

SAINT XAVIER HIGH SCHOOL

STRATEGIC PLAN

JULY, 2016 – JUNE, 2021



Xaverian Brothers

Sponsored Schools

THE STRATEGIC PLANNING PROCESS

Saint Xavier High School utilizes a formal strategic planning process that engages a broad spectrum of stakeholders in establishing goals and objectives that will guide the school's growth and improvement over the next five years. Fortitude from the Board and school leadership in keeping the identified strategic aspirations front and center in decision-making and an annual Board reporting process ensuring accountability for progress on measurable objectives promote the plan as an active, living document. In this light, the strategic plan propels the continuous improvement and mission advancement required as part of the Southern Association of Independent Schools' accreditation process.

During the summer of 2015, Mr. Cal Stoney and Dr. Jason McNeal of Gonser Gerber Advancement Consultants were retained to facilitate the planning process. Following extensive preparation with school leadership, the SOAR Process was adopted to identify strengths, opportunities, aspirations and results that will position Saint Xavier High School as the preeminent Catholic school for young men in the local area while acknowledging cultural and demographic realities that challenge the school's mission and position within the community. Under the leadership of the consultants and Strategic Planning Co-Chairs, Mrs. Teresa Riggs and Mr. Kevin Smith, a timeline was developed to engage community representatives in the process and to develop a comprehensive plan for presentation to the Board of Directors for adoption during the Board's April, 2016 meeting. Specifically, the following steps and components encouraged broad involvement, careful data-collection, study and discussion that yielded a plan that will push the school's efforts, challenge resources and promote mission advancement during the five years ahead:

- An intensive session with the Board of Directors and ten additional focus groups, involving approximately 200 participants, completed the SOAR process, providing much data for review, desired outcomes and confidence in the future of Saint Xavier's mission.
- A Strategic Planning Core Committee was formed to guide the rest of the process and to analyze the data from the focus groups.
- Following much analysis, discussion and editing sessions, five aspirational statements were adopted by the Core Committee.
- An Aspiration Team, involving Core Committee members, school leadership, faculty and community members, was formed for each of the five aspirational statements:
 - Team 1 - School and Student Programs

- Team 2 - Diversity
- Team 3 - Branding and Enrollment Management
- Team 4 - Finances
- Team 5 - Facilities and Technology
- The five Aspiration Teams developed goals and objectives for each aspirational statement.

The plan that follows delineates the five broad aspirational statements and the specific goals and objectives that will foster major progress toward each aspiration. Supporting data is provided in the appendices that follow the five major initiatives.

MISSION STATEMENT

Saint Xavier High School, a Catholic college preparatory school sponsored by the Xaverian Brothers since 1864, engages young men in rigorous academic programs and extracurricular activities that foster respect, honor and service to God's world.

VISION

To pursue excellence in all endeavors.

EDUCATIONAL PHILOSOPHY

Saint Xavier High School, faithful to its Xaverian heritage, strives to build a Catholic community of faith that calls young men to embrace Gospel values and prepares them to share in the life of God through lives of generous service to the world. We seek to develop the gifts and talents of each student through holistic efforts based in rigorous academics, the arts, competitive athletics, intramurals, extracurricular activities and vibrant campus ministry programs.

As a college preparatory school, St. X admits students of diverse faiths and abilities who demonstrate potential for completing our four-year, liberal arts and sciences curriculum and who desire a Catholic education. Our programs of study challenge students to grow intellectually and to think critically, welcoming students with different learning styles and mild learning differences. Exceptional instruction, guidance and coaching build enduring relationships while helping students to develop leadership skills, self-discipline and the attitudes essential for higher educational success and for becoming confident, capable and responsible stewards in a global society.

SCHOOL AND STUDENT PROGRAMS

SUBCOMMITTEE MEMBERS: Dan Able, Co-Chair, Theresa Burch, Co-Chair, Aaron Abell, Mary Ann Bowman, Pat Chitwood, Peter DeZarn, Nathan Durbin, Frank Espinosa, Frank Hulsman, Ben Jankowski, Dan McCue, Mark Metzger, Samuel Picota, Rosanna Vessels, Sarah Watson, Shu-Wei Wu, Kyle Yochum

ASPIRATION 1: We aspire to strengthen our uniquely Catholic, whole-student educational experience through formative spiritual opportunities; rigorous academic curricula; and robust, competitive athletic and extracurricular programs.

GOAL 1: Saint Xavier will strengthen its Catholic, Xaverian nature through formal programming and enhancements to school culture and environment.

OBJECTIVES:

1. Continue to review and update, as needed, the Theology curriculum in coordination with the Archdiocese of Louisville and XBSS. (ongoing)
2. Maintain and adjust abundant Campus Ministry programs that spark spiritual growth, promote participation in the Church and provide opportunities to serve. (2016 and ongoing)
3. Review and enhance the religious symbols and art on campus that draw attention to St. X's Catholic and Xaverian roots. (ongoing; add to collection by 2021)

GOAL 2: Saint Xavier will ensure that out-of-class assignments are both relevant in scope and reasonable in quantity at all academic levels.

OBJECTIVES:

1. Survey students, parents and faculty regarding current types and quantity of out-of-class assignments. (2016-2017 school year)
2. Research best practices related to out-of-class assignments, looking at case studies of other schools and current research. (2016-2017 school year)
3. Review and adjust current out-of-class assignment policy, as needed, based on the results of Objectives 1 and 2, making sure St. X's out-of-class assignment policy is level-appropriate,

extends learning, reinforces what is taught in the classroom, and furthers the learning objectives of the course. (Fall, 2018)

GOAL 3: Saint Xavier will prepare students for college and career-readiness through the incorporation of 21st-century skills in the curriculum to meet the school's mission to develop men of character.

OBJECTIVES:

1. Identify the skills that likely will be needed for success in college and the modern workplace. (2016-2017 school year)
2. Audit existing curriculum to identify where the skills identified in Objective 1 are already being taught. (2016-2017 school year)
3. Identify and implement new ways in which 21st-century skills can be incorporated into the curriculum, with an eye towards cross-curricular collaboration. (Fall, 2017 and ongoing)

GOAL 4: Saint Xavier will utilize existing Guidance Department personnel and resources to best meet the college and career readiness and emotional needs of students.

OBJECTIVES:

1. Research and examine current guidance counseling models for college and career readiness. Identify best practices. (2016-2017 school year)
2. Use the results of Objective 1 and take into account needs of our students to consider the best organizational model for the Guidance Department. (Design organizational model in 2018-2019 school year; implementation Fall, 2019)
3. Develop and implement grade-level-appropriate Career Day programs for students. Investigate existing career research projects assigned by individual teachers. (Research and design of program in 2016-2017 school year; implementation in 2017-2018)
4. Explore shadow and internship opportunities for interested students. Involve and develop shadow and internship opportunities in the community using relationships with alumni. (Program exploration in 2016-2017 school year; implementation in 2017-2018 school year)

GOAL 5: Saint Xavier will provide outstanding opportunities for professional growth for teachers and coaches that support the academic, spiritual and extracurricular goals of the school.

OBJECTIVES:

1. Assess professional development offerings and requirements from a growth mindset to evaluate how they can better engage and meet the needs of teachers. (Fall, 2016 and ongoing)
2. Explore opportunities to utilize 21st-century skills and strategies in professional development sessions and model them in action. (Fall, 2016 and ongoing)
3. Explore a more thorough, accurate and meaningful evaluation and professional development process for all St. X coaches to develop the skills needed to provide the best development of student-athletes. (Research and program development in 2017-2018 school year; implementation in Fall, 2018)

GOAL 6: Saint Xavier will conduct a feasibility study for a middle school or junior high school affiliated with the high school.

OBJECTIVES:

1. Research both models (middle and junior high schools), including investigating local, regional and network schools that now have middle or junior high school programs. (Fall, 2016 through Spring, 2018)
2. Based on results of Objective 1, determine the feasibility, if any, of creating a middle or junior high school affiliated with St. X. (Spring, 2018)

GOAL 7: Saint Xavier will create a modular, adaptive and collaborative space in the current Callahan Media Center (aka IMC) building to meet the needs of 21st-century learners.

OBJECTIVES:

1. Research recent library renovations in the region and what a contemporary, collaborative learning space looks like. (Summer and Fall, 2016)
2. Evaluate how teachers and students currently use the IMC and how they would like to utilize the space in the future. (2016-2017)

GOAL 8: Saint Xavier will create a Character Education Program, aligned with the philosophy and goals of Xaverian schools, for students in athletic programs.

OBJECTIVES:

1. Explore current programs at other high schools and colleges. (2016-2017 school year)
2. Determine which program, if any, best fits the mission of St. X and the needs of its student-athletes, and implement that program. (2017-2018 school year)

DIVERSITY

SUBCOMMITTEE MEMBERS: Mary Ashlock, Co-Chair, David Johnson, Co-Chair, Lynn Bynum, Margie Charasika, Frank Espinosa, Neil Hulsewede, Paige Janes, Mike Lush, Rick Nord, Matt Reed, Efren Quirino, Perry Sangalli, Siobhan Smith, Sorin Spohn, Brad Sutton

ASPIRATION 2: We aspire to become a more diverse learning community – students, faculty and staff – dedicated to enhancing the school’s culture of excellence.

GOAL 1: Saint Xavier will assess and expand, as needed, changes to educational and program needs in order to promote sensitivity, acceptance and inclusion of differences in the school community and extracurricular programs.

OBJECTIVES:

1. Implement an instrument such as the NAIS Assessment of Inclusivity and Multiculturalism (AIM). (Winter, 2017)
2. Assess the curriculum for various voices and views that promote global awareness and multicultural capacity. (2016 and ongoing)
3. Affirm cultural diversity by reinforcing the existence and importance of both inclusion and diversity within the school’s five core values of the Xaverian charism: humility, trust, zeal, compassion and simplicity. (Ongoing)
4. Continue meaningful professional development for faculty, coaches and staff to increase awareness and action that promote sensitivity, acceptance, and inclusion of differences in the school and extracurricular programs. (Ongoing)
5. Strengthen and develop further the student Diversity Club at St. X and other Catholic high schools. (Ongoing)

GOAL 2: Saint Xavier will highlight and enhance diversity (cultural, ethnic, racial, economic, etc.) in school and extracurricular programs.

OBJECTIVES:

1. Promote the many ways Saint Xavier is diverse and welcoming through multiple social media and multimedia platforms, ensuring that publications and media highlight diversity. (Fall 2016 and ongoing)
2. Identify, celebrate and showcase diversity around campus and during community gatherings. (Ongoing)
3. Define diversity and adopt a diversity statement for the school. (Fall, 2017)

GOAL 3: Saint Xavier will assess compensation structures (salary and benefits) for faculty, administrators, coaches and staff for comparison with local, regional and national schools, and strive to provide competitive compensation that will allow the school to attract and retain the most qualified candidates for all positions.

OBJECTIVES:

1. Increase faculty salary scale to 93% of JCPS according to the following schedule:
 - 2016-2017: 1% increase to 91%
 - 2017-2018: ½% to 91.5%
 - 2018-2019: ½% to 92%
 - 2019-2020: ½% to 92.5%
 - 2020-2021: ½% to 93%
2. Assess compensation structures for all employee groups at St. X. (2016-2017)
3. Study and identify additional compensation options for employees who work beyond contractual responsibilities or expectations, i.e., National Board Certification. (Spring, 2019)

GOAL 4: Saint Xavier will take active steps to increase minority faculty and staff as positions open.

OBJECTIVES:

1. Develop relationships with School of Education Chairs at local, state and regional universities, especially institutions serving minorities (at least three minority-serving schools), to identify the best minority teacher and coach candidates. (2016 and ongoing)
2. Identify and utilize advertising strategies and professional journals (at least two publications) that target minority groups. (2016 and ongoing)

3. Increase social media presence on university campuses across the country. (Ongoing)
4. Create a Minority Advisory Council to promote St. X and its mission in minority communities. (Summer, 2016)

GOAL 5: Saint Xavier will take active steps to increase minority-student enrollment.

OBJECTIVES:

1. Involve minority faculty, students, parents and alumni in all facets of student recruitment, including school visits and Open House. (Fall, 2016 and ongoing)
2. Market St. X in ways that distinguish its programs and target different minority groups: billboard locations, multilingual text and appropriate visuals. (2016 and ongoing)
3. Showcase racial and ethnic diversity on the St. X website and social media, in publications and in marketing materials. (2016 and ongoing)
4. Share personal and professional achievements of students and alumni of color in promotional materials. (Ongoing)
5. Have a Saint Xavier presence, including alumni, at Metro-area community functions (Ongoing)

BRANDING AND ENROLLMENT MANAGEMENT

SUBCOMMITTEE MEMBERS: John McCarthy, Co-Chair, Kevin Smith, Co-Chair, Jim Beckett, Larry Bergamini, Carl Herde, Paul Humphrey, Mike Littell, Ann Logsdon, Jerry Roby, Felix Rodriguez, Rick Sorrels, Todd Spencer, Kelly Stratman, Missy Varga and Curt White

ASPIRATION 3: We aspire to extend the Saint Xavier brand to assist with enrollment management and to better serve the broader community.

GOAL 1: Saint Xavier will meet or exceed freshman enrollment goals consistent with current admissions standards for the school.

OBJECTIVES:

1. Class of 2021 (Fall, 2017): 346
2. Class of 2022 (Fall, 2018): 339
3. Class of 2023 (Fall, 2019): 298
4. Class of 2024 (Fall, 2020): 302
5. Class of 2025 (Fall, 2021): 319

NOTE: The detailed calculations for these numbers can be found in the Appendix.

GOAL 2: Saint Xavier will add a full-time Communications Coordinator position to its staff.

OBJECTIVES:

1. Develop a position description, search for and hire a Communications Coordinator. (2016)
2. Complete a communications audit of the following media: saintx.com, St. X app, social media, electronic newsletters, search engine optimization and earned media. (Spring, 2017)
3. Seek out new opportunities for the Communications Coordinator to expand the promotion of student, faculty and alumni achievement. (Spring, 2017 and ongoing)

GOAL 3: Saint Xavier will develop market surveys for current school families and prospective school families.

OBJECTIVES:

1. Conduct an internal survey on current school family perceptions of the St. X brand, school programs, barriers for potential attendance and other pertinent areas as identified by school leadership and marketing agency. (Survey of current families by Fall, 2016; ongoing annually)
2. Establish a volunteer advisory committee that includes current and former JCPS families to guide efforts in promoting the St. X brand in current and potential JCPS feeder schools. (November, 2016)
3. Conduct an external survey on individual perceptions of the St. X brand, school programs, barriers for potential attendance and other pertinent areas as identified by school leadership and marketing agency. (Spring, 2017)
4. Conduct a survey of alumni with potential legacy children on their general perceptions of the benefit of a St. X education and the value of the St. X legacy to their families to enhance the status of St. X as the first option for secondary education for legacy sons. (March, 2017)

NOTE: It is the recommendation of the Branding and Enrollment Management Committee to defer the creation of a formal goal on any educational programming below grade nine to the School and Student Programs Committee. If a goal to further investigate this area is recommended, then the market surveys mentioned in this goal will include appropriate questions.

GOAL 4: Saint Xavier will research and fully develop multiple summer camps and school-year programs that concentrate on non-athletic programs and activities.

OBJECTIVES:

1. Identify a staff member to manage all marketing, publications, staffing and enrollment of students in grades 5-8 in these programs. (2016)
2. Identify new and engaging program options to include STEAM education, etc. (January, 2017)
3. Identify key partner sites for off-campus programs and activities. (May, 2017)

GOAL 5: Saint Xavier will assess enrollment potential outside Jefferson County and in Indiana.

OBJECTIVES:

1. Establish a volunteer advisory committee made up of alumni and parents of current students and alumni to guide efforts to promote the St. X brand within their geographic areas.
(November, 2016)
2. Explore opportunities to better facilitate enrollment from the greater Louisville region, e.g., transportation options, financial aid and unique student talents, etc. (Fall, 2017)
3. Initiate individual, group and mass marketing activities to aggressively increase student attendance from the greater Louisville region. (Fall, 2018)

FINANCES

SUBCOMMITTEE MEMBERS: Bill Mudd, Co-Chair, Teresa Riggs, Co-Chair, Larry Bergamini, Karen Hamilton, Jennie Heintzman, Rich Lechleiter, Mike Littell, Jerry Plappert, Mark Raque, Hank Robinson, Steve Sautel, Gary Ulmer

ASPIRATION 4: We aspire to ensure the Saint Xavier experience is accessible to all by maintaining the school's financial stability and increasing the resources necessary to meet enrollment and program needs.

GOAL 1: Saint Xavier will seek additional charitable support for need-based tuition assistance, scholarships, endowments and special projects identified in the school's 2016 – 2021 Strategic Plan.

OBJECTIVES:

1. Establish a long-term vision for endowment fund growth that defines the financial target and associated timeline. (Fall, 2016)
 - a. Engage consultant to assess feasibility. (Refer to Objective 2.)
 - b. Develop a campaign to achieve the vision. (Refer to Objective 3.)
2. Conduct a pre-campaign study to assess donor willingness to fund the proposed objectives. (Spring, 2017)
 - a. Annual Fund: \$12 million
 - b. Capital Fund: \$10 million (based on the to-be-determined project costs)
 - c. Endowment Fund: \$15 million in cash and deferred gifts
3. Define and implement a detailed fundraising campaign plan based on the results of the pre-campaign study. (Fall, 2017 through Spring, 2022)
 - a. Present campaign plan and targets to the Board for approval. (Fall, 2017)
 - b. Begin silent phase of fundraising with the goal of securing 50% of the approval target prior to campaign public phase kick-off. (Fall, 2017)
 - c. Conduct formal kick-off of campaign public phase. (Timing is dependent on success of Item B above.)

GOAL 2: Saint Xavier will maintain strength in its financial operations through enrollment management, tuition control, charitable-giving efforts, tuition assistance, appropriate cost control and effective debt and capital spending management.

OBJECTIVES:

1. Minimize the tuition percentage increase each year through active enrollment management and effective controls of operating costs and capital expenditures
 - a. Maintain the optimal number of faculty and staff each year relative to student enrollment.
 - b. Manage controllable operating cost increases to less than 3% per year.
2. Prioritize funding for faculty pay scales to increase to 93% of the JCPS faculty scale by fiscal year 2020-2021.
3. Fund increases to support-staff salaries up to 2.5% per year.
4. Maintain tuition assistance of at least 11% of tuition revenue in each year.

FACILITIES AND TECHNOLOGIES

SUBCOMMITTEE MEMBERS: Mark Trier, Co-Chair, Hank Wall, Co-Chair, Stephen Ashby, Steve Crider, Alan Donhoff, Don Greulich, Steve Lannert, Charley Moore, Brad Rives, Perry Sangalli, Tony Scheler, Mike Thorp

ASPIRATION 5: We aspire to enhance our campus grounds, provide unsurpassed academic and co-curricular facilities, and sustain cutting-edge technologies.

GOAL 1: Saint Xavier will maintain and enhance the physical plant to ensure it is in good working order through ongoing implementation of the maintenance replacement schedule and the execution of projects identified in the Capital Expenditures Priority List.

Priority 1 – Year 1 of Strategic Plan

Priority 2 – Years 2 and 3 of Strategic Plan

Priority 3 – Years 4 and 5 of Strategic Plan

OBJECTIVES:

1. Replace baseball and football athletic artificial fields with new enhanced turf. (Priority 1)
2. Raise the visitor's coaches' box at the football stadium to enhance the visiting team's coaches' line of site to the players. (Priority 2)
3. Resurface running track upon completion of football field resurfacing and the raising of the coaches' box. (Priority 2)
4. Resurface the front driveway paving. (Priority 2)
5. Complete Flaget Hall tuck-pointing. (Priority 2)
6. Replace the Media Center HVAC system. The optimal time to do this is when this building is renovated. (Priority 2)
7. Replace the roof membrane of the Sterne Gymnasium roof. (Priority 2)
8. Improve the aesthetics of the fencing surrounding the athletic fields with the addition of windscreens with St. X branding (no advertising). (Priority 3)
9. Resurface the tennis courts as cracks appear. (Priority 3)

10. Replace Campus Ministry HVAC. (Priority 3)
11. Soundproof the band room so practice is not distracting to the surrounding facilities and classrooms. (Priority 3)
12. Replace the building locks in the Horton Support Building to make them consistent with other locks on campus. (Priority 3)
13. Study the feasibility of completing the Fire Suppression System for remaining non-fire sprinkler head areas of the campus to meet current codes. (Priority 3)
14. Study the feasibility of upgrading the theater lighting systems with LED lights and other energy-saving devices. Study upgrading the theater curtains and rigging system. (Priority 3)

GOAL 2: Saint Xavier will sustain and implement the use of cutting-edge technologies while promoting an energy-efficient and environmentally-friendly campus.

Priority 1 – Year 1 of Strategic Plan

Priority 2 – Years 2 and 3 of Strategic Plan

Priority 3 – Years 4 and 5 of Strategic Plan

OBJECTIVES:

1. Replace current phone system with a Voice over Internet Protocol (VoIP) phone system with the capacity to add a module in the following year for a fully-integrated paging announcement system. While programming this system, create an open technology that provides adaptability for future classroom teaching upgrades. This enhances communications and will reduce yearly long distance phone charges. (Priority 1; paging system is Priority 2)
2. Upgrade the current wireless internet infrastructure to ensure that the campus is able to maintain its high degree of internet demand. (Priority 3)
3. In year four of the strategic plan, study the benefits of upgrading of the WSTX closed circuit TV system versus adding a TVoIP system and how to best integrate either into the VoIP system. (Priority 3)

GOAL 3: Saint Xavier will examine facilities and determine areas in need of repurposing and/or refurbishing in order to meet or exceed school accreditation requirements and school program needs and will procure funds available to be used for each project as program planning and design are completed.

Priority 1 – Year 1 of Strategic Plan

Priority 2 – Years 2 and 3 of Strategic Plan

Priority 3 – Years 4 and 5 of Strategic Plan

OBJECTIVES:

1. Renovate the Callahan Media Center to reflect current library learning environments. (Priority 2)
2. Redesign the Poplar Level Road façade to have more openness and visual excitement. (Priority 2)
3. Renovate the boiler room into a maintenance shop and building supply storage by removing abandoned boilers and asbestos. (Priority 3)

STRATEGIC PLAN APPENDIX

- Gonsler Gerber Advancement Consultants (GGAC): SOAR Process
- GGAC: Aspirations, Goals and Objectives and Aspiration Team
Members Role and Responsibilities
- Core Committee Members
- Focus Group Sessions
- Focus Group Participants
- Branding and Enrollment Management: Enrollment Projections
- Finances: Summary of Financial Projections
- Finances: Projected Enrollment
- Facilities and Technologies: 2016-2021 Long Range Plan Estimated
Costs



Board of Directors Strategic Planning Session

Jason McNeal
Partner
Cal Stoney
Partner

September 19, 2015

Activity

Describe a
high point
experience in
your
involvement
with St. X.



Our Plan

- Appreciative Inquiry for Planning
- SOAR – St. X Strengths, Opportunities, Aspirations, and Results
- Next Steps From Today

Appreciative Inquiry: Assumptions

- People have more confidence to journey to the future when the best of the past is carried forward
- In every organization, something works
- What we focus on becomes our reality
- The questions we ask help determine our focus
- Affirming questions elicit more powerful data

Source: Cooperrider & Whitney, 1999

Appreciative Inquiry: Process

- **S**trengths
- **O**pportunities
- **A**spirations
- **R**esults

Source: Cooperrider & Whitney, 1999

St. X Strengths

- **Activity Review: The High Point Experience**

What did you value most?

Without being modest, when you think of St. X
what makes you the most proud?

What are the strengths of St. X?

St. X Opportunities

- **Activity:**
Reflecting on the strengths and values of St. X, focus on what Louisville, our students, and our broader world really need from St. X.

What are the interesting trends that you see or issues that you are aware of?

GonserGerber. Assessment of Graduates

St. X Aspirations

- **Activity:**
Assume you go into a deep sleep, one that lasts 10 years. As you sleep, powerful and positive changes occur at St. X – real miracles happen – and our organization becomes all that you could envision – the ideal St. X.

It is 2025, what do you see that is new, changed, expanded, better, effective, and/or successful?

GonserGerber. Assessment of Graduates

St. X Results First Steps

- **Activity:**
Reflecting on your description of St. X in 2025, what key outcomes, goals, or objectives, which could be measured, would provide evidence and/or indicate that St. X has achieved your vision?

GonserGerber. Assessment of Graduates

A Word About Aspirations, Goals and Objectives

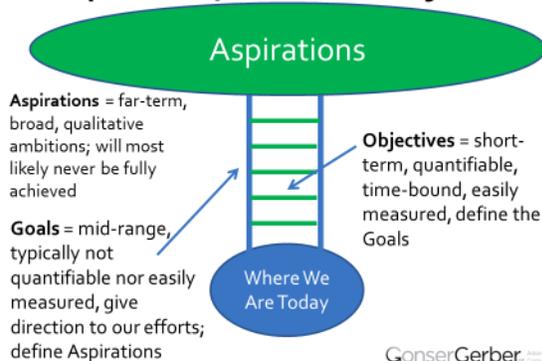
Aspirations = broad, far-term, never quantifiable, direction-setting statements for the school that should be inspiring

Goals = longer-term, sometimes nebulous, not easily measured, define the Aspirations

Objectives = shorter-term, quantifiable, time-bound, easily measured

GonserGerber. Assessment of Graduates

Aspirations, Goals and Objectives



GonserGerber. Assessment of Graduates

Thank You



Jason McNeal
&
Cal Stoney
www.gonsergerber.com

GonserGerber. Assessment of Graduates

ASPIRATIONS, GOALS AND OBJECTIVES

As provided by Gonser Gerber Advancement Consultants; adapted from LeBlanc, Raymond. *Achieving Objectives Made Easy!* (2008)

Overview

1. Aspirations, goals and objectives are tools for accomplishing what you want to achieve.
2. Aspirations are broad, inspirational, direction-setting statements that provide a path for an organization's efforts. They are rarely fully achievable.
3. Because aspirations are so broad, goals provide more specific information about what you aim to accomplish. You may not be able to say definitively that you have accomplished a goal.
4. Objectives can be easily measured.
5. Goals are longer term aims and objectives are usually accomplished in the short or medium term.
6. Goals are hard to quantify or put definitely in a timeline, but objectives should be given a timeline and be measurable.

When you have an aspiration, it is important to set both goals and objectives. Once the difference between goals and objectives is understood, you will realize the importance of having both of them.

Without objectives, you will find it difficult to make steady progress toward your goals. Without goals, you may find that you are busy and working hard, but you rarely will get where you want to be.

Definition of Goals and Objectives

- Goals – longer-term aims that you want to accomplish.
- Objectives – concrete attainments that can be achieved by following a certain number of steps.
- Goals and objectives are often used interchangeably, but the main difference comes in their level of concreteness. Objectives are very concrete, whereas goals are less so.

Remembering the Differences between Goals and Objectives

- Goals – has the word “go” in it. Your goals should go forward in a specific direction.
However, goals are more about everything you accomplish on your journey, rather than getting

to that distant point. Goals will often go into undiscovered territory and you therefore can't even know where the end will be.

- Objectives – has the word “object” in it. Objects are concrete. They are something that you can hold in your hand. Because of this, your objectives can be clearly outlined with timelines, budgets, and personnel needs. Every area of each objective should be firm.

Measuring Goals and Objectives

- Goals – unfortunately, there is no set way in which to measure the accomplishment of your goals. You may feel that you are closer, but since goals are de facto nebulous, you can never say for sure that you have definitively achieved them.
- Objectives – can be measured. Simply phrase your objective in the form of a question. For example, “I want to accomplish x in y amount of time” becomes “Did I accomplish x in y amount of time?” This can easily be answered in a yes or no form.

An Example of Aspirations, Goal, and Objectives

Aspiration: Our organization will be known as the exemplar among national organizations in our field for volunteer and partnership engagement.

- Goal – We will enhance the opportunities for volunteers to engage with our organization in a variety of meaningful ways.
 - Objective: We will establish a Volunteer Action Committee by the end of the 2016 fiscal year.

ASPIRATION TEAM MEMBERS: ROLE AND RESPONSIBILITIES

Aspiration Team Member Role

The Aspiration Teams are comprised of Strategic Planning Committee members and others who have an interest in advancing the school. The role of the Aspiration Teams is to craft, present, and gain support for specific goals and objectives that support the achievement of one of the Aspiration Statements of the Strategic Plan.

Aspiration Team Member Responsibilities

In order to craft specific goals and objectives for the school's Strategic Plan, Aspiration Team members will:

- Make recommendations on other constituents to be involved in the process
- Participate in 2-3 group meetings to provide information and feedback on draft goals and objectives
- Conduct research as needed to assure that proposed goals and objectives are appropriate and achievable
- Inform and develop the written goals and objectives for the Strategic Plan
- Keep the process as a high priority for the school
- Ensure that school core values and goals are reflected in the plan
- Monitor initial progress toward achievement of plan goals and objectives

STRATEGIC PLAN

Core Committee Members

Teresa Riggs, Co-Chair

Kevin Smith, Co-Chair

Dan Able

Mary Ashlock

Larry Bergamini

Theresa Burch

Frank Espinosa

Jennie Heintzman

Paul Humphrey

David Johnson

Mike Littell

Ann Logsdon

Mike Lush

John McCarthy

Bill Mudd

Perry Sangalli

Mark Trier

Hank Wall

STRATEGIC PLAN

Focus Group Sessions

September 19, 2015

Board of Directors

October 26, 2015

Group 1: Parent Volunteers

Group 2: Students

Group 3: Leadership Team

Group 4: Alumni Volunteers

October 27, 2015

Group 5: Alumni Stakeholders

Group 6: Parent Stakeholders

Group 7: Faculty & Staff

October 28, 2015

Group 8: Community Leaders

Group 9: Emeritus, Other Major Donors

Group 10: Faculty & Staff

STRATEGIC PLAN
Focus Group Participants

Aaron Abell	P.J. Duckworth	Tim Kraus	Efren Quirino
Dan Able	Nate Durbin	Rob Kremer	John Raque
Joe Ackermann	Karen Edlin	Joe Kroh	Mark Raque
Dan Albers	Tom Eifler	Matt Kuerzi	Nathaniel Reid
Tony Ambrose	Carl Ellsworth	Sam Landoch	Rebecca Reisert
Dan Amlung	Will Elpers	Steve Lannert	Don Reiss
Steve Ashby	Bert Erny	Rich Lechleiter	Cathy Reynolds
Michael Azzara	Michael Ervin	Brad Lies	Dennis Riggs
Michael Bailey	Frank Espinosa	Mike Littell	Teresa Riggs
Billy Basham	Jeff Farmer	Paul Loheide	Brad Rives
Jean Bell	Pat Farnan	Mike Lush	Jerry Roby
Larry Bergamini	Russ Ferreri	Craig Mackin	Art Rothgerber
Nathan Bird	Mark Fetter	Mike Mackin	Chase Rowan
Brian Bivens	Tony Fink	Tom Malewitz	Kaelin Rybak
Rick Blair	Jim Fitzgibbon	Paul Mangeot	Bill Rybak
Ben Blincoe	Carrie Foster	Joe Mattingly	Eric Saling
Ned Booker	Alan Gates	Sam Mayo	Perry Sangalli
Becca Booth	Bob Glasford	Ron Mazzoli	Steve Sautel
Ted Bordador	Steve Gray	Ann McBride	Tony Scheler
Glenn Bossmeyer	Don Greulich	John McCarthy	Rob Schenkenfelder
David Bradshaw	Caleb Grimes	Danny McDonald	Bill Sherman
Amy Brooks	Gary Gruneisen	Jay McGowan	Nick Simon
Paul Buddeke	Charlie Hagerty	Kay Medley-Cain	Kevin Smith
Theresa Burch	Scott Haner	Connor Meeks	Jacob Smith
Al Burke	David Heintzman	Andy Meirose	Michael Smith
Bro. Matthew Burke	Mike Hendricks	Laura Melillo-Barnum	Mary Smith
Paul Burke	Carl Herde	Charlie Mercer	Sorin Spohn
Logan Butler	Alice Hession	Michele Metcalfe	Matt Stack
Peter Campbell	Steve Higbee	Barrett Metzger	Dick Sullivan
Tom Campbell	Jed Hilbert	Darryl Metzger	Joey Summers
Matt Carey	Oliver Hirn	Mark Metzger	Carrie Syberg
Kevin Carnes	Gavin Howard	Howard Meyer	Rick Tobe
Margie Charasika	Bro. Cornelius Hubbuch	Kenyon Meyer	Mark Trier
Pat Chitwood	Glenn Hubbuch	Aaron Miller	Jill Tucker
Corey Chitwood	Al Huber	Charley Moore	Gary Ulmer
William Cohen	John Huff	Eileen Moore	Colin Underhill
Tony Colyer	Frank Hulsman	Craig Mueller	Rosanna Vessels
Ben Cottrell	David Ianke	Tom Mueller	Hank Wall
Nic Crider	Paige Janes	Rick Murphy	Curt White
Steve Crider	Ben Jankowski	Stephen Murphy	Tony Wilcox
Dick Daniel	Dave Johnson	Bobby Nichols	Brad Wilcox
Evan Davis	Ian Kania	Matt Ott	Chuck Willenbrink
Charlie Dicken	Paul Karem	Beatriz Pacheco	Earl Winebrenner
Stephanie Dierig	David Karem	Tom Perrone	Stephen Wolf
Sarah Dilger	Don Kelly	Sam Picota	David Worland
Alan Donhoff	David Killeen	Andy Porta	Kyle Yochum
Ben Doninger	Connor Knight	Roy Potts	Adam Zoeller
Tucker Donlon	David Koch	Jason Prado	
Arnold Drury	Ron Kramer	John Price	

Enrollment Projections 2017-2018 to 2021-2022

Catholic Enrollment Projections**				Non-Cath Pool (Best)			Non-Cath Pool (Base)			Non-Cath Pool (Least)			Test Pool Totals			Total Enrollment			GOAL	
		43%	42%	37%	70-30%	72-28%	74-26%	70-30%	72-28%	74-26%	70-30%	72-28%	74-26%	43-70-30%	40-72-28%	37-72-26%	Best	Base	Least	42-70-30%
17-18 FY	678	292	285	251	125	113	102	122	111	100	108	98	88	416	396	339	354	327	288	346
18-19 FY	665	286	279	246	123	111	100	120	109	98	105	96	86	409	388	333	347	321	299	339
19-20 FY	585	252	246	216	108	98	88	105	96	86	93	84	76	359	341	293	305	282	263	298
20-21 FY	592	255	249	219	109	99	89	107	97	87	94	85	77	364	345	296	309	286	266	302
21-22 FY	625	269	263	231	115	105	94	113	102	92	99	90	81	384	365	313	326	302	281	319

Base Year (Appropriate budget already established and approved)

16-17 FY	643	283			90															317	
		45%			24%																85%

** All Catholic Feeder Schools (including Model. Pitt, Aloysius and Nativity)

Summary of Financial Projections

	Fiscal Year Ending 6/30/2017	Fiscal Year Ending 6/30/2018	Fiscal Year Ending 6/30/2019	Fiscal Year Ending 6/30/2020	Fiscal Year Ending 6/30/2021
Student Enrollment	1,301	1,279	1,227	1,198	1,176
Tuition Rate	13,175	13,700	14,250	14,820	15,415
REVENUES					
Tuition and Fees	17,868,330	18,233,275	18,161,975	18,417,680	18,780,590
Auxiliary Enterprises (net)	203,000	203,000	203,000	203,000	203,000
Donations and Fundraising	2,685,000	2,127,500	2,221,065	2,265,720	2,311,490
Reserve Fund	-	-	-	69,390	-
Other Income	1,903,000	969,000	969,000	969,000	969,000
TOTAL REVENUES	22,659,330	21,532,775	21,555,040	21,924,790	22,264,080
EXPENDITURES					
Salaries and Benefits	12,582,900	12,925,005	13,086,040	13,445,325	13,723,680
Education and Administration	1,653,805	1,795,850	1,748,745	1,843,055	1,742,330
Advancement	956,105	983,090	1,005,405	1,033,600	1,058,080
Plant Operations	1,966,755	2,021,260	2,071,825	2,129,545	2,184,520
Reserve Fund	56,500	369,305	204,460	-	37,205
Debt Service	793,265	793,265	793,565	793,265	793,265
Student Aid	2,100,000	2,145,000	2,145,000	2,180,000	2,225,000
TOTAL EXPENDITURES	20,109,330	21,032,775	21,055,040	21,424,790	21,764,080
EXCESS REVENUES OVER EXPENDITURES	2,550,000	500,000	500,000	500,000	500,000
Depreciation and Amortization	(1,657,500)	(1,657,500)	(1,657,500)	(1,657,500)	(1,657,500)
EXCESS REVENUES OVER EXPENDITURES (accrual basis)	892,500	(1,157,500)	(1,157,500)	(1,157,500)	(1,157,500)
ADJUSTMENTS TO CASH BASIS					
Capital Outlay	(2,550,000)	(500,000)	(500,000)	(500,000)	(500,000)
Depreciation and Amortization	1,657,500	1,657,500	1,657,500	1,657,500	1,657,500
EXCESS UNRESTRICTED REVENUE OVER EXPENDITURES (cash basis)	-	-	-	-	-

Projected Enrollment - 2/29/2016

	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
Freshmen	308	327	321	282	286
Sophomores	304	302	321	315	276
Juniors	356	295	292	311	305
Seniors	333	355	293	290	309
	1,301	1,279	1,227	1,198	1,176

2016-2021 Long Range Plan Estimated Costs

Projects	Estimated Cost Summer 2016 Dollars	Priority #1		Priority #2		Priority #3	
		Estimated Cost Range		Estimated Cost Range		Estimated Cost Range	
Maintain and Enhance							
Running Track Resurfacing	75K - 80k			\$ 81,000	\$ 87,000		
Sports Turf Replacement Football & Baseball fields	900K- 1000k	\$ 900,000	\$ 1,000,000				
Athletic Fencing windscreens branding	6k-11K					\$ 7,000	\$ 12,000
Tennis Court Crack Seal & repaint	54K -58K					\$ 61,000	\$ 65,000
Football stands Visitors Coaches box renovation (Must be done before track resurface)	55k			\$ 60,000	\$ 65,000		
Flaget Hall Tuck Pointing	57K-60K			\$ 62,000	\$ 65,000		
Sterne Gymnasium EPDM Roof	73K			\$ 79,000	\$ 85,000		
Campus Ministry (freestanding)HVAC	65K					\$ 73,000	\$ 85,000
Band Room Sound Proofing(thru year 3)	35k-41k					\$ 40,000	\$ 46,000
Horton Support Building Lock Replacement	25-30k					\$ 28,000	\$ 34,000
Front Drive Resurfacing	35k-40k			\$ 38,000	\$ 43,000		
Repurpose							
Boiler Room Renovated to Storage	102K-120K					\$ 114,000	\$ 134,000
Media Center Renovation w/o HVAC unit				\$ 1,920,000	\$ 2,980,000		
Library HVAC mech unit only (integrate with renovation)	181-185K			\$ 195,000	\$ 200,000		
Implement Cutting Edge Technologies							
Upgrade Wireless Infrastructure	96k					\$ 108,000	\$ 115,000
Voice over IP Phone System	125K	\$ 125,000	\$ 130,000				
Paging System (adding phone in each classroom)	21K			\$ 23,000	\$ 26,000		
Totals	\$ -	\$ 1,025,000	\$ 1,130,000	\$ 2,458,000	\$ 3,551,000	\$ 431,000	\$ 491,000
				From	\$ 3,914,000	To	\$ 5,172,000

Note: 4% inflation was used between each priority