and include participation by school facilities managers, maintenance supervisors, and specialists.**

*Recommendation 15.1*

*Create a system for collaboration with existing and future elementary schools with regard to facilities, including educational environment, technology infrastructure, purchase of services and materials, and maintenance and repair issues.*

**Goal 16: That long-range planning take place relating to replacement of existing facilities (given the aging of schools) as well as the development of new schools to serve our expanding Catholic population.**

*Recommendation 16.1*

*Engage in long-range planning for the replacement of existing facilities.*

*Recommendation 16.2*

*Develop long-range plans for developing new schools to serve our expanding Catholic population.*