

Summary of the 2016 SMCS State of Our Schools
“Accomplishments and Future Focus”
February 29, 2016



The evening opened with a welcome and opening prayer by Mike Zuleger, principal of St. Mary Catholic Middle School. Mrs. Helen Englebert, president of St. Mary Catholic Schools, then shared about the school system’s accomplishments over the last year.

NEW MIDDLE SCHOOL

Enrollment in this beautiful new facility is climbing. This year, we started with 7 more students than we had at the old building, and registrations for next year already exceed this year’s enrollment by 16 students!

We are witnessing **pride and excitement** among students; diocesan leaders find it an inviting, inspiring environment and want to hold meetings here; operational efficiencies are many and the only significant challenge is that it is expensive to run. We are grateful for the amazing community support in raising \$11 million, and are pleased to say that the building is paid for!

NAME CHANGE

In conjunction with the construction of our new middle school, our **school system changed its name** from Twin City Catholic Educational System (TCCES) to St. Mary Catholic Schools (SMCS). The primary reasons for this switch were to maintain the history and identity associated with more than eighty years of elementary-through-high school Catholic education in Neenah-Menasha; to promote identity as a school system, rather than individual schools; to nurture a commitment to a complete Catholic education from preschool through high school; to more fully expresses Catholic identity; and to reflect the growth in enrollment among students from communities in addition to Neenah and Menasha.

PERSONNEL CHANGES

Although our teacher turnover was low this year, we did have some **significant changes in personnel** in other key areas. Mike Zuleger started as the principal of the middle school; we have a shared principal model at St. Margaret Mary Elementary w/Eleanor Healy and Tina Fairweather; Christina Turner is the part-time director of fine arts and Hayden Kraus is the part-time technical director; Liz Uhlenbrauck is the new director of admissions; and Jennifer Miller is now focusing on her role in human resources.

PUPIL SERVICES

We initiated a **donor-supported, comprehensive program** to serve students from preschool through twelfth grade, allowing for a successful transition of services from one school level to the next. The program involves eight teachers including guidance counselors, learning specialists, a learning consultant and a reading specialist. We have supplied PRIMs (Pre-Referral Intervention Manuals) for each pupil services teacher and each school. This program will strengthen our ability to help every student succeed to his or her highest potential.

EARLY CHILDHOOD PROGRAM

This year, Neenah initiated a free **4K program**. Our two Neenah elementary campuses were offered the chance to be sites for the program, but upon evaluation of the anticipated impact, potential revenue, liabilities and risks, we opted to not accept the bid. When the program started in Neenah, we anticipated an approximately 50% reduction in enrollment, but we have attained higher numbers than expected. We are also finding that those that do enroll tend to continue with the system.

Our teachers are working together to **strengthen our early childhood program** with common curriculum and shared resources. An early childhood coordinator is facilitating the conversations.

FINE ARTS

Under the leadership of our **new FA personnel** with the support of our principals, we have achieved the following: We are using facilities well for both system and outside events; all of the lights in theater were recently replaced; in the classrooms, we have put teachers in spots where they and their students can thrive; we have added a part-time vocal instructor, as well as a new graphic arts class and drama class; and, we have a marching band!

At the high school we have seen good growth in band and art classes, while we continue to experience some challenges with voice. Ukuleles were purchased for the elementary school third grades. We sent three art teachers to WI Art Conference last spring and 15 students had artwork shown at the Bergstrom Mahler Museum; 9 pieces were selected and are currently on display at the state capitol. We are also implementing creative ways to generate more excitement for productions.

CONFUCIUS CLASSROOM GLOBAL CONFERENCE

By special invitation, SMCS President Helen Englebert and Molly Griffin, director of the SMCHS Confucius Classroom, attended the 10th annual global Confucius Institute conference in Shanghai, China. During this all-expenses-paid trip to Shanghai and Wuhan City, they traveled to Wuhan City to visit the partner university for UW-Platteville and to tour two schools. The relationships formed and information gathered will help to strengthen our Mandarin language and culture program, as well as world languages at SMCS in general.

TECHNOLOGY

Last year, a **four-year technology plan** was developed, approved by the BOT and implemented. It will be reviewed and revised as needed each year. A generous gift of \$250,000 increased technology inventory from 800 units to 1300 units, including new middle school one-to-one program, laptops to replace teachers' seven-year old equipment, laptops for students to use at every elementary school, smart boards and projectors. We have held staff development workshops to bring teachers up to speed on software and internet-based programs, and have added a technology proficiency requirement in teachers' job description for all educators.

An **account recognition system** for food service has been fully implemented, achieving the goals of getting children through the line more quickly and improving accuracy in billing.

COMMUNICATIONS

Our **new website** was launched in August. It is a great tool and we are committed to keeping the site current and informative. We moved from an annual report to a donor report (with limited news) supplemented by two newsletters each year that will be primarily online with a small quantity of printed

versions for special events. This creates significant cost savings and gives us the ability to have much more current information in our publications.

We are **growing our use of technology** to get our message out. We are approaching 940 followers on Facebook with new friends every week, and are using electronic newsletters, monthly email newsletter for alumni. We developed a standard communications process to publicize all SMCS events--- fundraisers, school & system events. In 2015, we sent out 81 press releases, generating 70 some stories.

COMMUNITY ENGAGEMENT & ANNUAL FUND

The SMCS Annual Fund provides funding to offset expenses without having to significantly increase tuition. This year's goal is to raise \$200,000 by June 30, and we are currently at \$131,227. Everyone's help is needed to help reach that goal. If every family gave just a bit, to help cover the true cost of education, that would have a great impact.

In comparison to where we were a year ago, 200 **alumni** have donated to the annual fund, compared to 149 at this point last year. They have given more than \$80,000, exceeding last year's benchmark by more than \$16,000. In comparison to where we were a year ago, 521 gifts have been received from **non-alumnus donors**, compared to 274 last year. In addition, we have increased the number of gifts from recurring payroll deduction. **Faculty and staff** gifts to the annual fund to date are more than \$2000 from 26 people.

Among the **scholarship initiatives** were new projects with the Boys & Girls Club and Valley Kids. For the former, we worked with donors to secure funding for a scholarship to benefit a middle school student from the BGC and partnered with the organization to create process for student applications based on financial need and a leadership/values essay. One has been awarded the scholarship for three years! We also partnered with Valley Kids to create a scholarship program for middle school students' tuition needs.

The advancement department **partners with our parishes** to strengthen the bond between school and church. They hold periodic meeting with pastors to identify opportunities (e.g., involve SMCS students in church, use school students in parish music ministry, etc.)

We held three community presentations with our **ON TRACK community resource education series**. All sessions are presented by experts in their fields, are held in the FAEC Black Box Theater and are free to the community.

ENROLLMENT

This year's official enrollment of 914 (recorded on September 18, 2015) was composed of 126 in early childhood, 372 in elementary schools (K-5), 162 at SMCMS and 254 (includes 12 STS and 3 Global Outreach students) at SMCHS.

Based on current **registrations for 2016-17**, our numbers indicate 93% retention from 5th to 6th grade, 82% retention from 8th to 9th grade and 74% retention from PK to kindergarten.

Our system **enrollment continues to hold steady** in a time when it is documented that parochial school enrollment is dropping across the nation and locally. Our goal is to grow enrollment at all five schools.

BUSINESS/FINANCES

Our goals are to spend wisely, invest smartly in valuable services and programs and control costs.

The **average cost to educate a child** this year \$9,775, according to the formula established by the state of Wisconsin. Approximately 54% of our families receive some form of reduced tuition, and 35% receive tuition grants.

We used to talk about three revenue sources: tuition, parish subsidy and third-source resources. The picture has evolved into something more complex however, so our pie chart now includes more “pieces” (see Addendum A). **Sources include:** tuition; co-curricular fees; WPCP; international students; Scrip; parish subsidy; third-source funds (Zephyrfest, Jumbo Gumbo, Annual Fund, \$88,000 in grants for various projects); scholarships, grants and endowments; and bequests/restricted gifts.

Last year, parents used **Scrip** to pay \$165,900 toward their tuition bills! Participating parishes earned over \$40,000 by direct sales of Scrip and sharing in administrative portion of the parent sales. The **international student program** earned \$120,000 for the 2014-15 fiscal year and the presence of these 12 in our high school builds multicultural understanding. See below for information about Wisconsin Parental Choice Program (WPCP).

A balance sheet summary of the 2014-15 fiscal year is attached (Addendum B), which is a snapshot of our assets and liabilities. We are working hard to provide more detailed financial reports through Great Plains software, which gives us greater capabilities.

We continue to rely on the **line of credit** to support our cash flow needs. We have not increased the amount, and our goal is to decrease it; we meet the requirements of the bank to reduce it to “zero” each year. We must remember to consider net liabilities, not just what is on the line of credit. The board and administration are committed to working on reducing the reliance on this business tool (for example, this year \$250,000 of an undesignated bequest went to offset the line of credit).

Good news includes that we have **no loans on the two new buildings**, are working toward a balanced budget this year with money allocated to debt reduction and have experienced no increase in insurance costs.

Following Mrs. Englebert’s overview of the year, SMCS Board of Trustees President Pam Seidl talked about the board and the system’s new strategic plan (the board notes follow and strategic plan details provided elsewhere in the corporate board meeting binder).

BOARD OF TRUSTEES

Mrs. Seidl stated that the board of trustees has **17 members**, plus the system president, who is an ex-officio (non-voting) member. The group consists of four pastoral leaders (one from each of the Neenah/Menasha parishes with one representing St. Mary/St. John) and thirteen volunteers. The volunteers each serve a three-year term, and may serve a maximum of two terms.

The board is always looking for **people who want to serve our system at a higher, strategic level**. Candidates can be alumni, benefactors, community leaders, business people, lawyers, religious or educational professionals who work outside the system.

The **role of the board of trustees** is to develop strategy and policy for St. Mary Catholic Schools in the areas of Catholic identity, planning, policy making, hiring and evaluating the president, finance and budgeting, and public relations and development.

STRATEGIC PLAN

The strategic planning committee met several times from September – November 2015. The group was composed of the members of the board of trustees, the system president, principals and administrative leadership.

The **strategic vision for the future** that was developed states: SMCS is acknowledged for its academic excellence and delivery of an exceptional student experience. The system is financially stable (as defined by decreased line of credit, increased revenue, balanced budget) to ensure the long-term feasibility and continuation of SMCS Catholic education.

The strategic initiatives that we will focus on are to:

- Advance Catholic education as an investment in developing future Catholics through academic and spiritual leadership
- Develop and implement recruitment and retention strategies that grow enrollment
- Establish a financially stable business model
- Deliver academic excellence
- Provide an exceptional student experience.

(See Addendum C for a fuller explanation of the plan)

Following Mrs. Seidl's presentation, the principals each shared an update regarding a particular area.

WISCONSIN PARENTAL CHOICE PROGRAM

Mr. Pat Batey, principal of St. Mary Catholic High School, stated the **two primary benefits** of the program are 1. providing full tuition assistance to many for whom a Catholic school would otherwise be unattainable, and 2. allowing us to extend our own tuition assistance grant monies to more families. For the school system, the program helps broaden the socio-economic culture of our schools and financially enables us to make strategic decisions to provide services that we otherwise may have not have been able to afford.

Once a student qualifies and is accepted into the program, tuition payments continue to be made yearly for that student until he or she graduates or leaves the system. Last year (in the first year of the program) SMCS enrolled 28 students as part of WPCP, and we received \$204,450.

For the current school year, we have Parental Choice **students enrolled at every grade level in our K-12 classes**, and the state is paying \$7200 for K-8 and \$7800 for 9-12 for each student voucher. This year 139 students qualified and 100 received vouchers for SMCS, so we can anticipate how that total income is growing this year due to the greater number of students enrolled.

State testing is mandated for WPCP students, including the ACT for 11th graders, the ACT Aspire test for all WPCP students in grades 9 and 10, and the Wisconsin Forward Exam for WPCS students in grades 3 - 8. Recently, SMCHS administered the ACT to our WPCP students and to approximately 35 non-voucher students.

Compliance with the WI Parental Choice Program's many requirements is time consuming and challenging, yet it has created efficiencies and improvements in our fiscal management. And although the income is significant, there are costs as well, including expensive and demanding audits, absorption of the costs usually paid by families (e.g. laptop fees, field trip and retreat costs, curricular fees for fine arts classes, etc.)

As with any new program, SMCS continues to strive to incorporate the Wisconsin Parental Choice Program into our system culture. We are proud of what we have to offer and are happy to make our programs more available to those who would otherwise settle for a free public education.

CO-CURRICULAR AND ENRICHMENT ACTIVITIES

Mr. Mike Zuleger, principal of St. Mary Catholic Middle School stated that our elementary schools offer basketball, volleyball, soccer and football, and our **elementary enrichment program** offers a variety of after-school opportunities such as karate, dance, chess, golf, yoga, and tennis. In the summer we also offer STEM-(science, technology, engineering, and mathematics) based classes and camps such as Club invention. In the elementary and middle schools we have a successful FIRST Lego League **robotics program**, and this year was the first time we expanded our VEX robotics program to eighth graders. That team even won the Judges Award at one high school tournament! Also this year, we remodeled the robotics building to create more space to prepare for competitions, including more room for this 8th grade team.

Our **high school VEX robotics teams** continue to be a strength of SMCHS. Last year we had award-winning representations and state, national, and world competitions and are on track to do the same again this year. In fact, for the third year in a row we had a team win the state competition, and four teams have qualified for nationals, and two for the world championship this year.

At the **middle school** we've had successful seasons in cross country, volleyball, football and basketball. In basketball we had the longest winning streak in recent memory with a 19 home-game winning streak between all our grades! Our students continue to be successful in a variety of math competitions, and they did a wonderful job performing Bye Bye Birdie for their musical this year. This year we will offer an intramural track program at the middle school, where the students will practice with the high school. Then in 2017, we are planning to start a track team at the middle school. Also, the SMCS Booster Club now serves the middle school and high school.

The middle school's **double gymnasium** offers space for multiple practices or competitions to occur on campus at the same time.

At the **high school** level, our student athletes have been much more competitive in the new Big East conference. In the conference tournaments, the girls volleyball team took 4th, girls basketball took 5th, boys basketball took 3rd and girls tennis team won their conference tournament. Our powerlifting co-op team also fared well, with several lifter going to the state tournament soon. All other sports teams were competitive and had successful seasons.

We have a few **varsity coaching changes** for the upcoming year. Jeff Brightwell resigned as the head football coach, and Ryan Pues will take over beginning with the 2016 season. Coach Gary Krueger resigned from the boys soccer team, but will continue to coach the girls. We are searching for his replacement.

Overall, we feel all our co-curricular activities are headed in the right direction.

PROFESSIONAL DEVELOPMENT

Jeanine Leege, principal of St. Gabriel Elementary and our director of curriculum stated that SMCS has **professional development in-service days** scheduled throughout the year to focus on faith and academics. Each year, we focus on one of the six components of Foundational Catechetical Certification required by the Diocese of Green Bay; this year's topic is morality. In addition to five classes throughout the year, outside reading and reflections are required.

Other **professional development experiences with outside resources** this year have included creating an exceptional customer experience and thinking outside the box with Steve Tyink of Miron Construction and focusing on student success through differentiated instruction with Shirley Paulson. The principals also attended an instructional coaching seminar at Marian College with Jim Knight. We also facilitated breakout workshops for all SMCS faculty featuring Google Docs, Notebook software for SMART Boards, ADD/ADHD, classroom management strategies, faith integration, Blooms Taxonomy, brain breaks and Daily 5.

Teachers and principals continue to work on the Effectiveness Project and the My Learning Plan software to strengthen teacher effectiveness and increase student achievement. Part of this project includes formalized Student Learning Objectives that facilitates data driven decision making.

ACADEMICS

Jill Ahles, principal of St. Mary Elementary School, stated that our dedicated faculty and administrators are **committed to meeting the academic needs of every student** across the educational spectrum. SMCS's accelerated opportunities, solid college-prep course selections and high expectations motivate and challenge students, and learning specialists provide support where needed.

We recently **expanded our world languages program** to include Mandarin Chinese instruction for our students in grades 3-5, in addition to Spanish. Those teachers also spend time with the younger students to expose them to interesting aspects of Chinese and Spanish/Hispanic culture (e.g., students enjoyed special Day of the Dead celebrations and performances and classes connected to a three-day artist in residence visit from a Chinese musician). When students reach middle school, they can choose between Chinese, Spanish and German and can complete the equivalent of a first-year high school level class.

This semester, we added two **new classes** at the high school: graphic design and drama. And, we will continue to offer the opportunity for middle school students to walk over to the high school campus for classes.

Several factors point to academic excellence: We consistently score above national averages in standardized tests such as MAP (Measures of Academic Progress) and the ACT. In 2015, our **ACT composite average** (23.4) was in the top four among Fox Cities schools. In September, we learned that 19 of our students earned **AP Scholar Awards**, and we had the **highest percentage of seniors** in the Fox Cities achieve this honor. We also learned that one SMCHS student had earned the designation of **National Merit Scholar** Finalist, and one was a commended scholar. We have had at least one National Merit Scholar every year for the past eight years.

FAITH INTEGRATION AND SERVICE

Tina Fairweather, assistant principal at St. Margaret Mary Elementary, stated that faith is the **primary reason for the existence of our schools**. The diocese has identified eight components that should be readily found in a Catholic School. They are environment, community, prayer, spirituality, social justice, morality, mission, and witness. All teachers are responsible for shaping the faith and value systems of the young people in their classes. We do not just put students “in touch” with Jesus, but also in communion and intimacy with Him. Teachers share faith through their experiences, hearts and spirits. We need to share that our faith is rooted in relationships--between teachers and students, with families--relationships that are built with God.

Mrs. Fairweather spoke about how each lesson planned by a teacher can be related to Christian faith and values. Lessons prepared for school subjects can point to the successes and failures of living according to God’s plan. SMCS strives to ensure that all students are affirmed and treated with respect on the playground, the ball field, dance class, etc., as well as in the classroom.

She enumerated examples of **how faith can be shared in the classroom** in the areas of art and music (discussion, making religious symbols or art); science (studying God’s creation, observing the integral balance of nature, discussing current issues in the light of faith); language arts (books with a message, seeking examples of Christian virtues reported in the media, reading the bible); social studies (discussing Christian responses to war and natural disaster, studying parallels in church and world history, exploring diversity, equality, etc.); physical education (instill an appreciation of our bodies and good health, fair play) and math (symmetry of nature in geometry, value of stewardship in learning budgeting).

Mrs. Fairweather stated that at SMCS, we **don’t focus on service projects, but on service activities**—a way of life through which we learn “How can I help?” or “Where can I serve?” Examples of service activities at the high school from this year included the high school assisting shelter and food pantries and raising money and awareness for a charitable organization through a creative door decorating contest in cooperation with the SPIRITUS group. At the middle school, a Voyager Group was established for students interested in learning more about their faith and praying for special intentions, special collections occur for Double Portion Food Program and Habitat for Humanity. The elementary schools work with the parishes and/or each other on various collections, such as the Soup-er Bowl for St. Joseph Food Pantry, some pray for individual families each week, and some visit local charitable organizations to see how they accomplish their mission (e.g. the St. Vincent DePaul Store).

Following the principals’ presentations, Mrs. Englebert shared some information about what’s coming up for St. Mary Catholic Schools.

In addition to what Pam shared about the strategic plan, SMCS is looking forward to the following: **Summer opportunities** will include the restructured summer day camp (only for enrolled students); for-credit classes at the high school (health, photography, coding and personal finance) and a rocketry class. SMCS will also continue to offer sports and enrichment camps, and will host a Green Bay Packers football camp.

With regard to the **grounds and facilities**, we are expanding our kitchen gardens that are managed by food service. A new plot has been tilled on the middle school grounds and is ready for student volunteers to plant, tend and harvest the veggies that will be used in our student lunch programs.

We are working on plans for a **digital marquee** for the front of the middle/high school campus, and have secured a gift to pay for it.

We are very excited about our **Zephyr Fields of Dreams** project that will include regrading the retention pond to convert it into a suitable practice field for softball and soccer, creating a softball field that will be ready for competition in 2017, and exploring the idea of putting up a building for storage and a team gathering space.

A **building and grounds committee** has been launched as part of the board of trustees, and recently had their first meeting. They are tasked with doing an assessment of our buildings and developing a plan for the property owned by the system.

In academics, we are in the process of **evaluating education programming that can strengthen our schools**. We have begun preliminary research on literacy programs and have investigated promising STEM-based curriculum. The principals are excited about these potentials, and are currently exploring how to best implement STEM education in our schools.

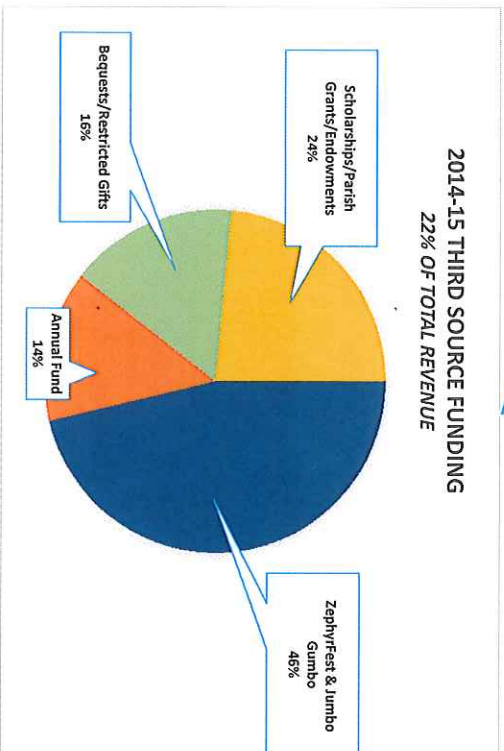
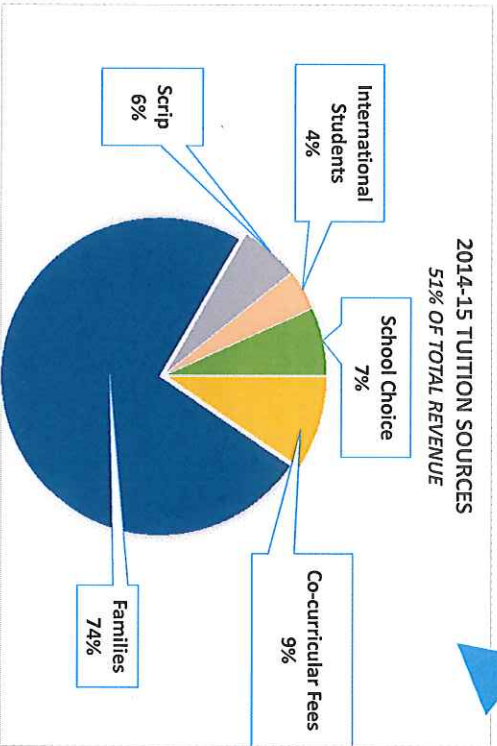
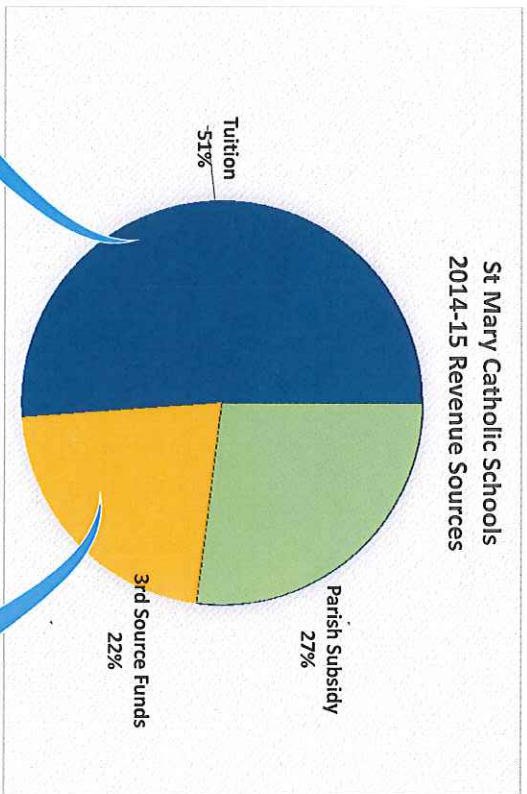
In the financial realm, we have received notification that we will receive an **estate gift** of about \$560,000. Approximately one half is designated for endowed tuition assistance, and about a half will be directed to operations. Of that latter portion, \$100,000 is being invested in **endowed accounts** to fund four areas of interest. Each has a different principle amount, but 5% of each one's total will be distributed each year, to be spent on unfunded special projects. The new funds have been dubbed FATE (Fine Arts, Athletics, Technology and Emerging Educators). These account will provide funding for vulnerable areas!

Finally, we are preparing a **balanced budget** using real numbers, while also addressing reduction of our debt. Our long-term strategic plan will help us to plan for debt reduction and wise stewardship as we move forward.



St. Mary Catholic Schools

Grades P3-12



ST. MARY CATHOLIC SCHOOLS, INC
STATEMENT OF FINANCIAL POSITION
June 30, 2015

ASSETS

CURRENT ASSETS

| | |
|--|------------------|
| Cash and cash equivalents | \$ 144,111 |
| Receivables | |
| Laptop program receivables | 39,411 |
| Tuition receivable, net of allowance for doubtful accounts of \$10,000 | 87,088 |
| Other receivables | 113,630 |
| Pledges, current portion | 1,531,702 |
| Inventory - scrip | 87,844 |
| Total current assets | <u>2,003,786</u> |

INVESTMENTS AND LONG-TERM RECEIVABLES

| | |
|--|------------------|
| Investments | 1,523,795 |
| Beneficial interests in perpetual trusts | 1,591,011 |
| Pledges receivable, less current portion above | <u>2,852,702</u> |
| Total investments and long-term receivables | <u>5,967,508</u> |

PROPERTY AND EQUIPMENT

| | |
|-------------------------------|--------------------|
| Land | 326,789 |
| Land improvements | 268,300 |
| Buildings | 20,560,376 |
| Equipment and furniture | 613,397 |
| Total, at cost | <u>21,768,862</u> |
| Less accumulated depreciation | <u>(3,064,259)</u> |
| Total property and equipment | <u>18,704,603</u> |

TOTAL ASSETS

\$ 26,675,897

LIABILITIES AND NET ASSETS

CURRENT LIABILITIES

| | |
|-------------------------------------|----------------|
| Accounts payable | \$ 144,698 |
| Lines of credit | |
| Middle School | 5,552,542 |
| Operating | 622,714 |
| Current maturities of notes payable | 23,737 |
| Agency fund liability | 119,546 |
| Accrued salaries and benefits | 376,982 |
| Unearned tuition, fees and income | <u>141,893</u> |
| Total current liabilities | 6,982,112 |

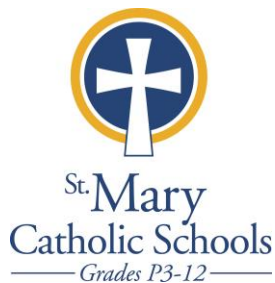
LONG-TERM LIABILITIES

| | |
|--|------------------|
| Notes payable, less current maturities above | <u>39,735</u> |
| Total liabilities | <u>7,021,847</u> |

NET ASSETS

| | |
|---|-------------------|
| Operating - undesignated | (281,247) |
| Property and equipment, net of related debt | 13,152,061 |
| Board-designated | <u>668,835</u> |
| Total unrestricted | 13,539,649 |
| Temporarily restricted | <u>6,114,401</u> |
| Total net assets | <u>19,654,050</u> |

TOTAL LIABILITIES AND NET ASSETS \$ 26,675,897



**SMCS Strategic Plan
2016-17 thru 2018-19 school year
Approved by SMCS Board of Trustees
1-20-16**

Vision/Goal:

SMCS is acknowledged for its academic excellence and delivery of an exceptional student experience. The system is financially stable (as defined by decreased LOC, increased revenue, balanced budget) to ensure the long-term feasibility and continuation of SMCS Catholic education.

| Strategic Initiative | Ownership* |
|---|---|
| <p>Advance Catholic education as an investment in developing future Catholics through academic and spiritual leadership. Grow overall brand awareness in the community and focus on enhancing Parish/School relationships, existence of the system as an option to other parochial schools and key points of difference.</p> | <p>BOT Champion: Jeff Berg Task Force: Molly Griffin, Mary Lou Kalas Stakeholder Groups: SMCS Advancement Staff; BOT Marketing Committee; Parish leaders/members</p> |
| <p>Develop and implement recruitment and retention strategies that grow enrollment. Grow recruitment of new families in the system at all grade levels. Increase overall retention rates focusing on transition grades. Improve community perceptions and foster partnerships</p> | <p>BOT Champion: Pam Seidl Task Force: Liz Uhlenbrauck, Michelle Meyer, Jyll Scanlon, Heather Voss, Shelly Wautlet, Katie Weber, Pam Pingel Stakeholder Groups: SMCS Recruitment Staff; Co-Curricular staff, Parents & Students from all grade levels</p> |
| <p>Establish a financially stable business model. Create plan that decreases our line of credit, continues to deliver a balanced budget and increases third source fundraising while continuing to invest in academic initiatives which will set us apart in the marketplace and improve academic excellence. Implement cost management plan that includes collaboration, increased efficiencies (staffing and facilities) and assessment of future needs.</p> | <p>BOT Champion: Dan Engelhard Task Force: Chris Hartrich, Nancy Braatz, Helen Englebert Stakeholder Groups: SMCS Advancement Staff, Pastors, Parish Financial Leaders</p> |
| <p>Deliver academic excellence Develop plan to ensure academic needs are met (and exceeded), education models are reviewed and considered, and professional development is encouraged and planned for... all in order to deliver a quality Catholic education in the most successful and efficient manner.</p> | <p>BOT Champion: Kathleen Healy Task Force: SMCS Academic Leadership, Helen Englebert Stakeholders: Teachers, parents, students from all schools/grade levels</p> |
| <p>Deliver an exceptional student experience that fosters an environment where students are engaged beyond the classroom to create lifelong affinity for the schools.</p> | <p>BOT Champion: Sue Pawlowski/Stew Koskinen Task Force: Ann Rasmussen, students, teachers Stakeholders: Teachers, students from all schools/grade levels</p> |

***Ownership Definitions**

BOT Champion – responsible for organizing and driving task Forces to develop plans to accomplish strategic initiative, meeting deadlines set by the BOT, and providing progress updates to the BOT

Task Force – core work group responsible for researching and recommending plan to BOT to accomplish strategic initiative.

Stakeholders – those who are invested in the strategic initiative, have current knowledge of the strategic area, and who will be impacted by the strategic plan outcomes. Representatives from these groups should be included on task forces and/or in the gathering of data and development of plans to accomplish the strategic initiative.

Next Steps:

1. Task Forces formed – February 2016
2. Task Forces meet and identify metrics and outline plan of action and report to BOT – April 2016
3. Periodic reports to BOT from each area on an on-going basis