

# BLUE RIBBON COMMITTEE ON CATHOLIC SCHOOLS

A STRATEGIC PLAN  
FOR CATHOLIC SCHOOLS IN  
THE ARCHDIOCESE OF BALTIMORE



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BLUE RIBBON COMMITTEE ON CATHOLIC SCHOOLS

June 10, 2010

Most Reverend Edwin F. O'Brien  
Archbishop of Baltimore  
320 Cathedral Street  
Baltimore, MD 21201

Dear Archbishop O'Brien,

Thank you for the opportunity to serve our Church, our Catholic schools and the students—current and future—privileged to receive a Catholic education in the Archdiocese of Baltimore.

On behalf of the 17 members of the Blue Ribbon Committee on Catholic Schools, I am pleased to present the attached Strategic Plan to you today.

After more than a year of study and deliberation, the Committee is proud of the work that culminated with the creation of this plan, which, when implemented, we believe will secure the long-range future of our Catholic school system.

We learned a great deal during our deliberations. Our schools provide an outstanding product to our students. Our faculty and staff passionately, and at considerable financial sacrifice, deliver on our Vision “to nurture and sustain the God-given gifts that each of our children possess.” Our schools and our graduates have a large and positive impact on our regional economy and on the communities where we operate our schools.

We also learned that many of our schools will continue to face significant financial shortfalls if enrollment declines continue. Our governance structures are flawed and our current stewardship practices are confusing and in some cases inefficient.

Our Catholic identity, which we believe is our schools' most powerful competitive advantage, needs to be re-emphasized and marketed aggressively. Our fine academic curriculum, while sufficient in meeting the needs of the majority of our students, needs to be enhanced by more differentiated offerings in some of our schools to provide additional options for parents and their children.

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We address all of these issues and more in our recommendations that are categorized under four headings: Catholic Identity, Academic Excellence, Governance and Stewardship.

We received critical feedback from all of our stakeholders through various means, including a public comment period and listening sessions. It is clear that many parents who currently do not have their children in our schools want to have their children in our schools; they simply cannot afford it!

As our plan points out, it is vital that tuition assistance be significantly increased by way of expanded and comprehensive parish support, significant endowment for tuition assistance via a capital campaign, and through increased State support for our schools.

Archbishop O'Brien, I would like to thank the Blue Ribbon Committee members for their exceptional commitment to this effort. Their contributions have been immeasurable.

I would also like to recognize and thank Monsignor Robert Hartnett and his staff for their outstanding work and support of our committee. Finally, I would like to thank Monsignor Richard Bozzelli for brilliantly facilitating our many sessions. Our discussions were open, candid, intense and, most importantly, productive.

On behalf of my fellow members of the Blue Ribbon Committee, I offer our gratitude to you for your leadership and support throughout the last year-and-a-half, and for taking on the daunting challenge of making "Catholic education as affordable and accessible to as many Catholic youngsters as possible as well as to non-Catholics in some of our more impoverished communities." We believe our plan answers this call.

Sincerely,

A handwritten signature in black ink that reads "Frank P. Bramble, Sr." The signature is written in a cursive style with a large initial 'F' and 'B'.

Frank P. Bramble, Sr.  
Chairman  
Blue Ribbon Committee on Catholic Schools

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# Contents

## **Executive Summary**

### **Overview**

- State of the Archdiocese's Catholic Schools in 2009
- Members of the Blue Ribbon Committee on Catholic Schools
- Archbishop O'Brien's Charge to the Blue Ribbon Committee
- Internal & External Research & Analysis
- Stakeholder Participation
- Coordination with the Consolidation of Schools
- New Superintendent

## **Strategic Plan for Catholic Schools in the Archdiocese of Baltimore**

### **Introduction**

### **Vision and Mission Statements**

### **Catholic Identity**

- Introduction
- Catholic Identity Indicators
- Spiritual Life of the School
- Formation and Professional Development
- Principal and Teacher Prerequisites
- Curriculum
- Student Assessment
- Parent Faith Development
- Sacramental Preparation

### **Academic Excellence**

- Introduction
- Student Performance and Assessment
- Accreditation and School Recognition
- Certification
- Professional Development
- New Teacher Recruitment
- Curriculum and Instruction

- Educational Programs and Excellence
- Technology

### **Governance**

- Introduction
- Archdiocesan Catholic School Board
- Archdiocesan Collaborative Schools
- Principal Selection for Schools Using Parish and Interparish Models
- Principal Leadership Institute
- President/Principal Professional Growth and Evaluation Process
- School Boards
- Priest and Seminarian Formation about Schools

### **Stewardship**

- Introduction
- Catholic School Vitality, Viability and Planning
- Parish Support
- Finances
- Tuition
- Government Funding
- Advancement
- Marketing and Public Relations
- Human Resources
- Facilities
- Technology
- Transportation

## **Appendix A – Schools in the Archdiocese of Baltimore**

## **Appendix B – Consultations**

## **Appendix C – Archdiocesan Catholic School Board**

## **Appendix D – Archdiocesan Collaborative School Model**

## **Bibliography**

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# Executive Summary

In February 2009, Archbishop Edwin F. O'Brien empanelled a Blue Ribbon Committee on Catholic Schools (the Committee) to develop a Strategic Plan for Catholic Schools in the Archdiocese of Baltimore. The decision to create the Committee arose as a result of growing concerns about a widening affordability gap caused by sharp declines in enrollment, and increased financial challenges, as well as an overall need for a long range plan that assures a strong Catholic school system. A plan to reverse the decline and, in later years, help enrollment to grow once again, was needed.

The 17-member Committee included leaders from the fields of education, philanthropy and business. Over the course of a 16-month period the Committee researched, analyzed and created a Strategic Plan that contains 56 recommendations. The Archbishop established the following as a goal for the Strategic Plan for Catholic Schools:

*To make Catholic education as affordable and accessible to as many Catholic youngsters as possible as well as to non-Catholics in some of our more impoverished communities.*

To prepare for development of its plan, the Committee, working with the Office of Schools Planning, conducted a 360-degree evaluation of the Archdiocese's Catholic schools. Viability assessments were conducted for every school and demographic and financial trend analyses were performed. Best practices for Catholic school sustainability were researched and extensive analysis of governance models was conducted. Listening sessions, focus groups, and a six-month public comment period gathered feedback from parents, school presidents and principals, teachers, priests, donors, and others interested in Catholic school education.

The Committee also created new Vision and Mission Statements for the Archdiocese's Catholic school system that build on the goal and principles outlined by the Archbishop. The Committee's Vision Statement emphasizes the Mission of Jesus above all else and states:

*Catholic schools in the Archdiocese of Baltimore nurture and sustain the God-given gifts of every person, especially students, to be used in service to the Mission of Jesus.*

The Mission Statement focuses on the education of the whole student and insists upon collaboration to assure a sustainable school system. The new Mission Statement reads:

*Catholic schools in the Archdiocese of Baltimore provide a Christ-centered education that is academically excellent and empowers students to reach their full potential – spiritually, intellectually, physically, socially, and morally. Fostered through robust collaboration among all stakeholders, the mission is accomplished through accountable leadership at all levels, ongoing and coordinated strategic planning, centralized efficiencies, and financial sustainability.*



Queen Sweeney III, The Catholic Review

Throughout its planning process, the Blue Ribbon Committee acknowledged that comprehensive financial support throughout the Archdiocese for Catholic schools will be needed to increase tuition assistance, which, in turn, will help grow student enrollment. Needed capital improvements and operational support will also require expanded advancement efforts, including a capital campaign.

In its Strategic Plan deliberations, the Committee also returned again and again to certain themes. Assuring that our schools have the best leadership in place was identified as a critical element. Likewise, accountability across the board – for heads of school, teachers, school boards and the Superintendent – was a consistent objective in the plan’s recommendations.

The Committee also found that the need for more centralization was



Owen Steerley, III, The Catholic Review

a prevalent theme. The Committee acknowledges that while many public school systems are moving toward greater decentralization, the Archdiocesan school system’s significant lack of centralization in the past has been detrimental to the system’s organization and potentially resulted in foregone cost savings. Creating

standards for operation, and thus, accountability and consistency, whether they are for education (e.g. through grade level objectives) or management (e.g. the standardization of fiscal practices or tuition policy), was also a common premise of many of the recommendations.

The Strategic Plan contains four major sections on: Catholic Identity, Academic Excellence, Governance, and Stewardship. There are 10 **Catholic Identity** recommendations, including how a school’s Catholic identity is assessed, and how the spiritual life of the school is fostered. The Catholic formation and professional development of heads of school and school boards is also addressed and the Committee outlines the prerequisites for teachers of the Catholic faith, as well as affirms the implementation of a new religion curriculum. Moreover, opportunities for parents to enhance their own faith development, the need for improved parent education about sacramental preparation, and the importance of fostering greater family connection with the local parish, are also discussed in the Committee’s recommendations.

The **Academic Excellence** section of the Strategic Plan contains 19 recommendations: student performance and assessment; accreditation and school recognition; certification; professional development; new teacher recruitment; curriculum and instruction; educational programs; and technology (curriculum). Under this plan, the Superintendent of

Schools is charged with the accountability for student performance and the development of a comprehensive school curriculum is recommended. The Committee also recognizes that implementation by the Department of Catholic Schools of the new accreditation program with the Southern Association of Colleges and Schools will be crucial.

The Strategic Plan’s section on **Governance** focuses on the leaders of our Catholic school system and the structure within which they operate. The Committee believes that the leadership of presidents and principals is critical in ensuring the future success of Catholic schools in the Archdiocese. The two centerpiece recommendations in the Governance section call for the creation of an Archdiocesan Catholic School Board and the development of a new, innovative governance model for elementary schools in the Archdiocese. The Archdiocesan Collaborative School (ACS) model is a hybrid structure that is recommended by the Committee as the preferred model of governance for elementary schools. It combines the benefits of centralized governance (including heads of schools reporting to the Superintendent) with the benefits of local community involvement and a sense of ownership and decision-making at the local level.

Other recommendations in the Governance section also address school leadership, including the creation of a Principal Leadership Institute, in conjunction with local Catholic colleges and universities, as well as the creation of a new President/Principal Professional Growth evaluation process. Strategic planning by local school boards and priest and seminarian formation regarding schools are also the subject of recommendations in the Governance section.

The fourth section of the Strategic Plan addresses **Stewardship** or those functions that support the operation and management of a school system and individual schools. Two critical recommendations in this section address: the establishment of benchmarks to measure and oversee Catholic school vitality and viability; and support for the Archbishop’s call for all parishes to financially support Catholic schools. The other 17 recommendations in the Stewardship section address: finances; tuition; government funding; advancement; marketing and public relations; human resources; facilities; technology (services); and transportation.

Finally, upon acceptance by the Archbishop of the Strategic Plan, a detailed Implementation Plan, including responsible parties, cost estimates, and a timeline for execution of the recommendations will be required.



# Overview

The Blue Ribbon Committee on Catholic Schools presents this report and Strategic Plan for Catholic Schools to Archbishop O'Brien for his adoption and implementation. The result of 16 months of research, analysis, and discussion, the Strategic Plan contains 56 recommendations, as well as Vision and Mission Statements for Catholic schools. The Committee has requested and received assurance that once the plan is approved by the Archbishop, he will charge the Office of Schools Planning, in consultation with the Department of Schools, with creating an Implementation Plan.

Before turning to the details of the Strategic Plan, it is helpful to understand its context – by examining both the state of Catholic schools in the Archdiocese of Baltimore at the time of this plan's development and the overarching principles, set out by the Archbishop, which provided critical direction and formed the foundation of the plan.

## State of the Archdiocese's Catholic Schools in 2009

The steady decline of student enrollment in Catholic schools, from 37,259 students in the 2001/2002 school year to 31,276 students in 2009/2010 school year, was a clear indicator of a system that was faltering. School closures paralleled the enrollment declines. Including the 13 schools consolidated as of June 30, 2010, 31 schools in the Archdiocese have closed since 2002; three Catholic schools have opened or been approved in that same time period. See Appendix A for a list of current and recently closed schools.

The recent economic downturn only served to heighten the problem, with declines in annual enrollment doubling from an average loss of 600 students to more than 1,200 in each of the past two school years. In that same period, the Archdiocese has provided nearly \$10 million in scholarship aid and other direct financial assistance to students and schools to fill the financial gap. Despite these contributions, increased costs of operations, including securing and retaining high quality teachers and support staff, further strained school viability.

School deficits and poor cash positions throughout the school year

resulted in some schools being unable to pay debts, leaving the Archdiocese as the payor of last resort. As of December 2009, Catholic schools owed the Archdiocese \$11.7 million for unpaid insurance, pension contributions, payroll advances and other subsidies, and were on track to add an additional \$2.2 million to that debt for the current (2010) fiscal year. In addition, schools across the Archdiocese are expected to have cumulative budget deficits, totaling \$7.4 million for the current fiscal year.

Underscoring the inefficient operation of Catholic schools in the Archdiocese is the fact that 10,000 of the 32,500 total seats in Archdiocesan Catholic schools (in the 2009/2010 school year) were unoccupied. The aging infrastructure of school buildings and lack of attention to maintenance further compounds the fiscal challenges, as approximately \$26 million of deferred maintenance required attention.

These grim statistics explain in part the crisis the Archdiocese found itself facing in February 2009 when the Blue Ribbon Committee was created by the Archbishop. These statistics, however, don't tell the whole story. Beyond enrollment declines and budget deficits, the Archbishop also realized that other factors affecting Catholic school education needed attention in order to strengthen the school system as a whole. The last time the schools in the Archdiocese, and their management and operation, had been examined thoroughly by an outside group, was 1989.<sup>1</sup>

## Members of the Blue Ribbon Committee on Catholic Schools

In light of the challenges facing the Archdiocese's schools, Archbishop O'Brien called for a broad, top-to-bottom review of every aspect of Catholic school education, management and operation. Recognizing that he wanted a comprehensive analysis and a strategic plan developed by those with a fresh perspective, the Archbishop decided to reach outside Central Services to gather some of the best minds in the field of education along with some of the most ardent supporters of Catholic school education.

The Archdiocese of Baltimore was not alone in facing declining enrollment and financial difficulties as dioceses across the country, particularly those with large urban populations, experienced similar challenges. Assembling a group of experts to address diocesan educational needs was a key recommendation of the U.S. Conference of Catholic Bishops (USCCB). In its report, *Renewing Our Commitment to Catholic Elementary and Secondary Schools in the Third Millennium*, the USCCB called upon the Bishops to convene educational, business, and community leaders:

...to address the critical issues of Catholic identity, cultural diversity, finances, just wages and benefits, academic quality – especially in the area of religious education – alternative governance models, and the marketing of our Catholic schools.<sup>2</sup>

To lead this effort, the Archbishop tapped Mr. Frank P. Bramble, Sr., a Director of Bank of America Corporation and former Chief Executive Officer of MNC Financial Inc. and former Executive Officer, MBNA Corporation, as well as a Catholic school graduate. At the Archbishop's request, Mr. Bramble agreed to chair the Committee and, in consultation with the Archbishop and the Archdiocese's Vicar General, Monsignor Richard Woy, began the process of selecting its members. They sought members who brought a diverse perspective to education, an analytical acumen for business and philanthropy, and knowledge of Catholic schools at the grass roots level.

**Mr. Frank Bramble, Chair**  
Director  
Bank of America Corporation

**Dr. Andrés A. Alonso**  
Chief Executive Officer  
Baltimore City Public School System

**Ms. Maureen Creel**  
Teacher  
St. John the Evangelist School,  
Severna Park

**Mr. James C. Davis**  
Chairman  
Allegis Group

**Dr. Nancy Grasmick**  
State Superintendent of Schools  
Maryland State Department of Education

**Dr. Joe A. Hairston**  
Superintendent  
Baltimore County Public Schools

**Msgr. Robert L. Hartnett**  
Pastor  
Our Lady of Mount Carmel  
Catholic Church

**Mr. Owen Knott**  
Chief Operating Officer  
Knott Mechanical

**Fr. Michael T. Martin OFM Conv.**  
President  
Archbishop Curley High School

**Reverend Joseph L. Muth, Jr.**  
Pastor  
St. Matthew Catholic Church

**Ms. Pamela L. Sanders**  
Principal  
St. Ambrose School

**Dr. Mary Pat Seurkamp**  
President  
College of Notre Dame of Maryland

**Mr. James R. Stojak**  
Independent Consultant  
Citicorp (Retired)

**Mr. Casper Taylor, Jr.**  
Government Relations Consultant  
Alexander & Cleaver

**Sr. Helen Wiegmann, S.S.J.**  
Former Elementary School Principal

**Mr. Thomas E. Wilcox**  
President and CEO  
Baltimore Community Foundation

**Rabbi Lawrence Ziffer**  
Executive Vice President/Director  
Center for Jewish Education

## Seven Guiding Principles

Archbishop O'Brien enumerated seven guiding principles to direct the work of the Blue Ribbon Committee; these included:

- 1) *Catholic schools must continue.*  
While nearly every possible scenario is on the table, one scenario is not. And that is a future that does not include Catholic schools. I am wholeheartedly committed to the ideals on which our Catholic educational system was founded – namely, that our schools serve as vehicles in which we pass down the faith to our children and through which we provide the truth and hope found in Jesus to all children who seek it.
- 2) *A plan for a school system is needed.*  
The system of schools that was initially created by immigrants and for immigrant Catholic students and gradually became fragmented and disconnected with the departure of religious communities and the movement of Catholics out of the city, must emerge from this effort a school system.
- 3) *All parishes must support Catholic schools.*  
All of our parishes – including those with no attachment to a school – must be active supporters of Catholic schools. Education, especially of our youngsters, has long been central to the Church's mission of evangelization, and thus it is the responsibility of all Catholic parishes to support the teaching mission of the Church.
- 4) *Children of all backgrounds and traditions are welcome in Catholic schools.*  
While this in-depth study will focus on our Catholic schools, we realize that Catholic education is not limited solely to those children enrolled in them. Our next effort will be to focus on religious education students to whom we are obliged to pass along the fullness of our Catholic faith. Further, our history of educating both non-Catholic children, as well as those children who can ill-afford a Catholic education but are no less deserving of one, must continue if we are to remain a Church committed to its charitable and civic responsibilities.
- 5) *We must broaden the financial support for Catholic schools.*  
We must make it a priority to broaden the base of financial support for students in our Catholic schools—including the entire Catholic community, philanthropic organizations, and government entities. Schools that rely solely on tuition to subsist cannot continue. The vicious cycle of declining enrollment followed by higher tuitions is financially over-burdening parents and leading our system into a downward spiral careening out of control. If we cannot find other ways of financially supporting our schools, nothing else we discuss today will matter.
- 6) *Our schools must continue to be academically excellent, values-based and safe.*  
Consistent with maintaining a strong Christ-centered identity, our schools must uphold a commitment to provide children and youth an affordable, values-based, academically excellent education in a safe environment, and rooted in the sacred traditions of our faith. Graduates of our Catholic schools will be able to take their rightful place in a democratic society and work to incorporate Christ's teachings into the very fabric of community life.
- 7) *The Strategic Plan is a parallel process to the school consolidations.*  
The focus of this committee is to plan over the next 18 months for the long-term sustainability of Catholic education. Meanwhile, we will continue to meet our ongoing responsibility of addressing the real and serious enrollment and financial challenges that pose an immediate threat to some of our schools. The severity of these challenges will most likely compel us to act during the time that the Committee is developing this long-range plan.

In the end, a Catholic school teacher, three Catholic school heads (two current and one former), a college president, three superintendents of public school systems, the leader of a Jewish educational services organization, two pastors who serve on school boards, and members of the philanthropy and business communities, were chosen to make up the talented, diverse and committed 17-member Blue Ribbon Committee.

Concurrently, the Archbishop created the Office of Schools Planning within the Archdiocese to provide staff support for the Blue Ribbon Committee and to address the more immediate challenges facing Catholic schools. The Office of Schools Planning's Executive Director, Msgr. Robert Hartnett, also served as a member of the Committee. Providing important and time-consuming assistance to the Committee was Msgr. Richard Bozzelli, who facilitated the many meetings of the Committee and guided its discussion.

The Archbishop, in charging the Blue Ribbon Committee with developing a comprehensive Strategic Plan for Catholic schools, set the following overarching goal for the Plan:

To make Catholic education as affordable and accessible to as many Catholic youngsters as possible as well as to non-Catholics in some of our more impoverished communities.

The Archbishop also enumerated seven principles to guide the work of the Blue Ribbon Committee, seeking through these principles to establish key parameters for a Catholic school system. Most notably, the Archbishop articulated that abandoning the Church's mission of Catholic school education was not an option. Rather, he said, a school system that continues to provide an academically excellent, values-based, safe education, and is financially sustainable is a critical outcome.

In his guiding principles, Archbishop O'Brien also established the bold but necessary requirement that all parishes in the Archdiocese of Baltimore support Catholic school education. This declaration, while seemingly a new message in 2010 in the Archdiocese of Baltimore, has the strong support of bishops nationally.<sup>3</sup> The U.S. Conference of Catholic Bishops has written:

The burden of supporting our Catholic schools can no longer be placed exclusively on the individual parishes that have schools and on parents who pay tuition. This will require all Catholics, including those in parishes without schools, to focus on the spirituality of stewardship. The future of Catholic school education depends on the entire Catholic community embracing wholeheartedly the concept of stewardship of time, talent, and treasure, and translating stewardship into concrete action.<sup>4</sup>

With this goal and seven principles guiding them, the Archbishop asked the Committee to submit its plan to him within 18 months.

<sup>3</sup>While this concept may sound new to some parishioners in 2010, this concept was embraced philosophically by Archbishop William D. Borders in his report, *Catholic Schools at a Turning Point: A Time for Decision*, in 1986.

<sup>4</sup>USCCB, *Renewing Our Commitment*, 11.

The Committee realized from the outset that its approach to strategic plan development required an in-depth analysis of research and data that were both internal and external to the Archdiocese. To determine its data needs and for subsequent review of information, the Committee formed two work groups related to sources of data and research collected. In addition, after the research and analysis phase was completed, the two work groups continued to meet and prepared draft recommendations for consideration by the full Blue Ribbon Committee.

### ***Internal Analysis Work Group***

An Internal Analysis Work Group met 10 times between June 2009 and January 2010 to review extensive data associated with our current schools and to develop recommendations for proposal to the full Blue Ribbon Committee. The Internal Analysis Work Group consisted of the following Blue Ribbon Committee members:

- Sr. Helen Wiegmann, S.S.J., former principal of Our Lady of Grace School, Chair of the BRC Internal Analysis Work Group;
- Maureen Creel, Teacher at St. John the Evangelist School (Severna Park);
- Fr. Joe Muth, Pastor, St. Matthew parish and Pastor, Blessed Sacrament, Board Member, Cardinal Shehan School; and
- Pamela Sanders, Principal, St. Ambrose School.

The research and analysis of internal data consisted primarily of two components:

- Analysis of Viability Assessments for all schools (with non-private status) in the Archdiocese (see description below); and
- Review of other data concerning many aspects of school curriculum, instruction, management and operation.

### ***School Viability Assessment***

The Viability Assessment process contains three key parts: school self-assessment, team assessment, and post-assessment review and planning.

Each school, with feedback from its key stakeholders, conducted a self-assessment utilizing a tool entitled *Viability Profile*, which examined 10 key factors of Catholic school viability. These factors include:

- Catholic identity
- Development and planning
- Diversity
- Educational programs
- Facilities
- Family involvement
- Finances
- Governance
- Leadership
- Technology

In concert with the school's self-assessments, visiting teams, consisting of three to five individuals, including representatives from the Department of Catholic Education Ministries, Catholic school principals and other educators, conducted an external evaluation of the school utilizing a standard protocol. Visits consisted of school tours, classroom observations, formal and informal conversations with school staff, and meetings with representatives of the major stakeholders. After each visit, the visiting team prepared a comprehensive school report.

Next, a post-visit consultation with the school's administration and, where appropriate, with the Pastor and/or School Board Chair was held to provide an in-depth report of the team's findings, measured side-by-side with the school's self assessment. This level of transparency was critical for both sharing insights and allowing the school to address areas where they disagreed with the team's findings. School administrations were then charged with creating a plan for improvement utilizing recommendations from the Viability Assessment reports.

### ***External Analysis Work Group***

The External Analysis Work Group met five times between September and December 2009 to review and analyze external data and information and consider recommendations for proposal to the full Blue Ribbon Committee. The External Analysis Work Group consisted of three Blue Ribbon Committee members and three individuals not on the Committee:

- Fr. Michael Martin, OFM Conv., President, Archbishop Curley High School and member of the Blue Ribbon Committee, Chair of the BRC External Analysis Work Group;
- Owen Knott, Chief Operating Officer, Knott Mechanical, and member

- of the Blue Ribbon Committee;
- Dr. Mary Pat Seurkamp, President, College of Notre Dame, and member of the Blue Ribbon Committee;
- Lawrence Callahan, Founder and Partner, Education Strategies, Inc.;
- Genevieve Delcher, Principal, St. John School (Hydes, MD); and
- Barry Fitzpatrick, Principal, Mount St. Joseph High School.

The analysis of external data and information concerning Catholic schools in the Archdiocese centered on:

- Factors and influences in the regions where Archdiocese of Baltimore schools are located, including competitor school information; and
- Information, policies and strategic plans from other dioceses across the country that could be helpful in the Committee's analysis and evaluation of policies, programs and other factors affecting schools in the Archdiocese of Baltimore.

To complement the extensive individual school-level analysis, the External Work Group examined factors and trends germane to a school's immediate catchment area, i.e. demographic trends and information on competing schools. Additionally, the team conducted reviews of policies and strategic plans from other dioceses across the country that would inform the Blue Ribbon Committee's Strategic Plan. The types of information and research analyzed by the External Analysis Work Group are detailed in the accompanying sidebar.

Throughout the 16-month span of the Blue Ribbon Committee's work, there were several opportunities for Catholic school stakeholders to participate in the process of the plan's formation.

*Listening Sessions:* Ten Listening sessions were held throughout the Archdiocese between September 29 and October 21, 2009. Catholic school parents, teachers, staff, parishioners, and all those having an interest in the future of Catholic education in the Archdiocese were invited and encouraged to participate. Attendance for the 10 sessions totaled 634. Participants were updated on the planning process and then asked to hold discussions in small groups and report their ideas about Catholic schools, particularly concerning the areas of Catholic Identity, Academic Excellence, Governance, and Stewardship. Each session ended with an opportunity for additional commentary in an open microphone format.

*Public Comments:* A six-month public comment period (from May 15, 2009 – November 15, 2009) invited all interested parties to submit written comments for consideration by the Blue Ribbon Committee on Catholic Schools and the Office of Schools Planning. Comments could be filed online at a dedicated page on the Archdiocese's web site, by e-mail or through U.S. Mail.

## Research & Analysis

- Current Demographics and Future Trends of School Age Children in the Areas Served by the Archdiocese of Baltimore (examined macro public school enrollment trends, actual and projected for 2007-2017).
- Enrollment Projections (through 2017) for All Public Schools within a Four-Mile Radius of Every Catholic School in the Archdiocese of Baltimore.
- National Trends in Catholic School Closures, Mergers, and Openings.
- Middle School Migration: Changes in Students between 5th and 6th Grades and the Impact on Traditional K-8 Catholic Schools.
- Standardized Testing in the Archdiocese of Baltimore and Test Comparisons with Competitor Populations.
- Assessment of Catholic Religious Education (ACRE) Test Scores: Archdiocesan v. National Averages.
- Assessment of Catholic Religious Education (ACRE) Test Scores: By School
- The Effectiveness of Catholic Schools.
- Academic Challenges of Children in Our Markets.
- Pre-Kindergarten Programs: Comparison of State and Archdiocese of Baltimore Programs
- Cost per Student: Comparison of State Public School Data and Cost and Tuition Data for Schools in the Archdiocese of Baltimore.
- Student/Teacher Ratio: Comparison of Public Schools with Archdiocese of Baltimore Student/Teacher Ratio.
- Average Class Size: Archdiocese of Baltimore
- Distance Traveled to School by Archdiocese of Baltimore Students
- Students Who Did Not Return (08/09 school year; by grade)
- Homeschooling Projections and Experience: Nationally and Locally.
- Religious Education Program Enrollment of K-8 Students in Archdiocese of Baltimore (by parish)
- Teacher Salaries: Comparison of Public Schools (by County) with Archdiocese of Baltimore
- Teacher Salaries: Comparison of Other Dioceses with Archdiocese of Baltimore.
- Teacher & Principal Certifications in the Archdiocese of Baltimore—both Maryland State Department of Education and Archdiocese of Baltimore Catechetical Certification.
- Strategic Planning in Other Dioceses: Analyzing 265 Factors Affecting Catholic Identity, Governance, Academics, and Stewardship in Nine Dioceses.
- Other Dioceses' Comparisons of Parishes/Catholic Population/Number of Catholic Schools
- Diocesan School Mission Statements
- Facilities Management: Outsourcing by Other Dioceses
- School Surveys by Archdiocese of Baltimore
  - Parent Satisfaction Survey (Spring 2006)
  - Student Satisfaction Survey (Winter 2007)
  - 2002-2006 Exit Survey (Fall 2006)
  - Exit Survey (2006-2007) (Fall 2007)
  - Parents of Young Children (2007)
  - School Planning Survey of School & Parish Leaders (2009)

The public was notified about this opportunity through an alert on the home page of the Archdiocesan website, an article in *The Catholic Review*, and flyers were sent home with school students in both May and September. In addition, persons who attended the Listening Sessions and Archbishop's Consultations were given contact information for filing comments. A total of 620 comments were received. In addition to expressing both positive and negative opinions, there were many recommendations included in the comments.

*Focus Group Research:* Through a third party, the Archdiocese conducted a focus group study to understand the attitudes and beliefs of Catholic school parents, religious education parents, and prospective parents. A total of eight sessions were held, with two groups each in Baltimore City, Anne Arundel County, Baltimore County, and Frederick County. Key findings from this report will also assist the Archdiocese in developing a branding and marketing campaign for Catholic schools and in helping individual schools market their schools to prospective families.

*Consultations:* Consultations with school presidents, principals, priests, and pastoral life directors were held twice during the planning year. In February 2009, at the beginning of the planning process, these groups were consulted to help shape the scope of the planning process, specifically identifying areas that should not be overlooked by the Blue Ribbon Committee and others. In October 2009, these individuals met again and held discussions in small groups and developed specific recommendations for Catholic schools, focusing on the areas of Catholic Identity, Governance, Academic Excellence and Stewardship.

In addition, the Archbishop met with his two bodies of priest-advisors, the Priest Consultors and the Presbyteral Council, several times during the planning year. These priests were consulted on issues ranging from school governance and finances to strategic planning. Both groups of advisors held a special meeting on Catholic school planning to provide feedback directly to the Archbishop. The Archbishop also held many individual meetings over the past year to learn the views of organizations and individuals.

*Committee Meetings and Presentations:* To accomplish its work, the Committee maintained a busy meeting schedule; the full Committee met 19

times between March 2009 and June 2010.

Over the course of its deliberations, the Blue Ribbon Committee invited several individuals to make presentations at Committee meetings. The Committee heard from:

- Dr. Ronald J. Valenti, Superintendent of Catholic Schools, Archdiocese of Baltimore
- Mrs. Karen Murphy, Principal, Resurrection/St. Paul School, on behalf of the Elementary School Principals Association
- Ms. Fran Critzman, on behalf of the Archdiocesan Board of Advisors to the Superintendent
- Dr. Diane Barr, Chancellor, Archdiocese of Baltimore

Other staff members from various departments within Central Services also attended meetings as needed. Appendix B lists other persons who were consulted by members of the Committee and/or the Office of Schools Planning during the course of the Committee's research and deliberations.

Because the Blue Ribbon Committee's strategic planning process was not intended to address the urgent enrollment and financial challenges currently faced by some schools, the Archbishop recognized that he would be compelled to act sooner to consolidate schools while also enhancing programming. The Archbishop instructed the Office of Schools Planning to conduct an exhaustive assessment of every school in the Archdiocese and develop school consolidation recommendations while also identifying programmatic enhancements.

In March 2010, the Archbishop approved a 32-page Consolidation Plan and Report, entitled *Preserving the Tradition, Transforming the Future: The Rebirth of Catholic Schools in the Archdiocese of Baltimore*. The Office of Schools Planning led that parallel effort and much of the same research and analysis on Catholic schools supported both the Blue Ribbon Committee's Strategic Plan work and the Office of Schools Planning's work on school consolidations. The Blue Ribbon Committee, while not involved in the preparation of the Consolidation Plan, did review the plan and found it consistent with the direction it was taking in developing the Strategic Plan.

The Consolidation Plan and Report detailed the consolidation of 13 schools in the Archdiocese, effective June 30, 2010, and also introduced several new academic programs. At the time of the Consolidation

Plan & Report, the Blue Ribbon Committee also previewed seven key recommendations on: tuition assistance; creation of a principals leadership institute; a collaborative project with religious communities on Catholic identity; a new governance model – the Archdiocesan Collaborative School model; the creation of an Archdiocesan Catholic School Board; support for the BOAST legislation to support nonpublic schools; and parish support for Catholic schools. A copy of the Consolidation Plan and Report can be found at: [www.archbalt.org/aplacetogrow](http://www.archbalt.org/aplacetogrow).

In November 2009, Dr. Ronald J. Valenti, Superintendent of Schools, announced that he would be retiring at the end of the current school year (June 30, 2010), after nearly 20 years in the Division of Catholic Schools. The Archbishop thanked Dr. Valenti for his many years of dedicated service to the students, principals, teachers and staff in the Archdiocese's Catholic schools and expressed his gratitude for Dr. Valenti's unwavering dedication to the academic, faith-filled excellence of our schools.

A Superintendent Search Committee, led by Dr. Mary Pat Seurkamp, President of College of Notre Dame of Maryland and member of the Blue Ribbon Committee, was appointed by the Archbishop and is expected to make a recommendation for a candidate for Superintendent to the Archbishop. Implementation of this Strategic Plan over the coming years primarily will rest with the new Superintendent and the Department of Catholic Schools, with strong oversight from the Archdiocesan Catholic School Board.<sup>5</sup>



<sup>5</sup>The Archbishop recently divided the Department of Catholic Education Ministries into two new Departments: the Department of Catholic Schools and the Department of Evangelization. Thus, effective July 1, 2010, the Superintendent of Schools will head the new Department of Catholic Schools.

# Strategic Plan for Catholic Schools *in the Archdiocese of Baltimore*

## **Introduction**

In its Strategic Plan deliberations, the Blue Ribbon Committee returned again and again to certain themes. Assuring that our schools have the best leadership in place was identified as a critical element and led to the creation of a governance model that places that responsibility, the selection of heads of school, with the Superintendent. Likewise, accountability for all stakeholders – including heads of school, teachers, school boards and the Superintendent – was a consistent objective in the plan’s recommendations.

The Committee also found the need for more centralization to be a consistent area of focus. The Committee acknowledges that while many public school systems are moving toward greater decentralization, the Archdiocesan school system’s significant lack of centralization in the past has been detrimental to the system’s organization and potentially resulted in missed opportunities for cost efficiencies. In addition to cutting costs, centralization of some services – such as accounting, tuition collection, advancement, marketing and technology – could reduce burdens at the local level and allow administrators more time to devote to education.

Closely related to the theme of centralization is standardization. Standards for operation, and accountability to such standards, create performance expectations and consistency in a school system. Standardization was a common premise in the areas of academics (e.g. through grade level objectives) and stewardship (e.g. through the standardization of fiscal practices in tuition policy).

Putting in place benchmarks and accountability measures and creating permanent funding mechanisms, such as a well-funded endowment and strong marketing of our schools to attract and retain students, will assure a healthy future for Catholic schools in the Archdiocese of Baltimore.

The Committee also discussed the importance of implementation of the Strategic Plan and recognized that development of a thorough

Implementation Plan is crucial. The Committee has requested and received assurance that once the plan is approved by the Archbishop, he will charge the Office of Schools Planning, in consultation with the Department of Catholic Schools, with creating an implementation plan.

The Implementation Plan should be prepared in collaboration with the new Superintendent and other affected departments of the Archdiocese’s Central Services. For each recommendation contained in this Strategic Plan, the Implementation Plan should detail the parties responsible for implementation, the affected parties, the estimated costs of implementing the recommendation, and a detailed timeline, set out by quarter, for implementation. It is recommended that such a plan be developed by November 1, 2010. It is expected that first steps toward implementation of some of the recommendations will occur concurrently with the development of the Implementation Plan.

In implementing both this Strategic Plan and the Consolidation Plan approved by the Archbishop in March 2010, the Committee believes that it is imperative that there be full collaboration between the Department of Catholic Schools and other Central Services departments that provide critical functions in support of school viability, including: Fiscal Services, Development, Communications, Human Resources, Facilities Management, Information Technology, Child and Youth Protection, and other Catholic education ministries. Reconfiguring personnel assignments within the Department of Catholic Schools to reflect the goals of this strategic plan and assure mission accountability must be an important priority for the new Superintendent of Schools.



# Vision and Mission Statements

As part of its comprehensive examination of the Archdiocese's school system, the Blue Ribbon Committee also recommends that new Vision and Mission statements be adopted, to reflect the tenor and aims of the school system envisioned through the implementation of the Strategic Plan. The Committee recommends the following to the Archbishop for adoption and display in all Catholic schools in the Archdiocese.


## VISION STATEMENT

Catholic schools in the Archdiocese of Baltimore nurture and sustain the God-given gifts of every person, especially students, to be used in service to the Mission of Jesus.

## MISSION STATEMENT

Catholic schools in the Archdiocese of Baltimore provide a Christ-centered education that is academically excellent and empowers students to reach their full potential – spiritually, intellectually, physically, socially, and morally. Fostered through robust collaboration among all stakeholders, the mission is accomplished through accountable leadership at all levels, ongoing and coordinated strategic planning, centralized efficiencies, and financial sustainability.

### **Key Recommendations**

In each section of the Strategic Plan, the Committee has chosen to emphasize what it considers key recommendations for Catholic schools and the Catholic school system in the Archdiocese of Baltimore. These key recommendations are noted by the following icon: 

# Catholic Identity



*The Catholic school affords a particularly favorable setting for catechesis with its daily opportunity:*

- ~ for proclaiming and living the Gospel Message;*
- ~ for learning and appreciating the teachings of our Church;*
- ~ for acquiring a deep understanding, reverence, and love of the Liturgy;*
- ~ for building community;*
- ~ for prayer;*
- ~ for proper formation of conscience;*
- ~ for the development of virtue; and*
- ~ for participating in Christian service.<sup>6</sup>*

## Introduction

Catholic identity is the defining characteristic of the Archdiocese of Baltimore's school system. It clearly is what separates its schools from public schools, private schools and other religious-based educational institutions. The Archdiocese of Baltimore has a prominent place in the history of Catholic school education in the United States, as pioneers Elizabeth Ann Seton and Mary Elizabeth Lange laid the foundation for the Catholic school system with the opening of their schools in Baltimore City in the early part of the 19th century. As the most important distinguishing characteristic of the Archdiocese's school system, Catholic identity received intense review from the Blue Ribbon Committee.

Catholic identity is expressed in a school in many ways – through its religion curriculum and instruction, but even more so by its practices – prayer, worship and liturgy – and through students' relationships with and service to others. These actions and daily witness, as well as academic religious instruction, all pass on the Catholic faith to children and young people and help assure the Catholic Church of the future.<sup>7</sup>

In some schools in the Archdiocese, particularly in Baltimore City, the majority of the students are of other faiths. This raises the question – why does the Archdiocese continue to operate some schools that are filled predominantly with students of other faiths and where does Catholic identity fit in that particular enrollment model? The adage, “we educate these

<sup>6</sup>United States Conference of Catholic Bishops, *National Directory for Catechesis*, Washington, D.C.: 2005, 233.

<sup>7</sup>Catholic schooling was one differentiating factor in a major study of Catholic beliefs. The study found, for example, that those who attend Catholic schools were more likely than Catholics who did not attend a Catholic school to say that helping those in need is very important to their sense of what it means to be a Catholic and were more likely (than their Catholic counterparts who did not attend a Catholic school) to say that living a life consistent with Church teaching is very important. Mark Gray and Paul M. Perl, *Sacraments Today: Beliefs and Practice Among U.S. Catholics*, Center for Applied Research in the Apostolate (CARA), Washington, D.C.: April 2008, 110.

students not because they are Catholic, but because we are Catholic,” is the simplest explanation. Catholic schools offer all students, regardless of religious belief, the opportunity for an excellent education. Catholic schools serve as:

[B]eacons of hope for those who are poor in the goods of this world...The Church is determined to serve the human and social needs of the poor and to provide them a distinctively Catholic education, which includes a thorough and faithful catechesis. Many of these Catholic schools are genuine centers of evangelization that effectively proclaim the Gospel to those who have never heard it before as well as to those who have heard it but have not been moved by it to transform their lives.<sup>8</sup>

In his recent trip to the United States, Pope Benedict XVI, spoke of the need to ensure that Catholic schools are available to students of all religious, social and economic strata. The Holy Father explained:

No child should be denied his or her right to an education in faith, which in turn nurtures the soul of a nation...A university or school's Catholic identity is not simply a question of the number of Catholic students. It is a question of conviction – do we really believe that only in the mystery of the Word made flesh does the mystery of man truly become clear? Are we ready to commit our entire self – intellect and will, mind and heart – to God? Do we accept the truth Christ reveals? Is the faith tangible in our universities and schools? Is it given fervent expression liturgically, sacramentally, through prayer, acts of charity, a concern for justice, and respect for God's creation? Only in this way do we really bear witness to the meaning of who we are and what we uphold.

Catholic identity is not dependent upon statistics. Neither can it be equated simply with orthodoxy of course content. It demands and inspires much more: namely that each and every aspect of your learning communities reverberates within the ecclesial life of faith. Only in faith can truth become incarnate and reason truly human, capable of directing the will along the path of freedom. In this way our institutions make a vital contribution to the mission of the Church and truly serve society. They become places in which God's active presence in human affairs is recognized and in which every young person discovers the joy of entering into Christ's "being for others."<sup>9</sup>

While daily religion class may be what comes to mind first when one thinks of Catholic identity, it is the totality of the Catholic school experience – prayer, sacraments, scripture, service, respect for others, evangelization, and welcoming education for all, to name a few – that form the basis of a school's Catholic identity. The recommendations below are offered to strengthen and improve the elements of Catholic identity in the schools of the Archdiocese of Baltimore.

## Catholic Identity Indicators

**✦ Recommendation 1:** The Committee recommends that the Superintendent of Catholic Schools lead a review of the viability indicators of Catholic identity contained in the Archdiocese's Catholic School Viability Assessment document and:

- 1) develop best practices and benchmarks to assist schools in meeting these indicators;
- 2) develop clear criteria regarding the implementation of the Viability Assessment report recommendations on Catholic identity and hold schools accountable for implementation of the recommendations.

The Committee also recommends that an additional viability indicator be added regarding schools demonstrating a connection to a local parish or parishes.

Catholic identity is one of the Archdiocese's 10 Factors of Viability for Catholic Schools. Included in this factor is the following goal of Catholic identity: "To develop, deliver, and sustain a distinctive Catholic identity in all schools within the Archdiocese." In support of this goal, six viability indicators are given.<sup>10</sup> These indicators formed the basis for the Viability Assessment teams' recent review of each school's Catholic identity. In 2009, every non-independent school in the Archdiocese participated in a Viability Assessment. Detailed Profile Reports were shared with each school which

<sup>8</sup>USCCB, *National Directory for Catechesis*, 262.

<sup>9</sup>Address of His Holiness Benedict XVI. Meeting with Catholic Educators (Washington, D.C. April 17, 2008).

<sup>10</sup>The six viability indicators for Catholic identity of a Catholic school include:

1. The school holds meaningful liturgical celebrations on a regular basis with a special emphasis on the Eucharist.
2. A climate of harmony is created by affirming the self-worth of all students, allowing ample time to bring the Beatitudes to life, guide choices, and demonstrate the social consequences of the demands of the Gospel.
3. The school reflects an attitude and practice of prayer and contemplation throughout the daily interactions of students and adults.
4. An age-appropriate understanding of Scripture and Faith of the Church is fostered.
5. Students prepare for, actively participate in, and reflect on Christian Service and understand the impact these efforts will have on building the Kingdom of God.
6. The school community understands and can articulate the mission.

highlight recommendations for improvement. With regard to Catholic identity, recommendations fell into the following categories: ACRE (Assessment of Catholic Religious Education) test, mission, evangelization, Catholic social teaching, service, faculty, liturgy and other worship, prayer, respect and Catholic identity visibility. The recommendations offer direction for principals and the Committee recommends their adoption. To measure and evaluate such implementation, the Superintendent should develop criteria, including who will perform assessments and what is effective implementation, in order to assure that the recommendations have been implemented.

While these recommendations provide schools with some direction, there is a need for increased guidance regarding best practices or age-appropriate practical applications that could be used by administrators and teachers to enhance a school's Catholic identity. The Committee recommends that the Superintendent of Catholic Schools, working with heads of school, canonical representatives,<sup>11</sup> pastors, and the Department of Evangelization, review the indicators of Catholic identity contained in the Archdiocese's Catholic School Viability Assessment document and develop best practices and age-appropriate practical applications to assist schools in meeting the Catholic identity objective contained in the Factors of Viability.<sup>12</sup> In addition, the Committee recommends that the Department of Catholic Schools develop benchmarks to measure the ability of the school to meet the viability indicators. Catholic identity is paramount to the Archdiocese's school system and assuring accountability is necessary in protecting and maintaining Catholic identity.<sup>13</sup>

Finally, the Committee recommends that a seventh viability indicator be added that states: "The school demonstrates a connection to a local parish or parishes." The Committee is concerned that parishes and Catholic schools maintain their connections, helping the faith life of students and parishioners to be enriched by each other.

## Spiritual Life of the School

**Recommendation 2:** The Committee recommends that the head of school clearly identify the spiritual leaders of the Catholic school to the school community, and that the spiritual leaders be present in the school community and work closely with the head of school to guide the sacramental and spiritual life of the school.

Throughout the listening sessions and focus groups, and through public comments, the Committee heard from parents regarding their desire to have an increased presence of Catholic priests and religious in their schools. Catholic school principals and teachers also expressed a desire to have priests more available for liturgy, reconciliation, devotions and prayer.

The spiritual leaders of a Catholic school – most notably the canonical representatives (in an Archdiocesan Collaborative School), school chaplains, pastors, presidents and principals – not only provide their own witness to Catholic faith, but also lead faculty, staff and students in the practice of that faith. The school community needs to be aware of these spiritual leaders and the collaboration of these leaders with all faculty and staff is important. The head of school is responsible for assuring that these leaders are known to the school community and participate regularly in the life of the school.

Under the new governance model recommended in this Strategic Plan, canonical representatives, working with Principals and School Chaplains, will be instrumental in leading the spiritual life of the school. In addition, the canonical representatives are responsible for integrating parish life into the school and school life into the parish or parishes.<sup>14</sup>

## Formation and Professional Development

**Recommendation 3:** The Committee recommends that a professional development program that emphasizes Catholic identity and mission effectiveness, conducted in partnership with representatives of interested religious communities, be developed to address the ongoing formation of Catholic school principals and school boards.

The formation and development of Catholic school leaders often centers on skill development related to various aspects of school leadership, such as academics, advancement, finances, facilities, marketing and enrollment, and other subjects. While these are important issues for any school, the Committee recognizes that leading a Catholic school also requires presidents, principals and Catholic school board members to be equipped for the Catholic ministry demanded of their positions. Professional development, particularly for Catholic school board members, many of who become board members not because of their expertise in Catholic identity but because of their experience in temporal issues affecting the school, is particularly appropriate.

<sup>11</sup>A canonical representative, a new position created for the Archdiocesan Collaborative School model, supports the spiritual and sacramental life of the school. See discussion in Governance, p. 25.

<sup>12</sup>Two National Catholic Education Association publications may be very helpful in this review: *Catholic Identity Assessment and Planning in the 21st Century* and *Architects of Catholic Culture: Designing and Building Catholic Culture in Catholic Schools*.

<sup>13</sup>Under the new accreditation system (see discussion in the Academics section on p. 19 the Factors of Viability, including Catholic identity, will become the framework for school accreditation and thus this represents one means of assuring Catholic identity accountability.

<sup>14</sup>See Appendix C for an expanded discussion on the role and responsibilities of the canonical representative.

In 2009, Archbishop O'Brien initiated a conversation with the superiors of religious communities serving throughout the Archdiocese about the ongoing formation of Catholic school principals and school boards. As a result of that conversation, this group of superiors is prepared to make recommendations on a Mission Effectiveness and Catholic Identity for Catholic School Leaders program. The Committee endorses the development of this program.

## Principal and Teacher Prerequisites

**Recommendation 4:** The Committee recommends that the Archdiocese's requirement, that all heads of school and teachers of religion in Catholic schools be Catholic, be affirmed.

Assuring that those who are Catholic perform instruction in the Catholic faith is an important requirement and must be complied with by heads of school when making decisions about who teaches religion.

**Recommendation 5:** The Committee recommends that where there are applicants for a position in a Catholic school, and all other qualifications of the applicants are equal, that preference in hiring be given to a Catholic applicant.

Individuals who are Catholic strengthen the Catholic identity of schools through their knowledge and practice of the Catholic faith. Their presence in the school, whether as teachers, administrators or support staff, helps create a greater sensitivity to Catholic identity throughout the life of the school. It is recommended that the Archdiocese's Division of Human Resources cultivate a larger pool of qualified Catholic applicants to fill all types of open positions in schools. The Committee recommends that preferential hiring of Catholics be undertaken only when all other qualifications of Catholic applicants and those of other faiths are equal.

**Recommendation 6:** The Committee recommends that all principals and faculty have appropriate catechist certification and that non-Catholic faculty complete the *Basics of Faith* (for elementary school teachers) or *Essentials of Catholic Identity* (for secondary school teachers) programs and be required to update and repeat this continuing education on a regular basis.

Currently, elementary school principals are required to have Advanced

Catechist certification. All Catholic elementary teachers for grades K – 5 who are teaching religion are required to have a Catechist certification. Catholic elementary school teachers who are not teaching religion are required to have a Preliminary Catechist certification. Youth Ministry certification is required for Catholic faculty teaching at either the middle or secondary levels. Principals and religion teachers in middle and high schools are required to have an Advanced Catechist Certificate in Youth Ministry. Preliminary youth ministry certification is required for all Catholic teachers who are not teaching religion. All faculty members of other faiths are required to complete one of two basic courses in the Catholic faith (the *Basics of Faith* for elementary school teachers or *Essentials of Catholic Identity* for secondary school teachers). The Committee's recommendations call for faculty members of other faiths to participate in an update or refresher course on a regular basis.

Current compliance with the catechist certification program is lacking. The Archdiocese will soon be instituting a new professional development program for lay ministry, including catechetical requirements for teachers. Existing certification levels will be aligned with the new system and current certifications will be acknowledged until such time as the previous certification expires.

Proper professional credentialing of Catholic school principals and teachers, as well as professional development of teachers of other faiths, with respect to the Catholic faith is a critical prerequisite for teaching in a Catholic school. The Committee recognizes that implementing this requirement will take some time. Nevertheless, all principals and teachers ultimately must be held accountable for their compliance with this requirement.

## Curriculum

**Recommendation 7:** The Committee recommends that the elementary school religion curriculum, currently under development, be completed and implemented and that the Department of Catholic Schools develop a means to track and hold schools accountable for implementation of the new religion curriculum.

The Department of Catholic Schools and the Department of Evangelization have been working to develop an elementary school religion curriculum that will be an important educational asset to religion teachers. The Departments are urged to complete this curriculum and conduct in-service meetings to assure effective implementation in the near future. The Department of Catholic Schools should develop a means to determine

whether implementation has occurred and determine effectiveness of the new curriculum.

## Student Assessment

**Recommendation 8:** The Committee recommends that all schools in the Archdiocese be required to administer annually the Assessment of Catholic Religious Education (ACRE) test to students (in grades 5, 8, 9, and 12) and that additional assessment modalities be considered to assist schools in evaluating effectiveness of the religion curriculum, instruction and school climate.

The ACRE test is currently required for all elementary school students (in grades 5 and 8) and all secondary school students (in grades 9 and 12); however, in practice there have been several schools that have failed to administer the test. Thus, improved accountability of principals in assuring that this test is administered is needed. In addition, the Committee recommends that the Archdiocese provide support for religion teachers on how to effectively use the ACRE test scores to enhance student achievement and inform future religion instruction.

The Committee acknowledges that it may be helpful to broaden the opportunities, beyond the ACRE test, to assess student success in meeting the goals of the religion curriculum. The Committee recommends that the Department of Catholic Schools explore additional means of assessing the effectiveness of the religion curriculum and instruction.

## Parent Faith Development

**Recommendation 9:** The Committee recommends that the Archdiocese explore programs that will enhance the faith development of Catholic parents and familiarize parents of other faiths with the Catholic faith.

Parents of children in Catholic schools have widely varying degrees of faith formation experience. As their children learn and experience the Catholic faith in Catholic schools, this presents an opportunity for additional catechizing of parents. For Catholic parents, this may mean expanding their knowledge about scripture, prayer, theology and worship, as well as receiving information about nearby parishes that would welcome them back if they have been away from their faith practice. For parents of other faiths, this could include explaining the meaning of the religion curriculum their

child will experience each year, as well as offering opportunities to explore the Catholic faith. Past experience has shown that children, and sometimes their parents, may come into the Catholic faith, based on their experience in a Catholic school. For example, in 2010, 81 students and 14 adults from schools in the Archdiocese were received into the Church at Easter. The Committee believes there are opportunities for education and evangelization that will benefit Catholic school parents and recommends that possible programs for implementation be explored or, if needed, developed by the Archdiocese.



Owen Streaney III, *The Catholic Review*

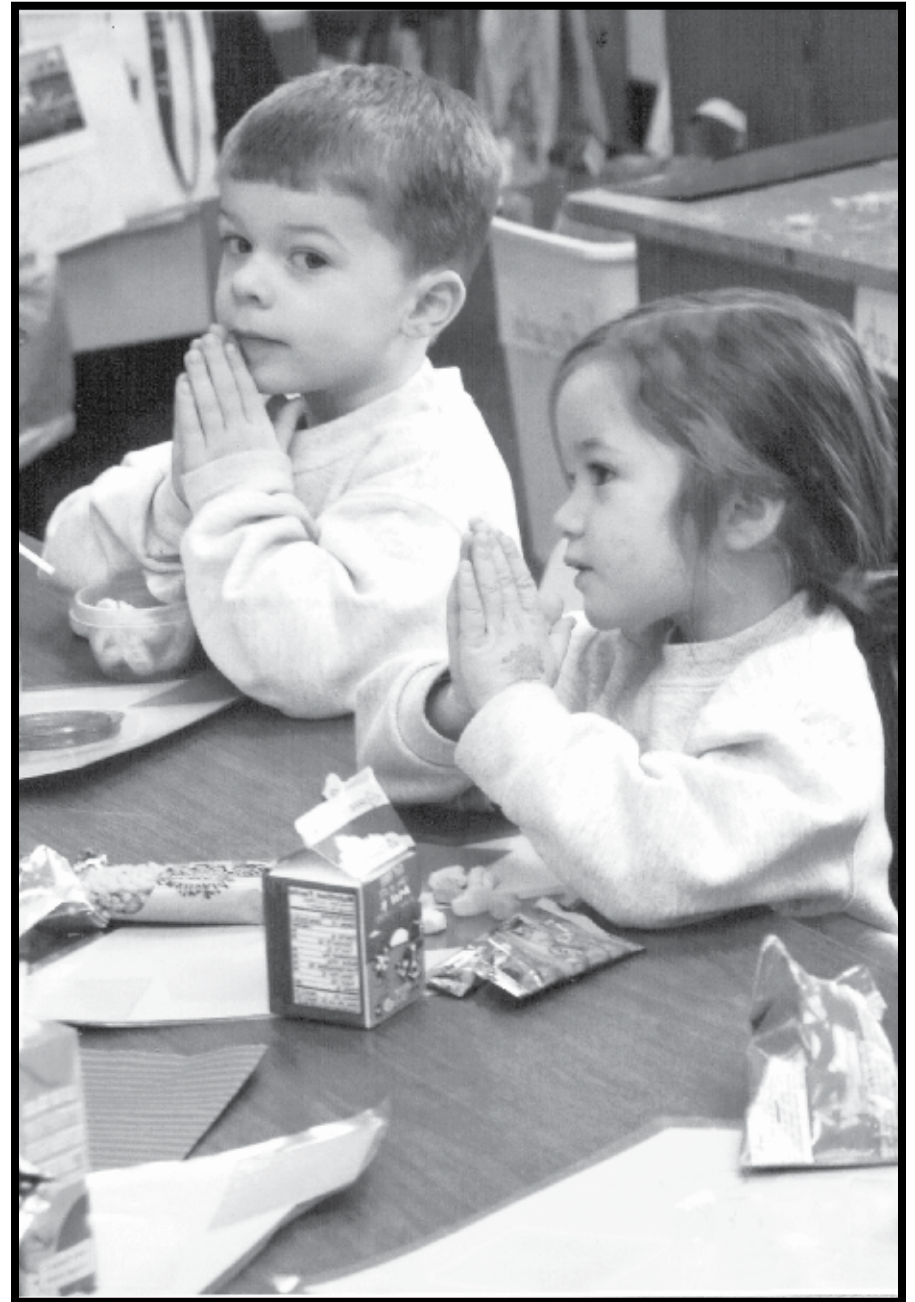
## Sacramental Preparation

**Recommendation 10:** The Committee recommends that families be educated about immediate, remote and ongoing catechetical preparation and the role of the school and the parish in sacramental preparation.

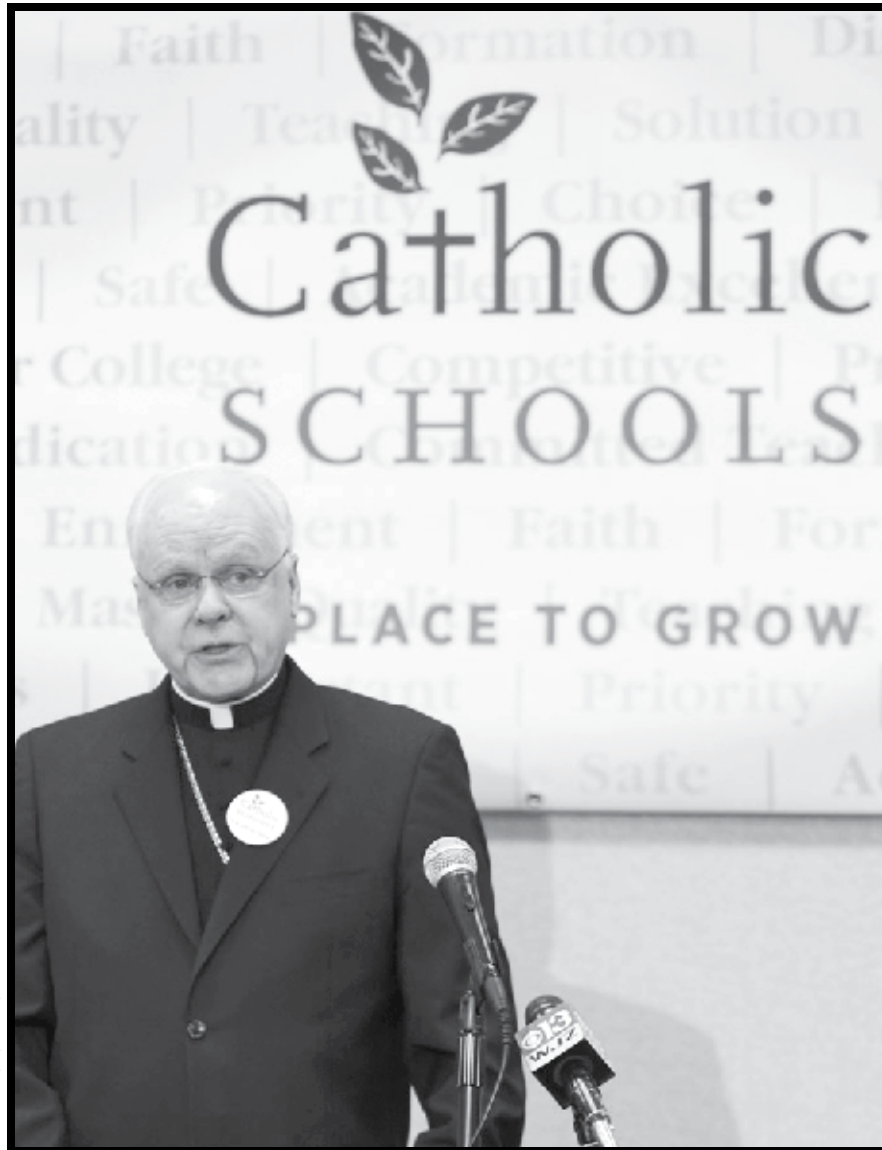
During the listening sessions and focus groups, some parents of Catholic school students objected to their children having to participate in parish sacramental programs and asked why this could not happen in their child's Catholic school. This question made clear the Church's need to improve communication regarding the relationship of schools to the wider Church, the different types of catechetical preparation for the sacraments, and the benefits of parish community preparation.

Remote preparation for the sacraments and ongoing development in faith formation does take place in Catholic schools. For children not attending a Catholic school, this preparation takes place in religious education classes. The immediate preparation, however, for both Catholic school and religious education students, takes place in the parish where the sacrament will be received. Sacraments are celebrations of the faith life of the parish community and receiving sacraments in the parish underscores the centrality of the parish in faith development and practice. In addition, the parish celebration of the sacraments, which brings together students from many different schools, demonstrates the universality of the Church and the common bond of faith as celebrated by that parish community.

The Committee recommends that enhanced education for both parents and students about the importance of immediate preparation for the sacraments in the parish be developed. Since that information will also be useful for parents and students in religious education programs, collaboration with the Department of Evangelization would be beneficial. Additionally, the Department of Catholic Schools and the Department of Evangelization should review the curriculum for immediate and remote preparation in order to assure that overlap of subject content is minimized so that remote and immediate preparation are not repetitive. In addition, the Committee recommends that the Archdiocese study ways to reduce the inconsistency of practice for sacramental preparation.



# Academic Excellence



## Introduction

Academic excellence is and must continue to be a hallmark of Catholic education in the Archdiocese of Baltimore. In 2009, elementary and middle school students in Catholic schools in the Archdiocese exceeded the national average on standardized test scores in every age group tested and in many cases students scored in the top third of students nationally.<sup>15</sup> Catholic schools in the Archdiocese have a proud history of preparing students for high school, college, and life. Each year, approximately 97 percent of students graduate from high school and 95 percent of students attend college.

In its past year of study and analysis, the Blue Ribbon Committee has had the opportunity to review many facets of the educational quality of Catholic schools. In listening sessions, focus groups and public comments, there was wide agreement that Catholic schools could grow in academic excellence by moving beyond merely 'teaching to the middle' to focus more on meeting the academic needs of students at either end of the learning spectrum. Parents asked for an expanded offering of courses, programs, extracurricular activities, and resources for special needs students. Parents and teachers also felt that schools would benefit from a general assessment of curricular programs and grading systems for greater consistency throughout the system, without overlooking individual needs.

The Committee spent a significant portion of its discussion on accountability and recommendations that look to the Superintendent of Schools and the Department of Catholic Schools, as well as to heads of school and faculty for implementation. Emphasis on student results, beyond standardized test scores, and inculcating school administration with a culture of accountability are at the heart of many of the Committee's recommendations. Assessing student performance, attaining accreditation of schools and certification of individuals, providing teachers with increased professional development opportunities, and increasing the diversity and expanse of educational programs are the building blocks for a strong academic Catholic school system in the coming decades.

<sup>15</sup>The Archdiocese uses the tenth edition of the Stanford Achievement Test, known as the Stanford 10. The test developers incorporate national standards as appropriate for different ages and grades. The 2009 test scores in the higher grades were particularly strong, with average scores for 7th grade students placing in the 74th percentile in reading, language and math, while 8th grade students placed in the 73rd percentile in reading and math, and the 76th percentile in language. As with all norm-referenced tests, the average for all students who take the exam is 50 percent.



## Student Performance and Assessment

**Recommendation 1:** The Committee recommends that the Superintendent of Catholic Schools be charged with the accountability of student performance and the curriculum delivery needed to support a school system that produces successful students.

The Committee believes that accountability is a key factor in a successful school system and that responsibility for accountability must rest with the Superintendent. Putting in place school leaders who understand the importance of current research in learning and curriculum development, as they relate to student performance, is critical to the academic success of Catholic schools.

**Recommendation 2:** The Committee recommends that the Department of Catholic Schools implement a system that supports every school in developing a student assessment plan that is aligned with curriculum goals and objectives, is reflected in classroom instruction, and seeks continuous improvement.

Without a comprehensive approach to assessment, it is difficult to accurately or validly measure learning or the effects of the academic program and instruction. Assessment plans should detail how results will be used in future instruction and in possible programmatic changes.

Taken together, the multidisciplinary approach proposed in this recommendation will allow educators to assess student progress and make data-driven decisions regarding program adjustments or instructional strategies. The Committee recommends that assessment literacy by principals and teachers be increased and that goals be established for utilization of testing assessment in refining instructional practices. Enhanced professional development opportunities may be needed to assure that teachers and principals are proficient in utilizing assessment tools.

The Committee also recommends that the Department of Catholic Schools continue its work to implement a Growth Model Analysis that reflects, via standardized test data, growth in student performance across the Archdiocese, as well as the academic growth of students for each school. While standardized test scores can assist teachers and parents in assessing students' progress, it is also important to examine increases in those scores over time, as well as other factors that indicate whether a child is growing academically. Understanding student growth is a multifaceted process that needs to include a means to measure whether or not a student has made one

year's progress. This analysis amplifies test score data and can assist teachers and administrators in understanding student performance more clearly, as well as providing information upon which to base decisions regarding classroom instruction.

The committee also recommends that individual student portfolios be developed to reflect the growth of the whole child, beyond standardized test scores. These portfolios document different types of academic growth, such as writing or problem solving, as well as the student's spiritual growth. They allow teachers to track a student's progress more broadly and can help identify the need for differentiated instruction.

**Recommendation 3:** The Committee recommends that the Department of Catholic Schools establish grade level academic standards and give aggressive attention and intervention to schools that have student achievement that is below standard.

Students may perform below grade level for any of a number of reasons. Rooting out the cause for underperformance and making needed adjustments is an important task of teachers and school leaders. The quality of education in Catholic schools hinges upon teaching that results in measurable learning, as well as an understanding of each child's needs. Academic excellence comes about when these factors are accounted for, when standards are met, and achievement progresses.

## Accreditation and School Recognition

**Recommendation 4:** The Committee recommends that the Department of Catholic Schools work to implement fully the new accreditation program with the Southern Association of Colleges and Schools (SACS) Council on Accreditation and School Improvement (CASI) and that the Archdiocesan Catholic School Board oversee that the accreditation process and this Strategic Plan are compatible.

In April 2010, the Archdiocese and all Archdiocesan Catholic schools were awarded accreditation from the Southern Association of Colleges and Schools (SACS) Council on Accreditation and School Improvement (CASI).<sup>16</sup> Formerly affiliated with the Middle States Association of Colleges and Schools, the Archdiocese's new accreditation process makes the Department of Catholic Schools responsible for assuring that accreditation standards are upheld both at the Archdiocesan level and at the school level in order for schools to maintain their accreditation. The accreditation of both the

Archdiocese and a group of schools will be reviewed by SACS CASI every five years, although every principal will be interviewed every five years by SACS CASI. The Archdiocese believes that this new system will provide a unified accreditation process and will strengthen the entire school system. Because of the magnitude of this accreditation change, the Committee recommends oversight by the new Archdiocesan Catholic School Board. Since the SACS CASI's accreditation will rely upon the Archdiocese's Factors of Viability, it is very important that school principals, working with their faculty and schools boards, address the recommendations contained in their 2009 Viability Assessment reports.

**Recommendation 5:** The Committee recommends that the Department of Catholic Schools review the Factors of Viability model (which currently applies to all levels of schools – elementary, middle, and high school) and refine it for specific application at the elementary and high school levels.

While the current Factors of Viability contain a comprehensive set of criteria for school evaluation intended for all levels of schools (elementary, middle and high schools), the Viability Assessment materials could better reflect the differences particularly in elementary and high school objectives, curriculum, and operation. Thus, refining these documents to distinguish between elementary schools and high schools via separate Viability Assessments is recommended.

**Recommendation 6:** The Committee recommends that the Department of Catholic Schools facilitate individual schools' applications for U.S. Department of Education Blue Ribbon School status.

Thirteen Catholic schools in the Archdiocese have been named National Blue Ribbon Schools, the highest academic honor bestowed upon a school by the U.S. Department of Education. The Blue Ribbon Schools Program honors public and private elementary, middle and high schools that are either academically superior or that demonstrate dramatic gains in student achievement to high levels. The Committee believes that more Catholic schools in the Archdiocese are worthy of this recognition, which can be a significant marketing and recruitment tool, as well as an affirmation of the achievements of students, teachers and the entire school community, but that schools may need assistance in demonstrating completion of the requisite milestones for Blue Ribbon recognition. It is recommended that the Department of Catholic Schools identify schools that may be eligible for this challenging review process and, if the school is interested, facilitate

applications by identifying existing Blue Ribbon Schools that could mentor and guide interested schools in applying.

## Certification

**Recommendation 7:** The Committee recommends that by July 1, 2014, all current principals and teachers have current up-to-date Maryland State Department of Education (MSDE) certification for their position. It is also recommended that newly hired principals and teachers have three years, from their date of employment, to attain MSDE certification for their position.

Assuring that all principals and teachers have the requisite educational credentials, through a current MSDE certification, is essential for a sound school system. The Committee recommends that all principals and teachers currently working in the Archdiocese of Baltimore school system have up-to-date MSDE certification for their position. To allow time to meet this certification requirement, the Committee recommends that current principals and teachers be given until July 1, 2014. Likewise, the Committee recommends that all newly hired principals and teachers be given three years, from their date of employment, to attain MSDE certification for their position. The Committee encourages that schools seek to fill positions with those who have already attained certification. Further, recognizing that there may be circumstances that deserve special review and potential exemption, the Committee recommends that the Department of Catholic Schools develop a compliance framework for these certification requirements that takes into account senior status teachers and provides alternative routes to certification. The Committee also recommends that the Department of Catholic Schools work with MSDE to develop a framework for certification of Archdiocesan teachers that takes into account upcoming changes in the MSDE certification structure.

## Professional Development

**Recommendation 8:** The Committee recommends that the Department of Catholic Schools enhance teacher professional development programs that will improve the quality and effectiveness of classroom instruction.

The Department of Catholic Schools is currently working with College of Notre Dame of Maryland to provide professional development courses for Catholic teachers, particularly for schools with access to Title II funds.<sup>17</sup>

<sup>17</sup>Title II of the federal Elementary and Secondary Education Act provides funding to support professional development activities for teachers in order to improve their content knowledge and instructional practice.

Expanding this opportunity for a greater number of teachers should be explored. Likewise, programs for teachers at Loyola University Maryland and Mount St. Mary's University should be promoted. The Department of Catholic Schools may also wish to consult with the Directors of Professional Development in public school systems (in Maryland counties and Baltimore City) to determine if there are professional development programs that the Archdiocese can partner with, beyond those that the Archdiocese already sponsors, to provide teachers with information on the latest trends and techniques in education.

As the demographics of school populations change, it will become increasingly important that teachers and staff understand these changes and how they might affect instructional practice, as well as teacher, student and family interactions. While diversity is included in the Factors of Viability, opportunities for professional development on this subject have been limited.



Queen Sweeney III, *The Catholic Review*

Anticipating the school of tomorrow and its demographic makeup is an important planning consideration for principals and teachers and must be supported by professional development.

## New Teacher Recruitment

**Recommendation 9:** The Committee recommends that the Department of Catholic Schools work with schools to create an effective process to recruit Catholic school teachers.

Through focus groups, consultations and listening sessions, the Committee heard from teachers, principals and parents throughout the Archdiocese about the great advantages of teaching in Catholic schools. Although our teachers make financial sacrifices to teach in our schools, they greatly appreciate the opportunity they have to pass on the Catholic faith to their students. Continuing to attract qualified new teachers is an ongoing challenge in our school system. It is incumbent upon the Department of Catholic Schools to continue to build the strongest cadre of teachers for today's and tomorrow's Catholic schools and to have a plan in order to assure effective teacher recruitment and retention.

## Curriculum & Instruction

✦ **Recommendation 10:** The Committee recommends that the Superintendent of Schools oversee the development of a comprehensive school curriculum and provide support to Catholic schools to assure implementation and accountability.

A thorough review and updating of the Archdiocese's curriculum should be undertaken through a collaborative process with principals and teachers. Obtaining expertise from curriculum specialists to assist with this process will be required to obtain the most up-to-date information about new strategies and approaches to curriculum content and delivery. The Committee realizes that this curriculum updating will require a considerable commitment of resources and the Committee recommends that the Department of Catholic Schools commit to providing those resources. Attempts in the past to address this curriculum need, by means of a committee, have been ineffective and are not acceptable.

The Committee recommends that this curriculum updating include a review of the recently developed K-12 Common Core State Standards.<sup>18</sup> Additionally, this review should include an evaluation of the curriculum mapping program and identify ways for schools to utilize this tool more effectively to their benefit.

After the new curriculum is developed, curriculum specialists should be available to assist schools in strategic direction and respond to requests for assistance in implementation of the new curriculum and provide assistance in selecting appropriate materials to meet the needs of specific school populations. Accountability measures for the alignment of instruction with established curriculum goals and objectives should be developed.

<sup>18</sup>These recently developed standards were prepared by the National Governors Association Center for Best Practices and the Council of Chief State School Officers. "These standards are: aligned with college and work expectations; clear, understandable and consistent; include rigorous content and application of knowledge through high-order skills; build upon strengths and lessons of current state standards; informed by other top performing countries, so that all students are prepared to succeed in our global economy and society; and evidence- and research-based." Draft K-12 Common Core State Standards Available for Comment, Accessed at [www.ccsso.org](http://www.ccsso.org).

As part of this curriculum review, it is recommended that input be obtained from colleges and universities and high schools to identify curricular gaps that need to be addressed in preparing students for the next level of their education. As students move from middle school to high school or from high school to college, gaps in their knowledge and/or skills can impede progress at the next level. Closing the gaps between educational levels should be a part of curriculum improvement. Finally, it will be important to assist schools with special academic programs (such as the dual language school, New American Academy model, Montessori, and STEM programs) in aligning the curriculum within the pedagogy of these programs.

**Recommendation 11:** The Committee recommends that principals ensure that teachers are familiar with and proficient in using instructional methods, accommodations, and other strategies to better meet the varied learning styles of students, and particularly those with learning challenges.

As education leaders, principals must encourage, motivate, offer recommendations, and provide professional development so that instruction is delivered in appropriate ways to many different types of learners. Teachers across the Archdiocesan school system may benefit from additional in-service opportunities on differentiated instruction and brain-based learning and how that knowledge impacts the design and implementation of appropriate instructional practices.

**Recommendation 12:** The Committee recommends that where possible, schools explore and take advantage of opportunities to share academic and co-curricular offerings.

Schools in close geographic proximity, particularly high schools, could achieve greater course and activity selection for students and reduce personnel and instructional costs by sharing offerings with neighboring schools. In addition, high schools should explore expanding course offerings by working with local community colleges to allow matriculation of high school students for courses.

**Recommendation 13:** The Committee recommends that the Department of Catholic Schools identify web-based programs to provide a wider variety of curriculum offerings to meet the needs of all students across the Archdiocese.

Online education will never completely replace bricks-and-mortar

schools in the Archdiocese, but it is likely that online resources could significantly expand course offerings and classroom resources that would enhance instruction. A comprehensive review of what is available through online providers should be undertaken to determine what, if any, advantageous linkages could be established to benefit Catholic school students.

## Educational Programs & Excellence

**Recommendation 14:** The Committee recommends that the Department of Catholic Schools develop and implement plans that will help assure the success of the following new academic programs announced as part of the Archdiocese's Consolidation Plan:

- Implement a dual language program in one elementary school.
- Begin a Science, Technology, Engineering & Math (STEM) program in four elementary schools;
- Initiate a primary Montessori program in one elementary school;
- Expand the PRIDE (Pupils Receiving Inclusive Diversified Education) Plus Program – to meet the needs of children with documented learning challenges — by expanding the program to four elementary schools, and providing professional development for teachers across the Archdiocese to address learning challenges;
- Implement elements of the New American Academy model at one elementary school;
- Explore development of an International Baccalaureate (IB) program at one high school in the Archdiocese; and
- Develop Community Schools at four elementary schools in order to expand the breadth of services for students and families at these schools.

**Recommendation 15:** The Committee recommends that every elementary school have a pre-kindergarten program by 2014. The Committee also recommends that the limited number of half-day kindergarten programs currently being offered be made full day.

In December 2007, the State of Maryland's Task Force on Universal Preschool Education submitted a report to the Governor recommending the expansion of pre-kindergarten to all four-year olds.<sup>19</sup> For the 2009-2010 school year, 70 percent of elementary schools in the Archdiocese have a pre-k4 (four-year-old) program, with a total enrollment of 1,029 students across all schools. In addition to school readiness and long-term

<sup>19</sup>Fiscal year 2009 was used by the state as a program planning year and a business plan was developed for this program, called *Preschool for All*.

developmental benefits of preschool education for children, it is important that the Archdiocese remain competitive with the public school and other nonpublic school systems in providing a high quality preschool education program. The National Institute for Early Education Research's 10 Quality Benchmarks for High-Quality Preschool Education should be considered in developing an Archdiocesan-wide preschool program.

A limited number of schools in the Archdiocese still offer half-day kindergarten as an option. By Maryland law, all children must attend kindergarten and, starting in the 2007-2008 school year, kindergarten programs in public schools became full day programs, operating for 6.5 hours a day. In light of the state's move to full day kindergarten for all students, the Committee recommends that the half-day option for kindergarten be eliminated and that all kindergarten programs in Catholic schools be full day.

**Recommendation 16:** The Committee recommends that the Department of Catholic Schools evaluate the need for increased before- and after-school care and summer programs, especially as a means of providing academic support, in addition to helping meet the needs of working families and providing safe environments for students.

Programs outside traditional school hours often provide additional academic enrichment opportunities for elementary and middle school students. For many students, these programs help meet the needs of working parents and provide a safe place for students to do homework and engage in extracurricular activities. The Committee recommends that the Department of Catholic Schools assess the need throughout the Archdiocese to expand the availability of before- and after-school care and summer programs and, if warranted, develop a plan, including potential sources of funding, to assist schools in addressing such need.

**Recommendation 17:** The Committee recommends that the Department of Catholic Schools continue to dialogue with Catholic homeschooling families about the education needs of this student population.

For more than a decade, the Archdiocese has supported the right of Catholic parents to home-school their children. The Archdiocese published a position paper, entitled *Homeschooling: A Gift to the Church*, which affirms parents as the primary educators of their children. The Archdiocese also has sought other ways to support and communicate with homeschooling parents.

As the Department of Catholic Schools explores possible online educational options developed to supplement instruction in traditional Catholic schools, it should explore whether such resources could also serve homeschooled students. Online resources may also provide an avenue to increase the connectedness of homeschooled students to the Catholic school system of the Archdiocese.

**Recommendation 18:** The Committee recommends that Catholic elementary schools in the Archdiocese of Baltimore expand the availability of guidance counseling services.

Children who experience violence, the loss or injury of a parent, sibling or other close relative, who witness crimes, or live with or are regularly exposed to adults experiencing addiction, or experience illness or other trauma, have lives that are significantly challenged. These children's academic progress and ability to learn can be terribly disrupted by these events, and school personnel are often caught off guard and/or are unprepared for how to assist children with these challenges. Children who are traumatized also may experience relational difficulties with teachers and other students. While principals and teachers have sensitively assisted such children in the past, expanding access to guidance counselors in elementary schools is recommended.

## Technology

**Recommendation 19:** The Committee recommends that the Department of Catholic Schools assist schools in incorporating the use of technology in the curriculum by more completely integrating academic subject areas with technology applications and by continuing to provide teacher professional development for successful technology integration.

Ensuring that technology is utilized in instructional practice across subject areas is an ongoing challenge for teachers and needs persistent and creative attention in our schools. In conjunction with the curriculum development recommendation previously noted, the Committee believes an added focus of technology utilization throughout the curriculum should be examined. In order to assure efficacious implementation, professional development for faculty regarding technology and curricular interface is an important ongoing need.

For additional recommendations concerning technology equipment, please see the Technology subsection of the Stewardship section (on p.37).

# Governance



Owen Sweeney III, *The Catholic Review*

## Introduction

Effective school governance is an important factor in the success of any school. For Catholic schools in the Archdiocese of Baltimore, governance involves several parties and varies according to the structure or model in place at each school. While the Archbishop, as the Archdiocesan leader, has authority directly related to the Catholic identity of all schools in the Archdiocese, for the most part, the day-to-day operation of schools rests with the Superintendent of Schools, local pastors, principals, and school boards. Depending on the governance model in operation, these persons have different rights and responsibilities.

The Blue Ribbon Committee spent considerable time examining the different governance models currently operating in Catholic schools in the Archdiocese; these include:

- **Parish Schools:** The pastor has the primary responsibility and decision-making authority over the school. He hires and dismisses the principal. The school board is advisory.
- **Interparish or Regional Schools:** This type of school has an affiliation with two or more parishes, which share responsibility for the governance of the school. The pastors and school board may have greater or lesser authority depending upon the school bylaws.
- **Archdiocesan Schools:** Governance responsibility rests with the Archdiocese, including hiring and dismissal of the principal, and appointing a school board.
- **Independent Catholic Schools:** These schools are privately owned and incorporated and operate in the Archdiocese by following certain Archdiocesan precepts to retain their “Catholic” status. Most of the recommendations in this report do not apply to these schools because of their independent status.

The Committee concluded that aspects of the existing governance models can hinder effective leadership and operation of a school. The Committee believes that the most critical factor affecting the success of the school is the school principal, yet the Superintendent’s ability to remove or transfer a principal may be limited depending upon the governance model.<sup>20</sup> Likewise,

<sup>20</sup>In the Archdiocese of Baltimore, elementary schools are generally led by a principal, whereas high schools often are led by a president, who in turn hires a school principal.

expertise in curricular and instructional issues should rest with educators, yet in some schools those with primary decision-making authority, such as the pastor, may have little or no background in such matters.

Creating a school system requires coordinated leadership across the system and the ability to implement policy consistently and broadly and plan adequately and thoroughly for the future. For these reasons, the Blue Ribbon Committee views its recommendations regarding an Archdiocesan School Board and the new Archdiocesan Collaborative Model as paramount to the future success of the Archdiocese's school system.

## Archdiocesan Catholic School Board

✦ **Recommendation 1:** The Committee recommends the formation of an Archdiocesan Catholic School Board.

In the past year, the Archdiocese of Baltimore has undertaken a consolidation of schools, instituted new academic programs, and, with this Committee, prepared a Strategic Plan, recommending many systemic and operational changes affecting Catholic schools. While it is clear that significant improvements in schools and the system itself will occur, there is still much implementation and careful planning needed in the months and years ahead. For this reason, the Committee believes that a high level advisory group is needed to assist the Archbishop and new Superintendent in implementing the strategic plan and the new governance model recommended in this section. Therefore, the development and immediate convening of an Archdiocesan School Board is strongly recommended.

The Committee proposes that the Archbishop delegate specific responsibilities to the Archdiocesan School Board thereby empowering the Board with a strong oversight function to help assure the long-term viability of Catholic schools in the Archdiocese. Members of the Board will include representation from various constituencies, with an interest in Catholic school education, both across the Archdiocese and nationally. The Committee recommends that the inaugural Board members be appointed by the Archbishop; thereafter the Board will be self-perpetuating, with the Board electing its own members, subject to the Archbishop's reserved powers.

The Archdiocesan Catholic School Board will recommend policies consistent with the mission of Catholic schools in the Archdiocese of Baltimore and provide needed advice on administering an Archdiocesan school system. Specific charges to the Board will include:

- Advancing the mission of Catholic schools in the Archdiocese;

- Monitoring the implementation and updates of the Strategic Plan and overseeing ongoing strategic planning for Catholic schools in the Archdiocese;
  - Monitoring the implementation of the Archdiocesan Collaborative School model and recommending improvements or other changes, as well as monitoring the other existing models of governance;
  - Recommending policy to the Archbishop and Superintendent for approval, where needed;
  - Providing strategic direction and advice concerning advancement, finance, facilities, and leadership matters affecting Catholic schools; and
  - Working to develop and strengthen the capacity of local school boards.
- Bylaws for the Archdiocesan School Board are contained in Appendix C.

## Archdiocesan Collaborative Schools

✦ **Recommendation 2:** The Committee recommends a new Archdiocesan Collaborative School (ACS) model as the preferred model of governance for elementary schools.

A hybrid structure, the new Archdiocesan Collaborative Model combines the benefits of centralized governance with the benefits of local community involvement and a sense of ownership and decision-making at the local level.

The Committee recommends that centralized services for Archdiocesan Collaborative Schools, such as accounting, tuition collection, payroll, advancement, marketing, and technology, be provided at cost by the Archdiocese. The Head of School (President or Principal) will be selected, mentored, evaluated and dismissed by the Superintendent, with advice and input from the local school board for each Archdiocesan Collaborative School.

The local School Board will be comprised of individuals with strong ties to the local community. A Canonical Representative (e.g. local pastor), appointed by the Archbishop, will represent the interests of the parish communities in the area, coordinate priests to provide worship services at the school, and serve on the local school board.

The Blue Ribbon Committee recommends that the Archdiocese initiate implementation of the Archdiocesan Collaborative School (ACS) model, beginning in July 2010, with the goal of bringing approximately 10 to 12 schools to full implementation of the model within one year. The Committee recommends that, in subsequent years, all elementary schools move to this model. In addition, where appropriate, this model could be implemented in an Archdiocesan high school. A more complete description of the rationale for this model, as well as descriptions of its key elements, is contained in

Appendix D.

## **Principal Selection for Schools Using the Parish and Interparish Model**

**Recommendation 3:** The Committee recommends that the Superintendent work with pastors and/or school boards of parish and interparish schools to select, mentor, and evaluate school principals.

While the pastor or pastoral life director (PLD) (in the parish model) and the pastor and/or board (in the interparish model) have the authority to select and dismiss their school principals, the Committee recommends that the Superintendent work closely with these pastors, PLDs and school boards in the selection, mentoring, evaluation, and, if needed, dismissal of principals. All candidates for principal, including any candidate proposed by the pastor[s] or school board, should apply through the Department of Catholic Schools. It is recommended that the Superintendent of Catholic Schools propose three candidates to the pastor or pastoral life director (PLD), in the case of a parish school, and to the pastors/school board, in the case of an interparish school. The pastor or PLD, in the case of a parish school, and the pastors/school board, in the case of an interparish school, should interview all three recommended candidates. It is recommended that the pastor or PLD, in the case of a parish school, and the pastors/school board, in the case of an interparish school, select and hire one of the three candidates recommended by the Superintendent.

## **Principal Leadership Institute**

**Recommendation 4:** The Committee recommends the formation of a Principal Leadership Institute to provide continuing professional development for principals, assistant principals, and aspiring principals in order to support excellent leadership of Catholic schools in the Archdiocese.

Consistent with its finding that principal leadership is a critical factor in successful schools, the Committee believes that providing educational opportunities for current school leaders and developing new principals must be a priority for the Archdiocese. Current demographics suggest that the Archdiocese will need to identify several new principals over the course of the next decade to lead Catholic schools. A Principal Leadership Institute is needed to prepare for the future, as well as to support principals in addressing immediate administrative and operational leadership demands.

Because this recommendation was previewed in the Archdiocese's Consolidation Plan, the Archdiocese has already begun efforts to develop this Institute with the education departments of College of Notre Dame of Maryland, Loyola University Maryland, and Mount St. Mary's University. Professional development opportunities offered by the Principals Leadership Institute, for example through a Catholic School Leadership certificate program and conferences and workshops, are not in lieu of a Masters Degree and state certification, but rather will supplement those basic credentials expected of Catholic school leaders.

## **President/Principal Professional Growth and Evaluation Process**

**Recommendation 5:** The Committee recommends that the Superintendent develop a President/Principal Professional Growth Instrument.

Developing, mentoring and assisting presidents and principals in effectively leading their schools is a crucial responsibility of the Superintendent. Having an objective evaluation method for presidents/principals is an essential element of supporting these leaders and in holding them accountable for their performance. The Committee recommends that a new objective President/Principal Professional Growth Instrument be developed and employed. This instrument should be used, depending upon the governance model employed, by the Superintendent in reviews of heads of school, as well as by school boards in their annual evaluation of the head of school, and by presidents in their evaluations of principals who report to them.

**Recommendation 6:** The Committee recommends that the Department of Catholic Schools conduct a feasibility study to determine whether a sabbatical program for principals should be developed so that they can experience education from a broader perspective across the nation and within the local diocese.

The Committee recognizes that a limited sabbatical program would allow principals the opportunity to expand their knowledge and experience of education and enrich their growth as a school leader. Such a program might also be used as a competitive feature in order to attract principals or aspiring principals to our school system. The feasibility of such a program, including potential selection criteria and resources needed, should be reviewed.



## School Boards

**Recommendation 7:** The Committee recommends that every school have a school board and that the board be fully constituted and given opportunities for board development.

It is Archdiocesan policy that every school have a school board, regardless of its model of governance. As part of the Archdiocese's recent School Viability Assessment review, it was noted that several schools do not have their own individual school board. It is recommended that these schools establish and operate a school board as soon as possible. In addition, some schools have school boards, which are non-functioning, and it is recommended that these schools revitalize and activate their school board.

School boards should be diverse and seek to reflect the student population, include community representation, and have persons with expertise related to school needs. A school board development program, managed by the Department of Catholic Schools, is needed to support and provide in-service opportunities for new and existing individual school boards. This program should assist schools with board creation, understanding the roles and responsibilities of board members, the use of committees, and strategic planning. Where Viability Assessment reports made specific recommendations related to school board development, boards are urged to implement these recommendations.

## Priest & Seminarian Formation about Schools

**Recommendation 8:** The Committee recommends that formational development related to the role and mission of Catholic schools and their operation and governance be provided for seminarians and priests. It is recommended that the Archbishop assign pastors who are particularly interested or have expertise in schools as Canonical Representatives.

Regardless of the governance model in operation, it is important that priests in the Archdiocese understand the mission of Catholic schools, how schools relate to parish life and the various missions of the Church, and how they operate and are governed. Learning these lessons should occur as a formal part of seminary formation and ongoing formation of priests. Skills that will assist pastors in serving schools through service as Canonical

Representatives and on school boards (under the new Archdiocesan Collaborative School model) should also be emphasized. It is recommended that the Archbishop assign pastors who are particularly interested or have



Queen Strenuous III, The Catholic Review

# Stewardship



Queen Sweeney III, *The Catholic Review*

## Introduction

Protecting, managing, and expanding the resources of schools in the Archdiocese must be a top priority in order to assure the security and soundness of the Catholic school system for decades to come. These resources – whether they are human, capital or financial – are the subject of this Stewardship section of the Strategic Plan. Below are 18 recommendations related to Stewardship, including the areas of: Catholic School Vitality, Viability and Planning; Parish Support; Finances; Tuition; Government Funding; Advancement; Marketing and Public Relations; Human Resources; Facilities; Technology; and Transportation.

Three key themes play a central role in the Stewardship recommendations offered by the Blue Ribbon Committee. First, the importance of planning is evident throughout this section and nowhere more directly than in the planning for the Archdiocese as a system and in local strategic planning by each school. Institutionalizing ongoing planning will be important to achieving the many recommendations contained in this report.

A second important theme in this section is that revenue generation must be multi-faceted and sustained. There is no one source that the Archdiocese can rely upon to provide the financial support needed. Rather parishes, school families, alumni, the philanthropic community, and the government, as well as the creation of an endowment, are all essential drivers for the generation of revenue. The initiatives contained in other sections of this report, and particularly in the Academic Excellence section, require that these advancement efforts succeed. Certainly, to achieve the Archbishop's goal of making Catholic education more affordable and accessible requires planning and funding.

Third, these Stewardship recommendations, as well as those in the Governance section, call for the centralization of key functions of the school system. Avoiding duplication of efforts, promoting group contracting or purchasing to reduce expenses, and standardizing functions and services, will all contribute to a more efficient operation, better service for schools, and potential cost savings. Striking a careful balance between centralizing those

functions that provide benefits and local control and decision-making that fosters school pride and educational excellence is a delicate responsibility. Careful planning, continuous revenue generation, and efficacious centralization will help build and develop a strong and sustainable school system.

## Catholic School Vitality, Viability and Planning

**Recommendation 1:** The Committee recommends that benchmarks related to key criteria addressing the vitality and viability of schools in the Archdiocese be established and that a protocol be created to support schools that need improvement as well as assist healthy schools in maintaining their vitality and viability.

The Viability Assessment process and the school accreditation process are very helpful tools in performing school assessments; however, because they are intense and complex processes that involve much deliberation, study and time, they are more cumbersome in providing early warnings or quick reviews when schools start to falter.<sup>21</sup> To that end, a more concise set of criteria would be helpful in continuously taking the ever-changing pulse of Catholic schools. Having these criteria, along with a response system for taking action to address warning signs, will place the Archdiocese in a better position to force remediation measures and potentially avert school consolidations or closings.

Certain key factors immediately come to mind that are easy to track; these include: enrollment, budget (deficit/surplus, debt), tuition participation and payment, facility needs, growth or changes in scores, competitor enrollment and trends. Because statistics don't even begin to tell the whole story, these "snapshot" indicators would need to be supplemented annually by assessments of parental involvement, leadership (head of school and school board) and Catholic identity. The goal is not to create extra work for school administrators and boards, but rather to centrally gather a dynamic school profile that is shared with the head of school and local school board, and Archdiocesan School Board and which highlights assets and deficits and clearly gives warnings when attention is needed. If warning signs appear, a process should also be in place to offer support to the school, while notifying all key constituencies about the challenges. Transparency is important and injecting a shared sense of ownership in each school is needed.

The Committee recommends that the Department of Catholic Schools, along with key departments and divisions in Central Services, and input from heads of school, prepare these criteria and the response system. The Superintendent should present this Vitality and Viability Review process and

implementation plan to the Archdiocesan Catholic School Board for its review and approval within six months from the date of this report.

**Recommendation 2:** The Committee recommends that all schools in the Archdiocese prepare a five-year strategic plan.

Proper school planning and accountability will help assure the security of the Catholic school system and the viability of individual schools in the coming decades. The Committee believes that the recently completed Viability Assessments provide schools with important information that will assist them in strategic planning; however, these assessments and the Improvement Plans being developed as part of the assessment process are not sufficient to serve as planning documents to carry schools forward. For example, one aspect of the Viability Assessment, financial viability, was not reviewed in full during these assessments; likewise facility reviews were cursory in many cases. In contrast, a strategic plan that takes into account all aspects of school education and operation is needed. The Committee recommends that these strategic plans be updated annually and submitted to the Department of Catholic Schools along with the annual school budget. The Committee also recommends that the Office of Schools Planning work with schools and provide support and in-service opportunities for administrators and school boards on strategic planning.

**Recommendation 3:** The Committee recommends that the Department of Catholic Schools, in conjunction with the Archdiocesan School Board, conduct a feasibility study to determine the need for a new Catholic high school in Howard, Carroll, or Frederick County.

Currently, there is one high school in Frederick County, and there are no high schools in either Howard or Carroll County. Catholic students from these counties have matriculated into Baltimore City, Baltimore County, Anne Arundel County and Washington County. These students often have very long commutes to and from school and parents requested that a new high school to serve these areas be considered. A thorough study, examining demographics and other factors, to determine whether enrollment could be supported for a new high school in Howard, Carroll or Frederick County, without detracting from existing Catholic high school enrollment, is needed.

<sup>21</sup>In the case of school finances, the Viability Assessment Reports repeatedly state that the visiting team did not review the school's budget, but rather based their recommendations on: discussions with the parish administrator, principal and Board members; and general data provided by the Fiscal Office.

## Parish Support

**Recommendation 4:** The Committee recommends that all parishes financially support Catholic schools.

In his initial charge to the Blue Ribbon Committee, one of Archbishop O'Brien's guiding principles was that he wanted a plan that requires all parishes to support Catholic education. The Archbishop stated:

All of our parishes – including those with no attachment to a school – must be active supporters of Catholic schools. Education, especially of our youngsters, has long been central to the Church's mission of evangelization, and thus it is the responsibility of all Catholic parishes to support the teaching mission of the Church.<sup>22</sup>

The Committee agrees wholeheartedly with this principle. Consultations with pastors of parishes without schools and pastors of parishes with schools provided important insight as to how best to accomplish this directive, including the need for flexibility in how to meet their parish contribution amount.

The Committee recommends that parish contribution amounts be established on a progressive scale tied to parishes' annual offertory collection, such that as a parish's offertory rises, the percent contributed in support of schools also increases. Parishes, of course, would be given credit for the level of Catholic school support they are already providing, including tuition assistance and other support for schools. In addition, funds raised for the parish contribution for schools would not be subject to the Cathedraticum tax.<sup>23</sup>

To facilitate and maximize participation in financial support, each parish might be given a menu of options on how to satisfy its particular contribution. The Archdiocese, in consultation with pastors, should develop a detailed plan specifying the menu options and how the parish support program should be implemented. Parishes could select one or more options from a menu that might include:

- tuition assistance (for parishioner students);
- school subsidy to support operations (for parishes with a school);
- contribution to a specific school (for parishes without a school);
- contribution to a central fund accomplished through:
  - Offertory – portion of regular offertory collection
  - Offertory – designated second collection(s)
  - Use of parish Archbishop Annual Appeal rebate
  - Annual appeal campaign for schools conducted by the parish
  - Contributions to existing parish endowment funds for Catholic schools made through the Catholic Family Foundation
  - Parish fundraisers.

Guidelines should be developed to ensure that the financial support of parishes is distributed equitably among schools in need, so that no one school receives more than its fair share.

## Finances

**Recommendation 5:** The Committee recommends that the Archdiocese create a school financial officer to assist schools in assuring fiscal responsibility, accountability, transparency, and communication.

The recent consolidation of Catholic schools underscored the need for better coordination and review of school financial management, fiscal accountability and planning, transparency, and communication. The Committee recommends that a separate position be created within the Division of Fiscal Services for a school finance officer with responsibilities that include: review and approval of school budgets; administration of tuition-related programs (tuition assistance, tuition management, tuition debt collection); planning regarding school funding by the Archdiocese; reviewing the benefits of increased fiscal standardization with respect to accounting, payroll, audits, and budget preparation; and ongoing coordination with the Department of Catholic Schools. This position would also be charged with implementing the centralization of school financial services and the review and evaluation of bookkeeping staff at Archdiocesan Collaborative Schools. This position would also be responsible for developing in-service opportunities for school financial personnel, as well as heads of schools and School Boards.

## Tuition

**Recommendation 6:** The Committee recommends that a Policy on Catholic School Tuition and Tuition Assistance be established, which is phased in over the next three years and is fully effective by the 2013/2014 school year, that:

- eliminates the following differences in tuition rates:
  - in-parish and out-of-parish tuition rates;
  - Catholic and non-Catholic tuition rates; and
  - family discounts in tuition rates for multiple children.
- combines all mandatory fees (except application and registration fees) and tuition into a single tuition rate per school;
- requires all applicants, applying for any type of Archdiocesan tuition assistance, to use the Archdiocesan application process.

The Committee also recommends that the Archdiocese develop a tuition model that reflects the actual cost of educating a student.

<sup>22</sup>Archbishop Edwin F. O'Brien, *Remarks at the Pastoral Consultation on Catholic Schools*, February 10, 2009.

<sup>23</sup>Cathedraticum is a specified assessment, based on parish income, contributed annually by local parishes to the bishop for the support of the diocesan Church. Through Cathedraticum, each parish helps to support ministries and services which directly benefit the Church at the local level.

Currently, there are a myriad of tuitions and fees being charged by schools in the Archdiocese; some schools charge what is commonly known as in-parish and out-of-parish tuition rates that differ based upon whether a child is a parishioner (at the parish(es) affiliated with a school) or is a non-parishioner. Some schools may charge the in-parish tuition rate to students whose parent has a letter from a pastor showing registration in a parish. In some cases this is limited to certain parishes. Other schools require that families be contributing members of the parish affiliated with the school in order to qualify for in-parish tuition and this is tracked through offertory envelopes. The in- and out-of-parish rates have caused families to leave their parish, if it does not have a school, to join another parish that has a school when their oldest child becomes school age. Some families join a parish specifically to obtain in-parish tuition rates, yet routinely worship at another parish. This lack of uniformity has become divisive at times.

A review of in- and out-of-parish tuition rates evidences the financial incentive for obtaining in-parish tuition. For the 2010-2011 school year, a review of 31 schools that have a difference between in-parish and out-of-parish tuition shows that, for one student, the tuition difference ranges from \$599 up to \$3,551, with an average difference of \$1,273 and a median difference of \$1,100. Some schools maintain further distinctions between Catholics and non-Catholics. Currently, 11 schools do not differentiate between in- or out-of-parish students and have a single tuition rate.

Fees for Catholic schools vary widely and may include: the Archdiocesan student fee, an activity fee, a technology fee, a book fee, a health fee, a testing fee, a supplies fee, a fundraising fee, a parent association fee, a capital maintenance loan/fee, a registration fee, an application fee, and a graduation fee. There are also fees for optional services, such as: transportation, music instruction, and before- and after-care programs. In some cases, fees are bundled into the tuition rate, and, in others, parents pay the tuition plus the fees charged by their particular school.

The Committee wishes to make clear that they are not recommending a single uniform tuition rate, but rather each school would set its tuition rate to reflect its costs of educating students. It is recommended that each parish have one tuition rate and that all fees – except an application fee (to cover processing and testing) and a registration deposit (a non-refundable fee to hold a child's place for the following school year) and fees for optional services (such as before- and afterschool care, transportation, music lessons, etc.) – be bundled into one tuition rate. This would allow families to compare more easily their out-of-pocket costs and create a more level playing field among competing schools. Some schools have already moved to this method of calculating tuition.

Tuition assistance awarded by the Archdiocese is based on financial need and recently the Archdiocese has moved to having an outside vendor provide the review of applications for tuition assistance to determine eligibility. Heads of schools are allowed to provide any additional pertinent information that might affect an assistance award. The Committee agrees that this approach has practical justification in that it has the income eligibility calculated on a standardized basis, yet allows the local school to provide information that only a head of school might have and which might influence the assistance awarded. While this method is currently being used for the Partners in Excellence program, the Committee agrees with the Archdiocese's intent to have all tuition assistance from the Archdiocese utilize the same income eligibility process for any Archdiocesan tuition assistance awards.

Finally, the Committee also recommends that the Archdiocesan Catholic School Board oversee the development of a tuition model that reflects, at a minimum, the true cost of educating a student. The bundling of fees and including them in one tuition rate is a first step at having tuition reflect actual costs. It is also important, however, that parents understand all of the actual costs of providing a Catholic school education. Even if there is offsetting income (from tuition assistance or development contributions), knowing the actual cost of the education is important for planning and budgeting purposes, for parents' appreciation of value given, and for the overall long-term financial stability of Catholic schools.

**Recommendation 7:** The Committee recommends that a study be conducted to evaluate whether preferences should be given in the awarding of unrestricted tuition assistance to financially eligible (1) Catholic applicants and/or (2) children of employees of Archdiocesan institutions.

The Committee believes that the Archdiocese should consider giving Catholic students preference in the awarding of unrestricted Archdiocesan or locally granted tuition assistance, in a manner that does not conflict with the Archdiocese's commitment to ensure education in impoverished areas. Each year, the Archdiocese, as well as local parishes and schools, awards tuition assistance to students in financial need. The Committee believes that a new tuition policy might include a preference for Catholic students in granting tuition assistance awards to allow Catholic students, who otherwise cannot afford it, to attend a Catholic school. A Catholic school education helps deepen the faith life of Catholic students, while as students and later as adults, and endorsing the importance of this mission aspect of Catholic schools by making Catholic school more accessible to Catholics is very important. The Committee acknowledges that there may be specific tuition assistance

programs operated by the Archdiocese that have restricted purposes to support certain students (regardless of religious affiliation) at Catholic schools in the Baltimore metropolitan area or where there is great need and that these restricted gift programs would be unaffected by this policy.

In a similar vein, employees of Archdiocesan institutions, because of lower salaries, are sometimes unable to afford Catholic school education for their children. For employees who demonstrate financial need, the Committee recommends that the Archdiocese consider giving them preference in awarding tuition assistance over other applicants of equal financial eligibility. Employees would be required to comply with all application requirements of the Archdiocesan tuition assistance application process utilized for tuition assistance awards from the Archdiocese. The intent of this preference is to assist employees in return for the financial sacrifice they make in working in Archdiocesan positions that compensate below market value.

Because of the complexity of awarding preferences, the Committee does not recommend that such a policy be adopted until the Archdiocese studies what impact it might have on available resources and how it might operate, particularly when comparing two students who might each be entitled to a different preference. The Committee also wishes to make clear that a preference policy for tuition assistance is different from a tuition remission policy that an individual school might adopt for its own employees.

**Recommendation 8:** The Committee recommends that the Archdiocese explore the potential advantages of the Archdiocese negotiating a single provider agreement, on behalf of schools in the Archdiocese, with both a tuition management service and a tuition debt collection service. In concert with these evaluations, a review of school contracts is recommended to determine differences and the need for standardization.

Currently, schools in the Archdiocese utilize several different tuition management services. These services assist parents in spreading out tuition payments over time and take the burden off schools' administration to record and deposit tuition payments. Determining whether there are cost savings or other advantages from using one service for schools that wish to opt in should be explored.

With respect to tuition debt collection, at least seven schools in the Archdiocese currently utilize a tuition debt collection service to recover overdue tuition. Overall in the Archdiocese, an average of three percent of tuition (or over \$3 million) is attributed to bad "debt." The Committee recommends that the Archdiocese determine whether a more favorable group contract could assist these schools and others in retaining such a service. As

part of this evaluation, the Archdiocese should work with the Mid Atlantic Catholic Schools Consortium, in its capacity to represent several dioceses, to determine its interest in participating in such negotiations.<sup>23</sup>

Finally, the Committee recommends that the Division of Fiscal Services perform a review of enrollment contracts to determine differences and the need for standardization, as these requirements may affect a school's timely ability to collect unpaid tuition. If warranted, a recommended standard enrollment contract should be developed.

## Government Funding

**Recommendation 9:** The Committee recommends that the Department of Catholic Schools assist schools to assure that they are seeking all federal, state and local funds for which they are eligible. Additionally, the Committee recommends that the Archdiocese explore new opportunities for government funding, including assisting schools in accessing funding programs for which Catholic schools are eligible but of which they have not previously availed themselves.

In recent years, the Archdiocese increased its effort to assist schools in applying for government funding for student services and professional development. Those efforts have greatly benefited our students and teachers. Participation in the e-rate program, which provides partial reimbursement for funds spent on technology, also greatly expanded after the Archdiocese provided assistance to schools regarding the application process.<sup>25</sup> However, more could occur to assure that Catholic schools seek and receive all federal, state and local funds for which they are eligible. The Committee recommends that schools should be provided with information and training that will help them to maximize the resources allocated for Catholic schools. Completion of income eligibility forms by families is critical to assuring that schools receive funds they are due and, therefore, should be a prerequisite of Catholic school enrollment. Completion of these forms affects the amount of funding awarded for textbooks, Title I services, and e-rate services.<sup>26</sup>

<sup>23</sup>The Mid-Atlantic Catholic Schools Consortium – composed of the Archdiocese of Baltimore and Washington, and the Dioceses of Arlington, Richmond, Wheeling-Charleston and Wilmington – serves as the joint administrative body addressing challenges shared by Catholic schools in the six dioceses.

<sup>25</sup>The Schools and Libraries Program of the Universal Service Fund, commonly known as "E-Rate," is administered by the Universal Service Administrative Company (USAC) under the direction of the Federal Communications Commission (FCC), and provides discounts to assist most schools and libraries to obtain affordable telecommunications and Internet access. School discounts are calculated based on whether a school is in an urban or rural location and the percent of students eligible for the National School Lunch Program.

<sup>26</sup>Title I of the federal Elementary and Secondary Education Act provides funding to schools and school districts with a high percentage of students from low-income families to provide academic support and learning opportunities to assist low-achieving children.

The Committee recommends that the Department of Catholic Schools maintain at least one staff position devoted to coordinating federal, state and local government funding for Catholic Schools and providing assistance to schools in completing requirements for funding. Feedback from heads of school indicates that assistance from the Department of Catholic Schools regarding accessing government funding is greatly needed and appreciated.

**Recommendation 10:** The Committee recommends that the Archdiocese continue to seek passage of the Building Opportunities for All Students and Teachers (BOAST) in Maryland Tax Credit legislation as one of its highest legislative priorities. The Archdiocese should also continue to support state appropriations for textbooks and other resources for nonpublic schools.

The BOAST Maryland Tax Credit legislation (introduced in the Maryland General Assembly during the last five sessions) provides a state income tax credit to businesses that donate to scholarship organizations for nonpublic school students or innovative educational programs for public school students. The legislation encourages donations to increase scholarships for Catholic and other nonpublic school students and provide grants for nonpublic school teachers. It also provides increased support for public school students through tutoring, mentoring, arts, environmental, and life skills programs. While this legislation was defeated in committee in the House of Delegates in 2010, it passed the full Senate and was endorsed by the Governor. During the 2010 legislative session, the Archdiocese also supported level funding of \$4.4 million for the Nonpublic Student Textbook Program; the full allocation was approved by the General Assembly.

The Committee recommends that the Archbishop and the Archdiocesan Catholic School Board, through its work with the Maryland Catholic Conference, continue its support for these important state legislative initiatives and work with Catholic school parents, teachers, board members, and others to join in this legislative campaign.

## Advancement

**Recommendation 11:** The Committee recommends that the Archdiocese conduct a capital campaign for Catholic schools.

As part of a financial strategy to support Catholic schools, an Archdiocesan-wide capital campaign that would generate revenue for a Catholic School Endowment Fund and support capital needs at Archdiocesan

schools is required. The Committee believes that this strategic plan is the case statement for such a campaign and without a capital campaign for schools, the success of this plan, as well as the viability of Catholic schools, is in jeopardy.

**Recommendation 12:** To provide for a sound financial future for Catholic schools in the Archdiocese, the Committee recommends that the Archdiocese:

- 1) develop an overall long-term capital goal to support both annual and long-term needs of Catholic schools. The Committee also recommends that the Archdiocese expand its Catholic schools endowment to a level where unrestricted distributions from the endowment support the annual needs of its schools. The Committee recommends that the Archdiocesan Catholic School Board develop policies that guide capital planning and endowment distribution;
- 2) employ School Advancement Officers who are specifically charged to assist a group of schools with advancement initiatives. The Committee also recommends that every school in the Archdiocese have an Advancement Committee of its School Board;
- 3) continue its efforts to improve and expand the Partners In Excellence program, which provides tuition assistance for economically disadvantaged students in Baltimore and the metropolitan area;
- 4) explore further the feasibility of a coordinated annual giving program tied to Catholic elementary schools in the Archdiocese;
- 5) explore with neighboring dioceses, whose students attend Catholic schools in the Archdiocese of Baltimore, financial support for those schools and the opportunity for more students to attend Catholic schools from those dioceses; and
- 6) reach out to faith communities of students of other traditions attending Catholic schools in the Archdiocese to request contributions in support of tuition assistance for those students.

The Catholic Community Foundation of the Archdiocese of Baltimore, Inc.<sup>27</sup> currently manages multiple endowment funds that support Catholic education. Some of these funds are associated with certain schools or parishes to support Catholic school education, and some are dedicated to tuition assistance for children attending our inner-city schools. While these are all very worthwhile funds, the annual revenue generated by these funds to support Catholic schools falls short of what is needed to adequately support our schools. In conjunction with the capital campaign and other initiatives, the Committee recommends that the Archdiocese establish a long-term capital goal that will enable the Archdiocese to meet both annual and long term needs. The

expansion of the Catholic school endowment is recommended in order to generate sufficient unrestricted funds to meet the annual needs of Catholic schools. Over the next five years, it is estimated that at least \$3.5 million per year is needed to support Catholic schools. Meeting this goal would allow endowment distribution to replace or reduce financial contributions from individual parishes. The Committee recommends that the Archdiocesan Catholic School Board develop policies to guide this capital planning and endowment distribution.

While most, if not all, high schools currently employ advancement directors, that practice is much less prevalent on the elementary school level. Most elementary schools do not have an advancement director or, if they do, it is on a part-time basis. The Committee acknowledges that the cost of a full-time advancement director may be prohibitive for an elementary school and believes that centralization for elementary school advancement initiatives is preferred. The Committee recommends that the Department of Development employ Catholic School Advancement Officers who serve a group of schools, allowing them to share these services. These officers should have school advancement as their only responsibility and should not be charged with other advancement responsibilities within the Department of Development. The Committee also recommends that every school have an Advancement Committee (of its School Board), if they do not already have one, in order to guide and support the school's advancement efforts.

The 14-year-old Partners In Excellence (PIE) scholarship program provides partial, need-based scholarships for elementary and high school students in Baltimore. Since its inception, the PIE program has distributed over 21,000 tuition assistance scholarships, totaling more than \$21.5 million. For the 2009-2010 school year, PIE awarded scholarships to 947 students, averaging over \$1,000 per student, for a total of \$1,000,000. The Committee recognizes that there is an increased need for tuition assistance and recommends an expanded effort to increase funds raised and distributed through the PIE program.

Currently, the Partners In Excellence program is implementing changes to strengthen the program, including: adding a student/family agreement; developing a tracking plan for all PIE recipients; expanding analysis of student performance; and utilizing an outside service provider to perform income eligibility screening (see discussion above under Tuition). The Committee supports these improvements and recommends that this important scholarship program continue to expand in order to meet the needs of more Catholic school students, consistent with the overall goal of this Strategic Plan.

The Department of Development has begun to explore the creation of an annual giving program for Catholic elementary schools. The Committee

recommends that the feasibility of such a program deserves further exploration by the Department of Development. The Committee notes that Catholic elementary school alumni, in particular, may be one focus of such a program.

For many students attending Catholic schools in the Archdiocese, especially in Western Maryland, Catholic schools in the Archdiocese of Baltimore are the most accessible Catholic schools in the region and therefore serve students residing in multiple states and dioceses. The Archdiocese of Baltimore welcomes these students and is pleased to provide them with a Catholic education. The Committee recommends that the Archdiocese explore with these neighboring dioceses financial support for these schools,



*Queen Sweeney III, The Catholic Review*

as well as the opportunity for under-enrolled schools to provide a Catholic school education for more neighboring dioceses' students, who otherwise might not be able to attend a Catholic school.

To date, there has been little or no interaction with the faith communities of students of other traditions who attend Catholic schools regarding support for tuition assistance for children whose families worship in their faith communities. Currently, Archdiocesan tuition assistance supports many children of other traditions and there is every intention to continue this support. Additional students would be able to attend Catholic schools with support from other faith communities. The Committee recommends that the Department of Development, working with individual schools, reach out to these faith communities to explore support for these students.



## Marketing and Public Relations

**Recommendation 13:** To improve the marketing of Catholic schools, the Committee recommends that:

- 1) the Office of Communications, working with the Department of Catholic Schools, develop, implement and review annually the Archdiocesan school marketing plan;
- 2) each school develop a marketing plan to attract prospective students; and
- 3) the Archbishop ask all pastors, regardless of whether their parish is affiliated with a school or not, to promote annually the benefits and value of a Catholic school education.

A planned and comprehensive approach to school marketing is essential to enrollment and, hence, the viability of Catholic schools. In the past year, the Office of Communications formed a School Marketing Committee that oversaw focus group research and the development of a brand for Catholic schools in the Archdiocese. Following up on these efforts, annual attention is needed to promote, on an Archdiocesan level, the benefits and value of Catholic school education. The Committee recommends that the current Office of Schools Marketing, located in the Division of Schools, move to the Office of Communications and this expanded office support and assist individual schools in developing marketing plans and provide templates, tools, and messages that can be individualized by schools. In-service opportunities for heads of school, school boards and school marketing committees should also be explored. Finally, because the Archdiocese's focus group research found that more and more prospective Catholic school families look online for school information, the Committee also recommends that the Office of Communications assist schools in developing websites that are routinely refreshed with up-to-date information and are marketed as a complete source for school information.

It is also important that each school have its own marketing plan that reflects the Archdiocesan brand and focuses on recruiting new students, as well as current student retention. Marketing efforts should not be limited to Catholic Schools Week and open houses, but rather need to be integrated throughout the school year. Heads of school, who have not already worked with their school board to form a marketing committee, should consider this measure to gather those with marketing expertise to advise and help develop a school marketing plan.

Research indicates that pastors are influential spokesmen for Catholic schools.<sup>28</sup> The Committee recommends that the Archbishop request that

all pastors commit to promoting schools annually. To facilitate this, the Committee recommends that the Office of Communications develop talking points for priests and prepare a list of ways that pastors can promote Catholic schools in the parish setting. Local schools are urged to work with the pastors in providing information and materials in support of these communications.

**Recommendation 14:** The Committee recommends that all schools partner with the Office of Communications in conducting ongoing public relations initiatives about Catholic schools.

Different from the marketing plan (described above), which is aimed primarily at promoting enrollment, a strong public relations initiative led by the Office of Communications is important in aggressively promoting the positive contributions of Catholic schools throughout the Archdiocese. In addition to press releases on Archdiocesan school news, each school should seek ongoing news coverage in local media outlets of its local school events, accomplishments, and human-interest stories.

## Human Resources

**Recommendation 15:** The Committee recommends that schools seek compensation parity with their local public school system, and until they are able to achieve that goal, the Committee recommends that the published Archdiocesan salary scale and benefits package serve as the base compensation package for school employees in all Archdiocesan elementary schools.

Providing employees with competitive compensation packages, at levels paid by the local public school systems, is a goal endorsed by the Committee. Recognizing that this may take time to achieve, the Committee recommends that the published Archdiocesan salary scale and benefits package serve as the base compensation package for elementary school employees.

The Archdiocese publishes a salary scale and benefits package for elementary school employees; however, the current salary scale is published as a recommended guideline and is not always applied. As a matter of justice, it is important that schools provide the base compensation to their faculty and staff according to the established scale and provide the benefit package delineated for each position. Recognizing that occasionally there may be circumstances that justify a departure from the published compensation package, the Committee recommends that heads of schools be required to obtain approval from the Superintendent for exceptions to this policy.

<sup>28</sup>Hamilton, Scott W. *Who Will Save America's Urban Catholic Schools?* Thomas Fordham Institute, 2007, 49. See also: "Strategic Direction and Focus for Catholic Schools" Archdiocese of Denver, May 2009; "The Year of the Catholic School," Archdiocese of Denver.

Since this policy cannot be implemented immediately across the board, the Committee recommends that the Superintendent, working with the Department of Human Resources, establish a plan to phase in compliance with the published Archdiocesan salary scale and benefits package. The Committee also recommends that the Departments of Human Resources and Catholic Schools research regional salary scales and benefits to determine whether variations are needed to account for regional differences.

## Facilities

**Recommendation 16:** The Committee recommends that the Archbishop establish a policy, with respect to the sale or lease of former school buildings, that requires:

- all sales and leases of a school building be approved by the Archbishop;
- the extraordinary transaction costs actually incurred by the Archdiocese in the course of the sale or lease of a school building be reimbursed to the Archdiocese;
- proceeds from the sale of a school building first be used to repay debts incurred by the parish or school to the Archdiocese;
- net proceeds from sales (after the repayment of debt) be divided between the parish that owns the building and the Archdiocese according to a formula that provides for proceeds as follows:
  - ☐ Offertory less than \$300,000 – 60% to parish; 40% to Archdiocesan school endowment fund;
  - ☐ Offertory between \$300,000 - \$399,999 – 55% to parish; 45% to Archdiocesan school endowment fund; or
  - ☐ Offertory over \$400,000 – 50% to parish; 50% to Archdiocesan school endowment fund.
- net proceeds from leases be divided between the parish that leases the building and the Archdiocese according to a formula that provides for proceeds as follows:
  - for parishes or schools with debt to the Archdiocese:
    - ☐ Offertory less than \$300,000 – 40% to parish; 10% to Archdiocesan school endowment fund; 50% for repayment of debt;
    - ☐ Offertory between \$300,000 - \$399,999 – 30% to parish; 10% to Archdiocesan school endowment fund; 60% to Archdiocese for repayment of debt; or
    - ☐ Offertory over \$400,000 – 20% to parish; 10% to Archdiocesan school endowment fund; 70% to Archdiocese for repayment of debt.

- for parishes or schools without debt to Archdiocese:
  - ☐ Offertory less than \$300,000 – 70% to parish; 30% to Archdiocesan school endowment fund;
  - ☐ Offertory between \$300,000 - \$399,999 – 60% to parish; 40% to Archdiocesan school endowment fund; or
  - ☐ Offertory over \$400,000 – 50% to parish; 50% to Archdiocesan school endowment fund.

Over many years, Catholic school buildings were built and maintained using funds from donors and the parish. Recognizing the importance of honoring past donors' intent to support Catholic school education and the financial need of parishes related to school building sales and leases, the Committee recommends the above-described policy for promulgation by the Archbishop as a means of addressing both purposes. The policy establishes a progressive scale for the distribution of proceeds that acknowledges that parishes with different annual offertory levels will bear different obligations concerning proceeds. Prior to any distribution of proceeds, the recommended policy provides for the repayment of debt to the Archdiocese. The Archdiocese would also be reimbursed for any extraordinary transaction costs incurred as a result of its assistance with the transaction. Such costs might include: expenses associated with advertising or marketing the property; title search expenses; preparation of contracts of sale or lease documents; preparation of regulatory applications, registrations, or permits; research on credit worthiness of tenants; and other real estate transaction costs. Finally, the Committee recommends that the Archbishop approve every sale or lease of a school building to assure that new owners or lessees will not be using the building(s) for educational purposes if that would hurt enrollment at nearby Catholic schools.

**Recommendation 17:** The Committee recommends that every school in the Archdiocese develop an annual facilities plan that addresses: ongoing and deferred maintenance, future facility needs, and adequate annual budgeting to cover facility expenses. In addition, the Committee recommends that the Archdiocese have a study conducted every five years to define short- and long-term capital needs of each school.

Schools that fail to keep up with ongoing facility maintenance experience greater long-term costs when deferred maintenance issues arise. Currently, schools in the Archdiocese (as of Fall 2010) have accumulated \$26.4 million worth of deferred maintenance needs. An annual evaluation of facility issues and development of a facilities plan, and a review of this plan by the School

Board, will help assure that schools address immediate needs and plan for future facility requirements.

The Committee also recommends that the Archdiocese contract with an outside firm to conduct a capital needs study every five years. While the cost of these studies would be borne by the individual schools, a central contract for such services would be negotiated by the Archdiocese to gain cost savings from scale.<sup>29</sup> Most schools lack the expertise to adequately assess capital needs. An independent capital needs study, conducted by unbiased experts (who do not have a business interest in performing the needs identified) will allow the head of school and School Board to learn about upcoming capital expenditures and help them plan their capital and/or maintenance budget. The Committee recommends that the Division of Facilities and Real Estate Management assist schools in identifying firms that can perform such analysis. Copies of all annual plans and capital studies also should be shared with the Division of Facilities and Real Estate Management.

## Technology

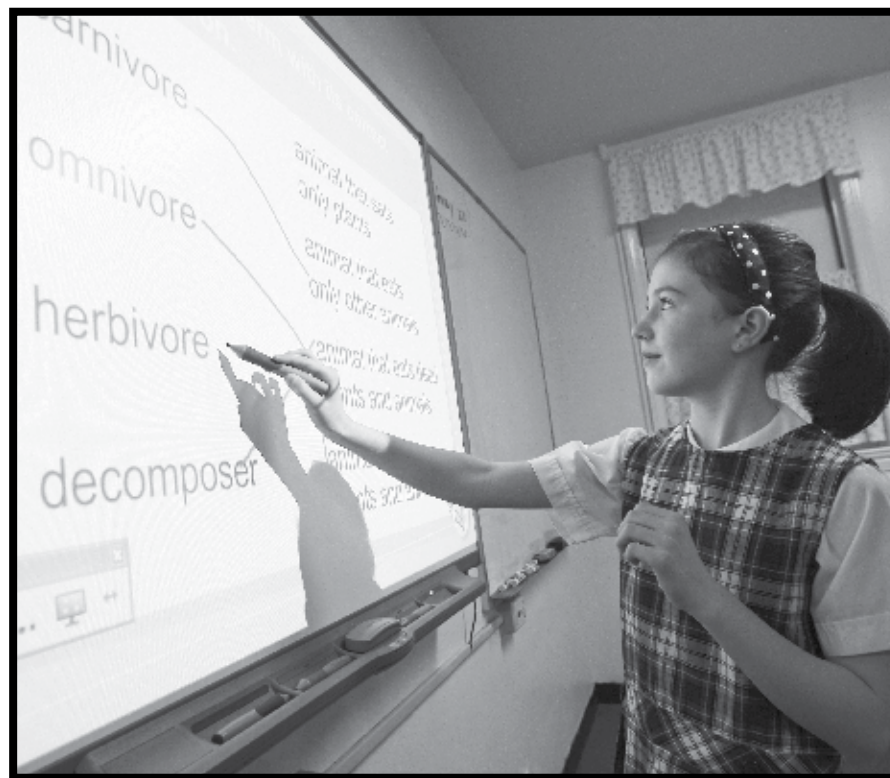
**Recommendation 18:** The Committee recommends that the Department of Catholic Schools and the Division of Information Technology explore centralization of information technology functions and services utilized by elementary schools.

Elementary schools often lack the appropriate personnel and information technology systems to adequately perform information technology (IT)-related functions.<sup>30</sup> Building capacity by centralizing functions used throughout all schools could reduce IT expenses and enhance school performance. While all elementary schools currently have some computer resources, there is a wide disparity in the amount and type of equipment and software available. The Division of Information Technology has initiated an IT inventory related to the school consolidations; however, this study needs to expand to all elementary schools in the Archdiocese. The Committee recommends that the Department of Catholic Schools and the Division of Information Technology explore centralization of information technology functions and services in elementary schools and develop a plan that seeks to lower expenses while providing a standardized level of technology resources in each school.

## Transportation

**Recommendation 19:** The Committee recommends that the Archdiocese study the feasibility of a transportation system for Catholic schools that increases accessibility yet does not encourage student redistribution.

Some high schools in the Archdiocese currently offer limited bus transportation to increase accessibility for students who travel longer distances to school. As part of the Consolidation Plan implementation, the Office of Schools Planning is developing a transportation plan to address the needs of families of elementary school students who wish to remain in Catholic school but for whom transportation is a deterrent to continued enrollment. The Committee is interested in determining whether a broader transportation plan for certain routes can enhance enrollment without encouraging schools to enroll students from other schools' catchment areas.



<sup>29</sup>This arrangement would be similar to fiscal audits paid for by schools but contracted for by the Archdiocese.

<sup>30</sup>Technology issues, as they relate to curriculum and instruction, are also discussed above in the Academic Excellence section of this Strategic Plan.

# Appendix A



## Schools in the Archdiocese of Baltimore

### *Archdiocese Elementary Schools*

Archbishop Borders Elementary School  
Bishop Walsh School (*Pre K - grade 12*)  
Cardinal Shehan School  
Immaculate Conception School  
Immaculate Heart of Mary School  
John Paul Regional Catholic School  
Msgr. Slade Catholic School  
Our Lady of Grace School  
Our Lady of Hope - St. Luke School  
Our Lady of Mount Carmel Elementary School  
Our Lady of Perpetual Help School  
Our Lady of Victory School  
Queen of Peace School: Ss. James & John  
Resurrection/St. Paul School  
Sacred Heart School (Glyndon)  
School of the Cathedral of Mary Our Queen  
School of the Incarnation  
St. Agnes School  
St. Ambrose Catholic School  
St. Augustine School  
St. Casimir Catholic School  
St. Clement Mary Hofbauer School  
St. Francis of Assisi School  
St. Jane Frances School  
St. Joan of Arc School  
St. John Regional Catholic School (Frederick)  
St. John School (Westminster)  
St. John the Evangelist School (Hydes)  
St. John the Evangelist School (Severna Park)  
St. Joseph School (Fullerton)  
St. Joseph School (Texas - Cockeysville)  
St. Louis School  
St. Margaret School  
St. Mark School  
St. Mary Catholic School (Hagerstown)

St. Mary's School (Annapolis)  
 St. Michael the Archangel School  
 St. Philip Neri School  
 St. Pius X School  
 St. Stephen School  
 St. Thomas Aquinas School  
 St. Ursula School

***Independent Elementary & Middle Schools***

The Visitation Academy  
 Mother Seton Academy  
 Mother Seton School  
 Sisters Academy of Baltimore  
 St. Ignatius Loyola Academy  
 St. Thomas More Academy  
 Trinity School  
 Woodmont Academy

***Archdiocesan High Schools***

Archbishop Curley High School  
 Archbishop Spalding High School  
 Bishop Walsh School  
 St. Maria Goretti High School  
 The Seton Keough High School

***Private High Schools***

Calvert Hall College High School  
 The Catholic High School of Baltimore  
 Cristo Rey Jesuit High School  
 St. Frances Academy  
 Institute of Notre Dame  
 The John Carroll School  
 Saint John's Catholic Prep  
 Loyola Blakefield  
 Maryvale Preparatory School  
 Mercy High School  
 Mount De Sales Academy  
 Mount Saint Joseph High School  
 Notre Dame Preparatory School

***Parish High Schools***

Our Lady of Mt. Carmel High School  
 St. Mary's High School

***Special Education School***

St. Elizabeth School

**Schools Closed between 2000 and 2010**

Ascension School.....	Halethorpe .....	2010
Bishop John Neumann School .....	Highlandtown .....	2005
Catholic Community School of South Baltimore.....	Federal Hill.....	2009
Father Charles A. Hall Catholic School .....	Druid Heights .....	2010
Holy Family School.....	Randallstown.....	2010
Holy Spirit School .....	Waverly.....	2004
Mother Mary Lange Catholic School .....	Frankford.....	2010
New All Saints Parish School .....	Dorchester.....	2006
Our Lady of Fatima School .....	Graceland Park .....	2010
Our Lady Queen of Peace School.....	Middle River .....	2007
Queen of Peace Cluster: St. Katharine School.....	E. Baltimore .....	2010
Sacred Heart of Mary School .....	Dundalk.....	2010
Shrine of the Little Flower School .....	Belair-Edison.....	2005
Shrine of the Sacred Heart School.....	Mt. Washington.....	2010
St. Alphonsus/Basilica School.....	Mt. Vernon.....	2002
St. Anthony of Padua School .....	Frankford.....	2005
St. Bernardine Catholic School .....	Irvington.....	2010
St. Clare School .....	Essex.....	2010
St. Clement School.....	Lansdowne .....	2003
St. Dominic School .....	Hamilton.....	2006
St. Elizabeth of Hungary School.....	Patterson Park.....	2002
St. John Neumann School .....	Cumberland .....	2002
St. Mary School .....	Govans .....	2009
St. Michael School .....	Frostburg .....	2009
St. Peter School .....	Westernport.....	2002
St. Rita School.....	Dundalk.....	2006
St. Rose of Lima School.....	Brooklyn Park.....	2010
St. William of York School .....	Ten Hills .....	2010

***Archdiocesan High Schools***

Cardinal Gibbons High School.....	S.W. Baltimore .....	2010
Our Lady of the Rosary High School .....	Fells Point.....	2004

***Parish High Schools***

Towson Catholic High School .....	Towson .....	2009
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# Appendix B



Queen Sheeney III, *The Catholic Review*

## Consultations

Over the past year the Blue Ribbon Committee and the staff of the Office of Schools Planning consulted with many individuals to learn more about various aspects of education and Catholic schools. These individuals included:

Dr. Andrés Alonso, Baltimore City Public School System

Leslie Andrathy, Archdiocese of Baltimore

Ed Anthony, City of Baltimore

Matt Anthony, Archdiocese of Baltimore

Carol Augustine, Archdiocese of Baltimore

Diane Barr, Archdiocese of Baltimore

†Archbishop William D. Borders, Archbishop Emeritus of Baltimore

Fr. Timothy Brown, S.J., Loyola University

Sean Caine, Archdiocese of Baltimore

Bob Clancy, Archdiocese of Baltimore

Ashley Conley, Archdiocese of Baltimore

Vincent Connelly, Connelly & Associates Fundraising

Jacquelyn D. Cornish, City of Baltimore

Brian Crimmins, Changing Our World, Inc.

Fran Critzman, on behalf of the Archdiocesan Board of Advisors to the Superintendent

Kathleen Driscoll, Campaign for Catholic Schools, Boston, MA

Dr. Sharon Dubble, Loyola University

Dr. Barbara Edmondson, School of the Incarnation

Dr. Mickey Fenzel, Loyola University

Kathleen Filippelli, Fr. Charles Hall Catholic School

Msgr. Thomas Foley, Archdiocese of Boston

Henry Fortier, Archdiocese of Baltimore

Dr. Debra M. Franklin, College of Notre Dame

Sr. Connie Gilder, SSJ, Archdiocese of Baltimore

William Glover, Archdiocese of Baltimore

Dr. Nancy Grasmick, Maryland State Department of Education

Arthur Gray, City of Baltimore

Mark E. Greenberg, Catholic Charities of Baltimore

Dr. Joe Hairston, Baltimore County Public Schools

Jennifer Hammand, Archdiocese of Baltimore

Brother Lawrence W. Harvey, CFX, Xaverian Brothers

Miki Hill, Homeschooling parent

Dr. Patricia Hoge, Connections Academy

Katherine Hoskins, Gallagher, Evelius & Jones

Dr. Mary Ellen Hrutka, Mid-Atlantic Catholic Schools Consortium

Mary Jo Hutson, Archdiocese of Baltimore

Fr. Bruce Jarboe, Holy Trinity parish and Msgr. Slade Catholic School

Doug Johnson, Archdiocese of Baltimore

David Kinkopf, Gallagher, Evelius & Jones

Fr. Richard Lawrence, St. Vincent De Paul parish and Queen of Peace Schools

Most Reverend Denis J. Madden, Archdiocese of Baltimore

Patrick Madden, Archdiocese of Baltimore

Mary Catherine Marshall, Archbishop Borders School

John Matera, Archdiocese of Baltimore

William McCarthy, Catholic Charities of Baltimore

Nolan McCoy, Archdiocese of Baltimore

Janet McDonell, Loyola University

Michael McGuire, Shaw & Rosenthal LLP

Maureen McMahon, Anne Arundel County Public Schools

Michelly Merrick, Archdiocese of Baltimore

Fr. Kevin Milton, Our Lady of Fatima

Elizabeth C. Monahan, Mount St. Mary's University

Darlene Morrison, Cromwell Valley Elementary School

Karen Murphy, on behalf of the Elementary School Principals Association

Sr. Rosalie Murphy, SND, Archdiocese of Baltimore  
Dr. Peter Murrell, Loyola University

Dr. Barbara Nazelrod, The Catholic High School of Baltimore

Mary Anne O'Donnell, Catholic Charities of Baltimore

David Owens, Archdiocese of Baltimore

Dr. Barbara Martin Palmer, Mount St. Mary's University

Jay Parker, Archdiocese of Baltimore

Elizabeth Phelan, formerly of St. Mary of the Assumption School

Ryan Potter, Gallagher, Evelius & Jones

Mary Jo Puglisi, PRIDE Program

Dr. Brian Ray, National Home Education Research Institute

Dr. David B. Rehm, Mount St. Mary's University

Matt Richardson, Private School Aid Service

Carol Goldbeck Ripken, Archdiocese of Baltimore

Julia Rogers, Archdiocese of Baltimore

Msgr. Steven P. Rohlf, Mount St. Mary's Seminary

Most Reverend Mitchell T. Rozanski, Archdiocese of Baltimore

Mary Ellen Russell, Maryland Catholic Conference

Dr. Skipp Sanders, Archdiocese of Baltimore

Terrence Sawyer, Loyola University

Marce Scarbrough, Archdiocese of Baltimore

Dr. Mary Pat Seurkamp, College of Notre Dame

Sr. Sharon Slear, SSND, College of Notre Dame

Steve Smalley, Northrop Grumman Corporation

Valerie Smitheman-Brown, Kennedy Krieger Institute

Sr. Vicki Staub, SSJ, formerly of Catholic Community School

Thomas Sweeney, SGR Group

Fr. Ross Syracuse, OFM Conv., St. Casimir Church

Dr. Ronald J. Valenti, Archdiocese of Baltimore

Pamela Walters, Sacred Heart of Mary School

Dr. Barney Wilson, Baltimore Polytechnic Institute

Timothy J. Winter, Northrop Grumman Corporation

Msgr. Richard Woy, Archdiocese of Baltimore



# Appendix C



## **Archdiocese of Baltimore Archdiocesan Catholic School Board**

### **BYLAWS**

#### **Article I Name**

The name of this body shall be the Archdiocesan Catholic School Board (hereinafter, the “Board”).

#### **Article II Purpose of Board**

The purpose of the Board is to help assure the long term viability of Catholic schools in the Archdiocese of Baltimore (the “Archdiocese”) and advance the quality of Catholic education for students in the Archdiocese by advising the Archbishop of Baltimore (the “Archbishop”) on all aspects of administering Catholic elementary and secondary schools in an Archdiocesan school system.

#### **Article III Responsibilities**

The following authority is delegated to the Board, subject to the ultimate canonical rights and duties of the Archbishop:

- To advance the mission of Catholic schools in the Archdiocese;
- To monitor the implementation of the strategic plan and oversee ongoing strategic planning for Catholic schools in the Archdiocese;
- To monitor the implementation of the Archdiocesan Collaborative School model and recommend adjustments;
- To recommend policies for the Archdiocesan school system to the Archbishop and Superintendent;
- To advise the Archbishop and Superintendent concerning advancement, finance, facilities, and leadership matters affecting Catholic schools; and
- To develop and strengthen the capacity of local school boards.

## **Article IV Membership**

The Archbishop, Auxiliary Bishops, Vicar General, and Superintendent of Catholic Schools of the Archdiocese shall be non-voting members of the Board *ex officio*. Other members of the Board shall be appointed initially by the Archbishop for one-year terms. Thereafter, the Board will elect its own members, subject to the right of the Archbishop to remove a Board member with or without cause.

Board membership should include representatives of Catholic colleges and universities, pastors, teachers, parents, elementary and secondary school principals, and philanthropic, business and community leaders.

The Archbishop shall serve as Chairperson of the Board *ex officio*. A Vice Chair of the Board, who is a lay representative, shall be appointed initially by the Archbishop for a one year term. Thereafter, the Board shall elect annually a Vice Chair from among the members of the Board, subject to the right of the Archbishop to remove the Vice Chair with or without cause.

## **Article V Meetings**

Regular meetings of the Board shall be held at least four times annually at a place and time determined by the Archbishop.

Special meetings of the Board for any purpose may be called at any time by the Archbishop, an Auxiliary Bishop, or the Vicar General.

The Archbishop shall chair all meetings of the Board. If the Archbishop is unavailable, the Vice Chair or an *ex officio* Board member designated by the Archbishop will chair the meeting in his absence.

The Board shall keep minutes of its meetings and distribute the minutes to all Board members.

## **Article VI Amendment to Bylaws**

These Bylaws may be amended by the Archbishop, or by the Board subject to the approval of the Archbishop.

**For approval by** Archbishop Edwin O'Brien

# Appendix D



Queen Sweeney III, *The Catholic Review*

## Archdiocesan Collaborative School Model

### Introduction

In the Blue Ribbon Committee's governance deliberations, certain themes emerged repeatedly – among them, the constant dynamic between local and central authority in the management of a school system and in its schools. After reviewing the practices of various school systems and reflecting upon the challenges faced in the Archdiocese, the Committee concluded that the principle of *subsidiarity* was a unifying principle around which to organize its governance proposals. Although most fully developed by the Church in the context of social justice, subsidiarity has a correlative instructional application in this context.

The principle was first raised by Pope Leo XIII in his encyclical *Rerum Novarum* (1891) and was more fully developed by Pope Pius XI in *Quadragesimo anno* (1931). At heart, it holds that decisions of governance are best left to the most capable level of government closest to those affected by the decision. It was put forward as a response to developing socialist and totalitarian governments that sought to usurp the freedom of individuals and families.

As the principle developed – and, most specifically, as concern for the challenges of *laissez faire* capitalism increased – later authorities began to emphasize the supporting role that higher levels of government could provide to lower levels, as well as to individuals and families directly. Indeed, the word *subsidiarity* comes from the Latin root, *subsidium*, which means “to support.”

In the context of school administration, the Committee interprets the principle to mean that, to the greatest extent possible, particular and ongoing decisions regarding school operations should be made at the local level, while individual schools and school administration should be supported as much as possible by the resources most readily available at higher levels (such as finances and expertise). In this way, the Committee supports drawing upon

the strengths of both the local and central authorities and endeavors to build a school system that promotes the common good of our Catholic school educators and students.

To that end, we propose an Archdiocesan Collaborative model, which seeks, to the greatest extent possible, to muster the greatest resources available to the Archdiocese and to channel them in support of local schools and their students, families, faculties, and staffs. Thus, where use of Archdiocesan resources (e.g. specific educational or administrative expertise), or the pooling of such resources, would support or inure to the benefit of an individual school, those resources are utilized. In other cases, local decisions (by the local school board or principal) appropriately remain in the jurisdiction of the local leaders.

### **The Archdiocesan Collaborative School Model**

The Archdiocesan Collaborative School (ACS) model is proposed as a hybrid model that combines the benefits of centralization and governance present in an Archdiocesan model while retaining some of the benefits experienced in the parish model, such as community involvement and sense of ownership and decision making at the local level.

Centralized services such as accounting, tuition collection, payroll, advancement, and marketing would be provided by the Archdiocese. The President (in the case of the high school or pre-K- 12 schools) or Principal (in the case of pre-K- 8 schools) would be selected, mentored, evaluated and dismissed by the Superintendent, with advice and input from the School Board.

The School Board would be comprised of individuals with strong ties to the local community. A Canonical Representative (local pastor), appointed by the Archbishop, would represent the interests of the parish communities in the area, coordinate priests to provide worship services at the school, and serve on the School Board.

The following are the key components of the new Archdiocesan Collaborative model.

#### ***Archbishop:***

- Holds reserved powers that he may delegate to the Superintendent.
- Serves as Chair of the Archdiocesan Catholic School Board.
- Appoints the inaugural members of the Archdiocesan Catholic School Board.

- Appoints the inaugural members of the school boards of Archdiocesan Collaborative Schools.
- Approves the appointment of all School Board Chairs of Archdiocesan Collaborative Schools.

#### ***Archdiocesan Catholic School Board:***

- Is advisory to the Archbishop and Superintendent.
- Recommends policies that are consistent with the mission of Catholic schools in the Archdiocese of Baltimore.
- Monitors the implementation of the Archdiocesan Collaborative School model and recommends improvements, as well as monitoring the other existing models of governance.
- Monitors the implementation and updates of the strategic plan and oversees ongoing strategic planning for Catholic schools in the Archdiocese.
- Recommends policy to the Archbishop and Superintendent for approval, where needed.
- Provides strategic direction and advice concerning advancement, finance, facilities, and leadership matters affecting Catholic schools; and
- Works to develop and strengthen the capacity of local school boards.

#### ***Superintendent of Catholic Schools:***

- Reports to the Archbishop.
- Serves as Superintendent of Catholic Schools and the Executive Director of the Department of Catholic Schools.
- Recommends policies that are consistent with the mission of Catholic schools in the Archdiocese of Baltimore.
- Hires, dismisses, and supervises the Presidents and Principals of all Archdiocesan Collaborative Schools.
- Attends (or designates someone to attend) at least one Board meeting per year for each of the Archdiocesan Collaborative Schools.
- Hires and dismisses all Department of Catholic School personnel.
- Recommends policy to the Archbishop and the Archdiocesan Catholic School Board and executes all policy implementation.
- Evaluates schools according to designated accreditation protocols.
- Serves as an *ex officio* non-voting member of the Archdiocesan Catholic School Board.

#### ***President (or Principal in the case of school that does not have a President):***

- Carries out the mission of the school.
- Spiritual leader of the school.

- Reports to the Superintendent of Catholic Schools.
- Works with Archdiocesan School Advancement Director on advancement and fundraising efforts.
- Works with Archdiocesan School Marketing Director on marketing and public relations efforts.
- Works with Archdiocesan School Fiscal Director on budget and accounting matters.
- Oversees the management of all school facilities.
- Serves as an *ex officio* non-voting member of the school board.

***Principal (in the case of school that has a President):***

- Assists the President in ensuring the mission of the school is carried out.
- Instructional leader of the school.
- Reports to the President of the School.
- Oversees all curriculum and instructional issues.
- Oversees all professional development of faculty and staff.
- Hires and dismisses faculty and staff.
- Serves as an *ex officio* non-voting member of the school board.

***Canonical Representative:***

- Appointed by the Archbishop. Each school has its own Canonical Representative.
- Sits on the school board as a voting *ex officio* member. Represents the interests of local parishes at school board meetings and in meetings with the President or Principal.
- The Canonical Representative shall not serve as the Chair of the School Board.
- Consults regularly with President/Principal about matters of local interest, particularly those affecting local parish matters.
- Organizes priests to serve as affiliated Priest Chaplains who are involved in the sacramental, spiritual and religious instructional life of the school.
- Attends school functions (graduations, fundraisers, other celebrations).
- Works with local pastors to support the school by utilizing parish publications, electronic communications and personal requests from the pulpit to inform parishioners and seek their support.

***Affiliated Priest Chaplains:***

- Celebrate Mass and other sacraments (e.g., reconciliation), assist at prayer and other devotional services, and assist with religion class instruction when invited by the Principal or religion teacher.

- Work with Canonical Representative and other Priest Chaplains at the Archdiocesan Collaborative School to share worship services at the school.
- If serving at a parish, encourages parishioners to send their children to the school and to support the school.

***School Board:***

- The inaugural School Board members will be appointed by the Archbishop. Thereafter, the Board is self-perpetuating, with members being voted upon by the Board, subject to the Archbishop's reserved powers. Board members will include representatives of the local parish(es), educational, philanthropic, business, and community leaders knowledgeable in a wide range of fields.
- The Board shall have at least 10 but no more than 17 members.
- No more than two Board members may be parents of current students attending the school. One parent Board member must be a representative from the Home and School Association.
- Canonical Representative serves as voting *ex officio* member; his term runs with his appointment by the Archbishop. He may be removed by the Archbishop for cause.
- Is deliberative, subject to the Archbishop's reserved powers.
- Recommends policies and practices that are consistent with the school's mission.
- Establishes school policies and procedures regarding finances, advancement, marketing, building and grounds, and other areas of corporate management, with advice from the Superintendent and in accord with Archdiocesan policies.
- Develops and oversees implementation of a school strategic plan.
- Assists the Superintendent in the evaluation of the head of school by completing an annual performance evaluation.
- Meets a minimum of four times per year.
- Participates in regular professional development in areas important to the life of the school, including Board development and Catholic identity.
- Members serve three-year terms and may serve two consecutive terms.
- Elect a Chair, Vice Chair, Secretary and Treasurer.
- Form an Executive Committee, committees with responsibilities for finances, advancement, membership, academics, facilities and strategic planning, and other committees as needed.

***Parishes:***

- Invite a School Board Member (from any school) to address parishioners at Mass one weekend per year about sending their children to Catholic school, supporting local Catholic school fundraisers, and making legacy gifts to Catholic schools.
- Include on the Pastoral Council of the local parish(es) an *ex officio* representative from the Archdiocesan Collaborative School or its School Board.

***School Finances:***

- Each school maintains its own financial responsibility including having its own:
  - assets
  - operating budget
  - internal audit
- Each school shares services and costs, including bookkeeping and accounting, centralized payroll, tuition collection, with others in the Archdiocesan Collaborative School model.

***Facilities:***

- Each school that is on parish property must have a use agreement with the parish delineating the parameters of the mutual use of the school facilities by the school and the parish.

***Program Implementation:***

Beginning in July 2010, the Archdiocese will initiate implementation of the new Archdiocesan Collaborative School (ACS) model in approximately ten to twelve schools. During the first year, the Archdiocese will develop procedures and work with principals and boards to refine the model. The Committee recommends that, in subsequent years, all elementary schools move to this model.

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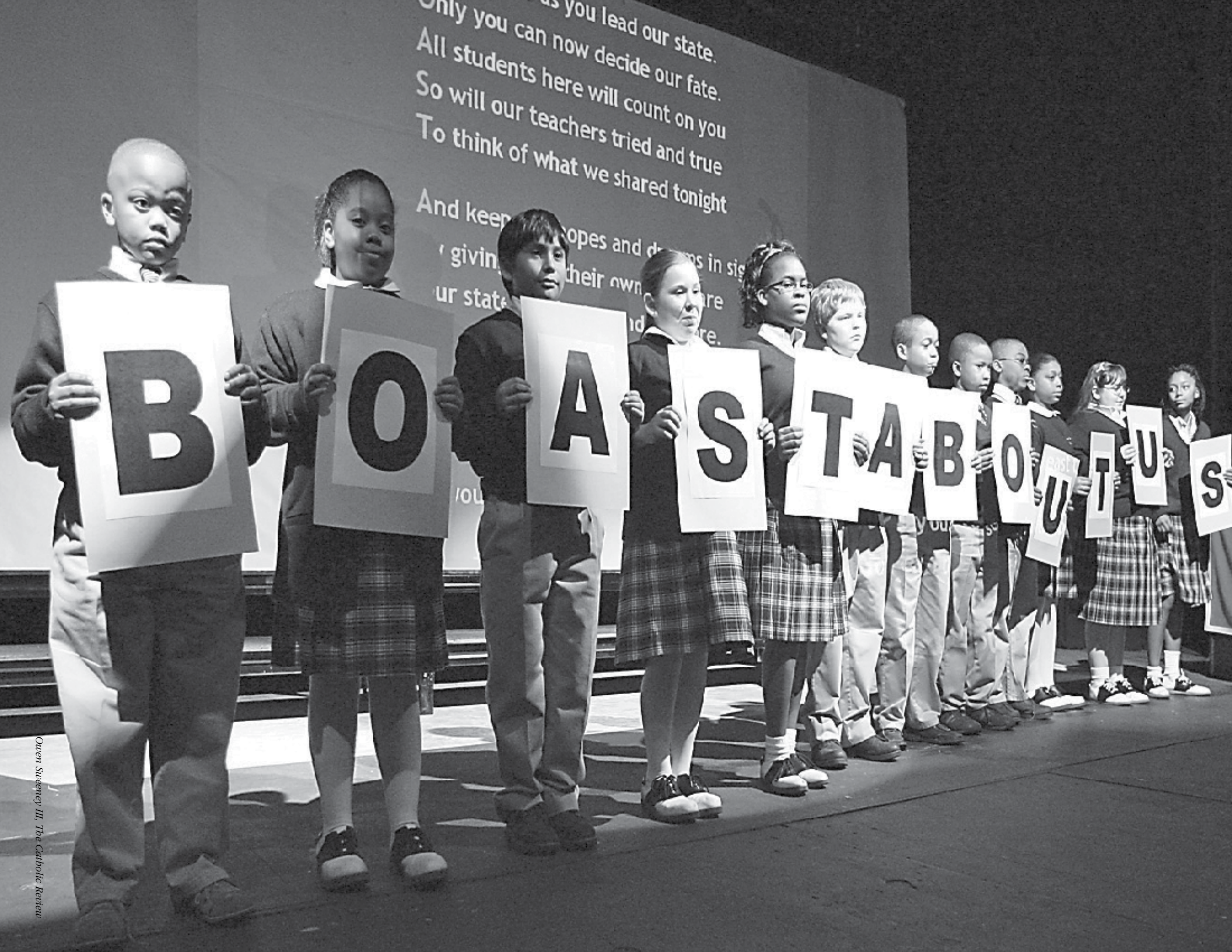
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