

## Vision Report: Working Document

*This document is meant to represent a “live” tabulation of Vision implementation. Highlighted areas in yellow designate tasks that are scheduled to be addressed, but have not yet seen measurable progress. Highlighted areas in green designate tasks in which the initial timeline has been adjusted. For more information about the Vision, see the Archdiocesan website ([www.catholiccincinnati.org](http://www.catholiccincinnati.org), select “Lighting the Way”)*

### Domain: Catholic Identity/Religious Formation

**STRATEGIC GOAL #1 – Cultivate an atmosphere within each school that incarnates Gospel values (i.e. those exemplified in the Corporal and Spiritual works of mercy), and celebrates the vitality of the Catholic faith.**

**Goal #1 - Objective #1:** Principals and faculty members will grow in their faith through in-services and faith formation courses as set forth by Archdiocesan norms and will model that faith in the classroom and that the Archdiocese provide courses to support this effort.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Require every school to have a religious in-service program each school year.	Principals	Fall 2012	Ongoing	OEC, Regional Directors	9-10-12: Beginning initial monitoring by OEC & CSO. 10-2-12: Reminded Principals at meeting
2.	Develop a faith formation process for new principals	CSO & OEC	Summer 2013	Ongoing	Laura M.	9-1-12: Forming Committee w/ Ken Gleason & Kris Krimm 11-5-12: Initial planning meeting to take place in mid-November 12-5-12: Initial meeting has taken place. Concrete plans are being formed. Negotiating dates and venue. 1-16-13: Dates have been identified. Sessions are being defined. Committee work is ongoing. 2-8-13: Draft schedule for Boot Camp is fully developed. Planning meetings have continued. 2-26-13: Boot Camp agenda has

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						<p>been finalized. Securing speakers.  5-13-13: Speakers secured,  program is ready to go. Allowing  recent new principals and CSO  staff to participate as well.  8-1-13: Boot camp took place.  Gathering data on effectiveness.  9-1-13: Data is favorable. Plans  underway for Boot Camp in 2014.</p>
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**Goal #1 - Objective #2:** Raise student awareness of vocations to the priesthood and religious life.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Celebrate vocation awareness week	Principals	January 2013	Ongoing	OEC, Regional Directors	9-10-12: Some celebrations are taking place. Will continue to research and monitor.
2.	Priests, deacons, and religious should be actively present in the school.	Pastors & Principals	Fall 2012	Ongoing	OEC, Regional Directors	9-10-12: Will monitor. Should we circulate a formal survey? 10-2-12: Reminded Principals @ meeting
3.	Encourage Catholic schools to visit the Athenaeum of Ohio	Pastors & Principals	Fall 2012	Ongoing	OEC, Regional Directors	9-10-12: Should we circulate a formal survey? 10-2-12: Reminded Principals @ meeting 2-26-13: Reminded Principals at 2-22 meeting on the "Top 10" document

**Goal #1 - Objective # 3:** Encourage students to participate in prayer and faith sharing with each other.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Begin each class with prayer or a faith sharing activity.	Principals	Fall 2012	Ongoing	OEC, Regional Directors	9-10-12: Monitoring as we can. Considering a formalized monitoring system. 10-2-12: Reminded Principals @ meeting 2-26-13: Reminded Principals at 2-22 meeting on the "Top 10" document

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2.	Provide opportunities for student retreats	Principals	Fall 2013	Spring 2014		2-26-13: Reminded Principals at 2-22 meeting on the "Top 10" document
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**Goal #1 - Objective #4:** Consideration will be given to the compatibility of the candidate with Catholic identity as part of the hiring process for teachers and staff.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Develop guidelines for the hiring process to ensure candidate's compatibility with the teachings of the Catholic faith.	CSO & OEC	Fall 2012	Fall 2014	Sherry G., Jim R.	9-10-12: Forming committee w/ Amy McEntee. 12-5-12: Committee has met. Several ideas are being developed. 9-1-13: New process being considered. 10-1-13: New process proposed. Final version will be presented to Archbishop by 12-31-13. 1-24-14: Process has been developed and is being refined.

**Goal #1 - Objective #5.** Integrate the Catholic worldview in all subject areas.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Conformance with the religion/faith formation curriculum established by the Archdiocesan Office of Evangelization & Catechesis will be required of all elementary schools	Principals and DRE's	Fall 2012	Ongoing	Jim R.	9-10-12: Working with OEC to integrate language into RE and AoC Policy Manuals.
2.	Conformance with the Archdiocesan Religion course of studies will be required of all high schools	CSO	Fall 2012	October 2017	Regional Directors	9-10-12: Regional Directors will evaluate implementation in their school visits. 9-1-13: More-or-less final draft of religion curriculum is completed. 11-11-13: Curriculum has been approved by Archbishop Schnurr. Will finalize document for distribution.

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3.	Research will be undertaken to identify resource available for all subject areas	CSO	Fall 2012	Ongoing		10-30-12: Effort ongoing to integrate Catholic identity into the developing ELA Graded Course of Study. 2-8-13: Catholic identity present in new P-5 ELA standards. Will continue to integrate in future years.
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**Goal #1 - Objective # 6.** Provide for the celebration of the Eucharist on a regular basis (ideally on a weekly schedule) and invite parents/guardians and the community-at-large to attend.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Identify the Catholic schools having Mass celebrated on a weekly basis.	CSO	Fall 2012	December 2012	Laura M.	9-10-12: Laura will make contact with Worship Office subcommittee to begin research. 9-24-12: Laura to circulate survey to schools through Regional Directors. 10-30-12: Data collected, forwarded to OEC. OEC is studying. 12-5-12: Analysis of data is still underway. 2-8-13: Regional Directors will follow up with schools that are not celebrating weekly Mass
2.	Identify the challenges that prevent the celebration of Mass on a weekly basis.	CSO	January 2013	May 2013	Laura M.	9-10-12: See above.
3.	Investigate solutions that would allow for the regular celebration of the Mass.	CSO	Summer 2013	Summer 2014		2-8-13: Regional Directors will follow up with schools not celebrating weekly Mass. Solutions will be investigated during meetings.
4.	Prepare students to participate in the Eucharist	Administrators & Teachers	Fall 2014	Ongoing		

**Goal #1 – Objective # 7.** Designate a properly qualified catechetical leader in each school to assist the principal in religious leadership.

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Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Identify properly qualified catechetical leaders in parish/school communities	OEC	Fall 2012	December 2012	Ken G.	9-10-12: Working w/ OEC Staff. 10-30-12: OEC is defining this role and developing different options of what this might look like in schools. 8-1-13: Catechetical leaders have been identified in every school. Duties are being written. 11-25-13: List of duties have been completed. 1-24-14: List of expectations developed. Planning to present to principals at 2-21 meeting.
2.	Ensure that a relationship exists between the principal and the catechetical leader	OEC	January 2013	Fall 2013		11-9-12: OEC is defining relationships. 1-24-14: Relationships will be presented at 2-21 meeting.

**STRATEGIC GOAL #2 – Provide opportunities for adult faith formation whenever parent/guardians (adults) gather so they will be empowered to fulfill their responsibility as primary religious educators of their families (children).**

**Goal #2 – Objective #1:** Implement the “Nurturing Family Faith Initiative” strategies in our Catholic schools.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Require that principals attend the Domestic Church Summit in October 2012	Superintendent	Fall 2012	October 1-2 2012	Jim R.	9-10-12: 98 principals have registered. We are following up on non-registrants. 10-1-12: Most principals in attendance

**Goal #2 – Objective #2:** Use the ACRE test results with faculty and parent/guardians to assist in faith development.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
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1.	Develop resources and train teachers on how to use the ACRE results to enhance student faith development.	OEC	Fall 2012-2013	June 2013	Ken. G.	9-10-12: Ken G. is coordinating this with OEC.
2,	Require the ACRE inventory include questions specific to the Archdiocese of Cincinnati.	OEC	Fall 2012	January 2015	Ken G.	9-10-12: OEC is working on developing questions. 12-5-12: Questions have been integrated.

**Goal #2 – Objective #3:** Identify opportune moments and resources for faith formation of parents/guardians.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Communicate upcoming events using school and parish social media.	Principals (or their designee) and DRE's	Fall 2014	Ongoing		8-1-13: Communication via social media is integrated into Archdiocesan marketing plan.
2.	Provide training to local personnel to maximize the use of technology and develop a plan with local leaders to secure necessary technology resources	CSO	Fall 2012	Ongoing	Sherry G.	9-10-12: Working with Sean Ater & Tech. Committee to begin work. 12-5-12: Has been discussed with Technology Committee.
3.	Include faith formation activities as a part of all events where parent/guardians and other adults are present.	Principals and DRE's	Fall 2012	Ongoing		10-2-12: Reminded Principals at meeting 2-8-13: Evangelization and Catechesis are being inserted into the CYO-Archdiocesan agreement (to be employed in future school years). 2-26-13: Reminded Principals at 2-22 meeting on the "Top 10" document

**Goal #2 – Objective #4:** Develop a Catholic Identity Vitality Metric to measure the effectiveness of Catholic identity in our schools.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Develop a Catholic Identity Vitality Metric that provides individualized assessments of the quality of Catholic identity and faith	CSO, OEC, Regional Focus Groups	Fall 2012	Summer 2013	Jim R., Ken G.	9-10-12: Fr. Earl Fernandes performed some initial work on this in the spring. Ken is checking

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	formation in elementary and secondary schools.					to obtain an update. 12-5-12: Forming committee to do work. 1-16-13: Committee has been formed and will begin meeting soon. 2-8-13: Committee is meeting. 4-11-13: Discussing alignment between metric, high school religion curriculum, and other faith-related initiatives. 9-1-13: Several drafts have been completed and are being reviewed. 1-24-14: Metric has been developed. Will be presented at 2-21 principals' meeting.
2.	Provide Catholic Identity Metric to school and parish leaders. Assist schools in interpreting metric results.	CSO, OEC	Spring 2014	Ongoing		10-1-13: Metric will be presented in the spring of 2014 (adjusted from fall 2013). 1-24-14: Metric has been developed. Will be presented at 2-21 principals' meeting.
3.	Identify poorly performing schools on the Catholic Identity Metric. Devise plans to improve performance.	CSO, OEC	Fall 2014	Ongoing		
4.	Evaluate the Catholic Identity Metric regularly. Modify when needed.	CSO, OEC	Spring 2015	Ongoing		

**STRATEGIC GOAL # 3 – All schools will promote the integration of their students into being active members of their parish.**

**Goal #3 – Objective # 1:** Create opportunities for priests and students to interact.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
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1.	Invite priests to celebrate Mass, give vocation talks, retreats, be present at report card distribution, sporting events, plays etc.	Pastors & Principals	Fall 2013	June 2014		9-1-13: Efforts being integrated into the Youth Athletics Initiative and Vocations Awareness Week.
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**Goal # 3- Objective # 2:** Encourage students to become integrated into the parish through service and ministerial opportunities.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Develop student pastoral leadership skills within each school community	Pastors, Principals, DRE's, Campus Ministers	Fall 2012	Fall 2014		
2.	Offer service awards to students who give outstanding service to their parish	CSO, OEC	Fall 2014	Fall 2014		5-13-13: Timeline adjusted from Fall, 2012 to Fall 2014.
3.	Invite students to take part in the Evangelization processes of their parish.	Pastors, Principals, DRE's, Youth Ministers	Fall 2012	Fall 2014		10-2-12: Reminded principals of this responsibility at meeting
4.	Develop age appropriate, liturgical Ministers in each school community (server, reader, Eucharistic minister, etc.)	Pastors, Principals, DRE's, Youth Ministers	Fall 2012	Fall 2014		

## Strategic Planning Report

### Domain: Academic Excellence Task Force

**STRATEGIC GOAL #1 - Create an environment that maintains Archdiocesan standards of academic excellence while encouraging students to discover and fulfill their potential.**

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**Goal #1 - Objective #1:** Research, develop, and implement Archdiocesan Academic Standards that are based on the Common Core Standards

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Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Implement newly written Math Graded Course of Study	School Administrators	Fall 2012	Ongoing	Carole R.	9-10-12: Integration is ongoing.
2.	Provide professional development for administrators and teachers of math and for each content area as each new GCS is published	CSO Curriculum Office, School Administrators	Fall 2012	Ongoing	Carole R.	9-10-12: Inservices are planned for fall and spring of the 2012-2013 school year. 9-24-12: Calendar planning; common inservices in 2012-2013 12-5-12: A series of math common core workshops are being offered this week and next.
3.	Verify implementation through assessments, i.e. ITBS, Common Assessments	CSO Directors, School Administrators	Fall 2012	Ongoing	Carole R., Regional Directors	9-10-12: Will monitor during school visits.
4.	Develop and promulgate Reading/Language Arts GCS	CSO Curriculum Office, Committee	April 2012	January 2014	Carole R.	9-10-12: ELA GCS is in process. 11-5-12: The GCD is making great progress. Grades P-5 should be reading in late winter, 2013. 12-5-12: Planning and communication underway for ELA common core professional development to principals and teachers. 1-16-13: Writing is ongoing. PD is finalized for spring semester and summer. 2-8-13: Grades 1-5 are finished. Approved textbook list has been promulgated. 2-27-13: Making final preparations to release GCS. Provided PD for principals at 2-21 meeting/retreat. 5-13-13: GCS was released in March. Active planning around GCS for next year. 10-1-13: Writing for 6-8 ELA GCS underway.
5.	Create a timeline for remaining content areas as Common Core Standards become available	CSO Curriculum Office	Spring, 2013	Fall, 2013		2-27-13: Timeline has been partially developed.

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**Goal #1 - Objective #2:** Develop measures to document the academic growth of each child

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Create and promulgate use of standards-based student report card for all schools within the Archdiocese	CSO, advisors, School Administrators, Teachers	Fall 2012	Ongoing as standards available	Carole R.	9-24-12: Jim and Carole to meet to discuss first steps. 2-8-13: Defining a timeline of how this will be developed over the coming months. Draft should be ready by mid-summer. 5-13-13: Draft completed and under review. Schools have volunteered to pilot report card next school year. 6-5-13: Pilot schools are being trained in report card. Will monitor effectiveness during the coming school year. 8-1-13: Pilot schools are using report card. 11-25-13: Principals reported on report card during Nov. 21 Principals' Meeting. 1-24-14: Report card pilot will continue during the 1415 school year.
2.	Measure longitudinal student growth by using consecutive grade test results	CSO, School Administrators	June 2012	Ongoing		4-11-13: ITBS tests are being administered using a consecutive grade schedule. 5-13-13: Testing completed. Scores are being received. 6-5-13: Test scores have been analyzed.
3.	Choose standardized tests that are aligned with Common Core Standards	CSO, School Administrators	Fall 2013	Ongoing		4-11-13: ITBS tests are aligned (new norms). Other tests (ACT, SAT, etc.) will be aligned in future years (as per information from the publishing companies).
4.	Choose high school placement test that will be an accurate predictor of student success in high school	CSO, H.S. Administrators	Fall 2014	Ongoing	Carole R.	2-8-13: Have been in active conversation with high schools about using the ACT Explore instead of the HSPT.

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						Conversation and research is ongoing. 10-1-13: High school principals voting on ACT Explore vs. HSPT. 11-25-13: Principals voted in favor of ACT Explore. Will make transition for 2014-2015 school year. Investigating transition of ACT to ACT Aspire.
5.	Develop a process to share academic data among school administrators	CSO, School Administrators	January 2013	January 2014	Carole R.	2-8-13: Releasing analyzed HSPT data to principals. Developing a more defined process. 5-13-13: Planning underway to integrate test data planning into professional development for principals. 11-25-13: Various test data released during fall.

**Goal #1 – Objective #3:** Develop an Academic Vitality Metric to measure the quality of academics in the Catholic schools.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Develop an Academic Vitality Metric that provides individualized assessments of the quality of academics in elementary and secondary schools.	CSO, Curriculum Committee, Regional Focus Groups	Fall 2012	Summer 2013	Carole R.	9-10-12: A draft is being developed. Have assembled a committee to review Metric. 10-30-12: Draft metric is developed and is being reviewed. 11-5-12: Carole to meet with Regional Directors to discuss metric content and implementation. 1-16-13: Draft completed and under review. 2-8-13: Further revisions have taken place. 5-13-13: Aligning metric to Principal Evaluation Process. 11-1-13: Metric has been finalized.

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2.	Provide Academic Vitality Metric to school and parish leaders. Assist schools in interpreting metric results.	CSO Curriculum Office	Spring 2014	Ongoing		11-25-13: Will present at spring Principals' Meeting (adjusted from Fall, 2013).
3.	Identify poorly performing schools on the Academic Vitality Metric. Devise plans to improve performance.	CSO Curriculum Office	Spring 2014	Ongoing		
4.	Evaluate the Academic Vitality Metric regularly. Modify when needed.	CSO Curriculum Office	Fall 2013	Ongoing		

**Goal #1 – Objective #4:** Incorporate technology to enhance the teaching and learning experience

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Establish a standardized data collection, storage and tracking system for managing student academic growth (e.g. CEMIS)	Superintendent, Committee, IT Personnel	Fall 2012	Fall 2013	Sherry G.	9-10-12: Will work with tech. committee to investigate and propose a plan. 12-5-12: Sherry met with Technology Committee recently to begin planning. 1-16-13: Committee work is ongoing. Good progress. 2-8-13: Committee has recommended the SMS program. SMS program presented to CSO staff and PACTS committee. 2-27-13: Encouraged Principals to investigate SMS at 2-22 meeting. 4-11-13: SMS has been presented to several schools and clusters. Some questions remain. 5-13-13: Many schools piloting SMS for 2013-2014 school year. 1-24-14: We have evaluated pilot and will report at 2-21 principals' meeting.
2.	Revise and update technology curriculum based on best practices	CSO, School Administrators, Teachers, Tech Coordinators	Fall 2013	Fall 2014		

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3.	Assess current use of technology uses and needs	CSO, School Administrators	Fall 2013	Annually		1-24-14: Assessment has taken place.
4.	Develop a process to ensure that all schools are using current technology tools for instruction and testing/assessment	CSO, School Administrators	January 2014	June 2014		
5.	Develop policies to ensure that teachers and students integrate technology in all grades	CSO, School Administrators	Fall 2013	January 2014		
6.	Develop standardized social media platforms for professional development activities and for use as a learning community	Teachers Committee	Fall 2012	Ongoing	Sherry G.	9-10-12: Will work with tech. committee. 11-5-12: Committee has met and is reviewing various platforms. 1-16-13: Committee work continues.

**Goal #1 – Objective #5:** Develop and measure the effectiveness of instructional programs based on the Academic Standards of the Archdiocese to meet the individual needs of students

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Define the services and personnel necessary to meet the academic needs of all students and schools	Superintendent	Fall 2012	Ongoing		9-24-12: Carol and Mayra gathering data on ESOL students. They can now train on administering ESOL test to CPS schools. 1-16-13: ESOL handbook has been promulgated. Planning for new special needs program is underway with local university.
2.	Develop policies and programs for meeting the needs of the gifted, special needs and ESOL students	CSO, ACOE	Fall 2012	Ongoing		9-24-12: See #1 (above)
3.	Develop and implement a common application form to identify student academic needs	CSO	Spring 2014	Fall, 2013		11-25-13: Adjusted to Spring, 2014.
4.	Promote, introduce, and support preschool programs at elementary schools throughout the Archdiocese (where possible)	CSO	Fall 2012	Ongoing	Chris P., Sue K., Carole R., Regional Directors	9-10-12: Work is ongoing; several preschools are in the process of being established. 10-1-13: Working to implement Step up to Quality.
5.	Analyze assessment and reporting data to	CSO, School	June,	Ongoing		8-1-13: AYP data present on Iowa

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	determine student's annual yearly growth and determine effectiveness of programs	Administrators	2013			Assessments. Regional Directors will monitor schools to ensure that data is utilized.
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**STRATEGIC GOAL # 2 – Build and sustain a culture where educators have an enthusiasm and an invested interest in their professional development**

**Goal #2 – Objective # 1:** Formulate professional development policies for administrators and teachers that ensures their continuous growth in best practices

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1	Develop a Director's position in the CSO for the purpose of guiding professional development for teachers	Superintendent	January 2013	July 2013		1-16-13: Nothing to report; still evaluating potential funding sources. It is unlikely that funds will be available through the office's operating budget. 2-8-13: Actively investigating funding sources and intern opportunities. 5-13-13: Proposing that funding for this position be integrated into upcoming capital campaign. 9-1-13: Funding present in case for feasibility study. 1-24-14: Plan underway for position in the coming year.
2	Form a committee of administrators and teachers to work with CSO staff and university staff on professional development policies	CSO, Advisors, School Administrators	January 2015	June 2015		
3	Implement professional development	CSO, School	June	January		

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	policies	Administrators	2015	2016		
4	Establish an Archdiocesan wide calendar of in-service days for Archdiocese and local school professional development	CSO	June 2012	January 2013 and annually	Carole R.	9-10-12: Draft of days is being developed. 9-24-12: Days tentatively approved for 2012-2013. Will compile into a calendar for communication during Oct. 12-5-12: March date identified for next school year. Archdiocesan calendar has been distributed to schools. 1-16-13: Planning is underway for March 2014 PD day. 4-11-13: Planning is underway for PD for the 2013-2014 school year.
5	Survey principals for individual school professional development needs	CSO	March 2013	Annually		4-11-13: Survey conducted in March. Conversations and research are ongoing. 5-13-13: Discussed PD with PACTS and CSO Staff. Planning underway for next year.
6	Develop and expand strategic academic relationships: XU, UD, training centers	Superintendent, Universities' Schools of Education & Centers for Catholic Education	January 2013	Ongoing		12-5-12: Jim recently met with XU and UD to begin broadening these relationships. 1-16-13: Regular meetings underway with both universities. 5-13-13: UD will be joining XU in support for the New Principals' Academy. 8-1-13: Relationships with UD and XU continue. Utilizing HCESC for high school math curriculum guidelines.

**STRATEGIC GOAL #3 - Ensure that the Archdiocese has a uniform and effective administrator and teacher evaluation system.**

**Goal #3- Objective #1:** Develop, implement and measure the effectiveness of administrators and teachers evaluation programs that are based on Archdiocesan academic standards and professional best practices

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
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1	Assess the effectiveness of the new administrator evaluation program	CSO	Fall 2012	Ongoing	Jim R., Regional Directors	9-10-12: Modifications have been made to the model. We will continue to evaluate this year. 9-24-12: Draft being finalized. 11-8-12: Evaluation sent to principals and pastors. 4-11-13: Evaluations are underway in most clusters. 5-13-13: Aligning evaluation process with proposed Academic Vitality Metric. 9-1-13: Revised evaluation process has been finalized. Will present at Sept. Principals' Meeting.
2	Create committee to develop an Archdiocesan teacher evaluation system that is aligned with state standards	CSO, School Administrators	Fall 2014	Spring 2015		6-5-13: Intending to begin work in the fall of 2014 (adjusted timeline).
3	Implement and measure teacher evaluation system	CSO, School Administrators	Fall 2015	Ongoing		

*Strategic Planning Process*

Domain: Marketing/Enrollment

**STRATEGIC GOAL #1 – Improve Catholic School enrollment and retention rates by identifying, sharing, and implementing best marketing practices.**

**Goal #1 – Objective 1:** Enhance the Catholic Schools Office personnel dedicated to marketing and support CSO personnel with marketing expertise committed to gathering and disseminating marketing best practices.

Step #	Action Step	Assigned to	Start Date	Due Date	SLT	Update
1	Employ a full time CSO Marketing Director	Superintendent	Fall 2012	Spring 2013	Jim R., Chris P.	9-10-12: Will be meeting w/ a potential marketing contractor. Could use school marketing funds to support this. Chris may travel to

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						Chicago to student a “Best Practice” diocese in marketing. 11-5-12: Reviewing proposal for marketing consultant. The plan is to secure the consultant for the spring of 2013. 12-5-12: Marketing contractor has been retained. The contractor was announced and introduced at the 11-29 Principals’ Meeting.
2	Form a marketing advisory committee of experts composed of Catholic school and corporate personnel to advise the CSO Marketing Director on current and future marketing best practices.	Superintendent, Strategic Planning Office	Fall 2012	Spring 2013	Chris P.	9-10-12: Committee has been formed. 11-5-12: Chris preparing to convene committee ahead of elementary recruitment season. 12-5-12: Committee has met, and is connected to the Marketing Contractor.
3	Create a marketing guide on the CSO website that can be used by individual schools. Review and model marketing guide information from other dioceses.	CSO Marketing Director, Marketing Advisory Committee	Spring 2013	Fall 2013		1-16-13: Marketing guide is being reviewed.
4	Present a hard copy binder of the CSO marketing guide to each principal in the Archdiocese	CSO Marketing Director	Spring 2013	Fall 2013		5-13-13: Materials were presented at April 13 principals’ meeting.
5	Maintain contact list of marketing personnel at each school to send periodic communication and updates	CSO	Fall 2012	Ongoing	Chris P.	11-5-12: Chris is nearly finished collected marketing contacts.
6	Provide regular meeting/professional development opportunities for school marketing personnel and Principals per year	CSO Marketing Director	Fall 2013	Ongoing		12-5-12: Plans are being made with the marketing contractor to offer such training. 1-16-13: Training sessions for school personnel took place this month. More sessions to be offered later. 5-13-13: Marketing plan presented at Principals’ Meeting.

**Goal #1 – Objective 2:** Explore the potential for new students among Catholic and non-Catholic families, with a specific focus on publicly funded opportunities and the growing Latino population.

Step #	Action Step	Assigned to	Start Date	Due Date	SLT	Update
1	Obtain data and track how many school-aged children at each parish are attending their own or other Catholic Schools	CSO	Fall 2012	January 2013	Chris P.	9-10-12: Data collection is taking place 11-5-12: Should have data collection completed shortly.
2	Market to families in all parishes that are not currently sending students to Catholic Schools through the CCD or other religious education programs	Pastors, Principals, CSO	Spring 2013	Fall 2013	Mimi L.	2-8-13: Data has been collected and marketing is targeted at these populations.
3	Evaluate areas of potential new schools or programs in the Archdiocese. Engage with local leaders to develop plans to meet emerging potential needs.	CSO Strategic Planning Office	Spring 2013	Ongoing	Chris P.	2-8-13: Conversations are underway with select leaders.
4	Focus marketing on current preschool and kindergarten parents and Non-Catholic families within parish boundaries who could benefit from a Catholic school education	Pastors, Principals, CSO	Spring 2013	Ongoing	Mimi L.	2-8-13: Marketing has been launched targeting these populations.
5	Establish forums where leaders of schools who are currently using Ed Choice vouchers or other scholarship programs can discuss strategies on how best to market to these students	CSO	Fall 2013	Spring 2014		9-1-13: Forums have occurred.
6	Monitor new government programs such as the Jon Peterson scholarship and advise schools on implementation of these programs	CSO Strategic Planning Office, Catholic Conference of Ohio	Fall 2012	Ongoing	Chris P.	9-10-12: Research and advisement is taking place. 11-9-12: In active conversation with the CCO about the outlook of government programs following the recent election. 12-5-12: Met with CSO to define advocacy priorities for upcoming legislative/budgeting session. 2-8-13: In active conversation with CCO, legislators, and school district officials about programs in preparation for the budgeting cycle. 5-13-13: In frequent contact with

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						schools regarding these programs. Advocacy is underway for next budgetary cycle. 8-1-13: Monitoring continues after the passing of the recent budget.
7	Assign a staff position to specifically serve the Latino population who will publish marketing materials in Spanish and ensure that there are Spanish-speaking staff members to help engage interested families	Superintendent, Coordinator of Latino Outreach	Fall 2012	Ongoing	Mayra A.	9-10-12: Latino outreach effort has been expanded for the 2012-2013 school year. 2-27-13: Grant has been submitted for next school year. 8-1-13: Grant has been approved; the position will continue. 1-24-14: Forming grant application for the continuation of position.
8	Partner with groups that already serve the various Latino populations to recruit new students	Coordinator of Latino Outreach	Fall 2012	Ongoing	Mayra A.	9-10-12: Mayra has been in touch with many such groups. Partnerships are developing.

**STRATEGIC GOAL #2 – Develop and coordinate strategic marketing plans.**

**Goal #2 – Objective #1 – Provide marketing consultation and guidelines**

Step #	Action Step	Assigned to	Start Date	Due Date	SLT	Update
1	Develop and communicate the CSO annual marketing plan to all schools by January 1st of each year. This plan will include basic information and timing of Archdiocesan-wide marketing initiatives for the following school year	CSO Marketing Director	Spring 2013	On going	Chris P.	9-10-12: Plan is being formed and is expected to be promulgated on schedule. 4-11-13: Plan is being finalized. Information will be given to principals at the 4-23 Principals' Meeting. 5-13-13: Marketing plan was presented on 4-23. 8-1-13: Marketing plan is being implemented.

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2	Define acceptable marketing practices for elementary schools to protect our common mission	CSO Marketing Director	Spring 2013	Summer 2013		1-16-13: Some practices have been defined and integrated into the revised Archdiocesan Educational Policy. 8-1-13: Marketing practices may be integrated into revised RWB.
3	Continue to implement and monitor the Recruitment Without Boundaries (RWB) agreement between high schools. Review and revise as needed.	CSO	Fall 2012	Ongoing	Susie G.	9-10-12: Monitoring is taking place. Renewal of RWB will need to take place in the springs. 4-11-13: Defining process for RWB renewal. We will re-release the 8 <sup>th</sup> grade database to high schools in early May. 5-13-13: 8 <sup>th</sup> Grade database has been re-released. 6-5-13: Solicited elementary enrollment lists for 13-14 eighth grade database. 9-1-13: Revision of RWB underway.
4	Monitor school marketing communications	CSO Regional Directors, CSO Marketing Director	Fall 2012	Ongoing	Chris P., Susie G.	9-10-12: Some marketing is taking place. Still need an organized system for monitoring. 11-5-12: Monitoring is taking place. Much data has been gathered about high school marketing.
5	Request next year's marketing plan from elementary and high schools on the closing school report due by June 30th of each year. (Change the current school closing report to include marketing planning information).	CSO Marketing Director	June 2013	Ongoing		

**Goal #2 – Objective #2 – Develop and coordinate strategic marketing plans**

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Step #	Action Step	Assigned to	Start Date	Due Date	SLT	Update
1	Develop metrics to evaluate the efficacy of the CSO and individual school marketing plans by June 30th yearly	CSO Marketing Director	Summer 2014	On going		11-25-13: Adjusted from Summer, 2013.
2	Coordinate Archdiocesan marketing and monitor and support individual school marketing.	Marketing Director, Marketing Advisory Board	Fall 2013	Ongoing	Mimi L.	2-8-13: Marketing and monitoring is taking place through Marketing Director.
3	Develop a process to encourage ongoing communication between the CSO and the leaders of private Catholic schools when changes in grade configuration are under consideration (i.e. adding a Pre-K level to an elementary school, or a 7 <sup>th</sup> and 8 <sup>th</sup> grade to a high school, or discontinuing specific grade levels such as eliminating junior high grades at the elementary level).	CSO	Spring 2013	Ongoing		12-5-12: Process has been defined, approved, and promulgated (see Governance)

**Goal #2 – Objective #3 - Develop an archdiocesan wide growth plan to increase enrollment**

Step #	Action Step	Assigned to	Start Date	Due Date	SLT	Update
1	Gather Archdiocesan-level enrollment data; identify trends and specific enrollment growth opportunities such as: capacity availability, opportunities through new tuition assistance sources and potential growth in specific underserved regions.	CSO Strategic Planning Office	6/15	7/15		1-24-14: Data is available through defined metrics.

**Strategic Goal #3 - Establish systems to strengthen a culture whereby parishes provide spiritual and, to the degree that they are able, financial support to parish families with children who desire a Catholic education.**

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**Goal 3 – Objective # 1 – Foster clergy support for Catholic school education.**

Step #	Action Step	Assigned to	Start Date	Due Date	SLT	Update
1	Petition Archbishop Schnurr for a pastoral letter that identifies Catholic education as a ministry priority for all Catholic parishes in the Archdiocese	Superintendent	September 2012	December 2012	Jim R.	9-10-12: Archbishop Schnurr mentioned schools as a priority in his communications (written & verbal) around the vision rollout. Working with him to decide whether an additional pastoral letter is necessary.
2	Identify clergy who actively support Catholic school education and create a plan for them to engage with parishes that demonstrate a concern about the provision of spiritual and financial support for Catholic education.	Archbishop, Auxiliary Bishop, Select Priests	Fall 2012	Ongoing		9-24-12: Jim to meet with Archbishop and Bishop Binzer to discuss. 1-16-13: Clergy have been identified. Outreach will take place to enlist help.

**Goal 3 – Objective #2 – Foster a culture of advocacy for Catholic schools by implementing systems to engage all parishes and parish leaders in active support of Catholic school education.**

Step #	Action Step	Assigned to	Start Date	Due Date	SLT	Update
1	Enhance communication and information sharing from the Catholic Schools Office to all parishes and parish leaders by ensuring that all parishes are included in updates on developments within Catholic School education	CSO Strategic Planning Office	January 2013	May 2013		2-8-13: Preparing to release six-month update of Vision implementation to all parishes and schools. 4-10-13: Vision information released in March. 11-25-13: Preparing for substantive update in January, 2014.
2	Enhance collaboration between the Catholic Schools Office and parish leaders by establishing parish demographic data sharing protocol	CSO Strategic Planning Office	January 2013	May 2013		4-10-13: Updated area demographics are being shared with schools/parishes in conjunction with the Financial Vitality Metric. Such updates will occur at least annually.

## Strategic Planning Report

### Domain: Leadership

**STRATEGIC GOAL #1: Establish a position within the Archdiocese of Cincinnati Catholic Schools’ Office for Professional Development of School Leaders (i.e. Principals, Teacher Leaders, Pastors, and Board Members).**

**Goal #1: Objective 1:** Establish the Director of Professional Development position and formulate a strategic Archdiocesan professional development program for school leaders.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Develop a Director's position in the CSO for the purpose of guiding professional development for administrators and teachers	Superintendent	January 2013	July 2013		1-16-13: Evaluating funding sources for such a position. It is unlikely that funding could come from the office’s operational budget. 2-8-13: Actively investigating funding sources and intern opportunities. 5-13-13: Funding may be included within upcoming capital campaign. 9-1-13: Funding included in case for feasibility study. 1-24-14: Planning underway for position in the coming year.
2.	Review and evaluate current Professional Development program(s) for Catholic School Leaders	CSO	Fall 2012	Spring 2013	Carole R.	9-10-12: Much evaluation has taken place as part of the visioning process. More research may be needed. 4-11-13: Survey promulgated to principals in early March to determine PD needs and solicit feedback. 5-13-13: Planning underway for

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						next year.
3.	Review best practices for leadership development	CSO	Fall 2012	Spring 2013	Carole R., Laura M.	9-10-12: Research is still being performed. 4-11-13: Planning is underway for PD during the 2013-2014 school year.
4.	Identify leadership development delivery systems (mentoring, coaching, traditional classroom, experiential learning, virtual learning)	CSO	Fall 2012	Spring 2013	Carole R., Laura M.	9-10-12: See above
5.	Identify key content for Leadership development (to include instructional, organizational and spiritual leadership development)	CSO	Fall 2012	Spring 2013	Carole R., Laura M.	9-10-12: See above
6.	Develop and implement professional development program	CSO	Fall 2013	Ongoing		9-10-12: See above

**STRATEGIC GOAL # 2: Establish criteria to review the current Principal Evaluation Process.**

**Goal #2: Objective 1:** The Archdiocesan Catholic Schools' Office will develop a formal process for evaluating Catholic school leaders.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1	Assess the effectiveness of the new administrator evaluation program	CSO	Fall 2012	Ongoing	Jim R., Regional Directors	9-10-12: Process has been evaluated and modified. Will continue to monitor. 9-24-12: Draft of revised purpose promulgated to staff. Further revisions taking place. 12-5-12: Revised evaluation process has been promulgated. 5-13-13: Working to align evaluation process with the Academic Vitality Metric.

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2.	Review best practices for Principal evaluation	CSO	Fall 2012	Ongoing	Jim R., Regional Directors	9-10-12: Research is ongoing by SLT.
3.	Develop and implement evaluation process	CSO	Fall 2013	Spring 2014		12-5-12: Evaluation process has been promulgated and is being implemented. 4-11-13: Evaluations are being performed in most clusters. 9-1-13: Revised process completed and will be promulgated at Sept. Principals' Meeting.

**STRATEGIC GOAL #3: Establish criteria to identify potential Catholic School leaders within and outside of the system; with emphasis on recognizing, promoting, and developing administrative leadership among the teacher leaders of our schools.**

**Goal #3 – Objective 1: Create a formal process for identifying, recruiting, and orienting new Catholic school leaders.**

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Review and evaluate current Principal hiring process	CSO	Fall 2012	Spring 2013	Jim R.	9-10-12: Working on revision of Principal Hiring Packet. Working with Cathy B. on pre-screen by the CSO. 11-5-12: Revisions to hiring packet are completed. 2-8-13: Principal Screening by CSO staff has been enacted.
2.	Review best practices for new principal identification and recruitment	CSO	Fall 2012	Spring 2013	Jim. R., Laura M., Carole R.	9-10-12: Some research has been performed in preparation for the New Principals' Academy 11-5-12: Conducted HS AP meeting last week. Planning for additional meeting, as well as Elementary AP meeting. These meetings can be used, in part, to identify potential leaders. 12-5-12: Some aspiring principals

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						in attendance at recent principal in-service. Studying whether to expand New Principals' Academy to identified aspiring principals. 6-5-13: Planning to hold aspiring principal information sessions next school year (separate from New Principals' Academies).
3.	Identify existing resources for leadership formation	CSO	Fall 2012	Spring 2013	Jim R., Laura M., Carole R.	9-10-12: Have researched offerings by local Catholic universities as part of the New Principals' Academy.
4.	Establish a "leadership institute" for new and aspiring school leaders	CSO	Fall 2013	Spring 2014	Jim R., Laura M.	9-10-12: Piloting a New Principal Academy for new principals this year. Have not yet integrated Aspiring Principals. 11-6-12: Gathering impact data on New Principal Academy. 1-16-13: Planning underway for next year's New Principals' Academy. 5-13-13: Academy has been planned and is ready for implementation. 1-24-14: Planning underway for possible institute for aspiring (not current) leaders. Planning also underway for principal information sessions.

**STRATEGIC GOAL #4: Create a formal and ongoing training and development program for current Catholic School Principals.**

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**Goal #4 – Objective 1:** Design an implementation plan for an Archdiocesan Principal Academy will be developed by the Archdiocesan Catholic Schools’ Office.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Review and evaluate current Professional Development program(s) for Catholic School Leaders	CSO	Fall 2012	Spring 2013	Carole R.	9-10-12: Currently evaluating w/ the rest of the CSO staff. 2-8-13: Gathered data on effectiveness of New Principals’ Academy. Will be surveying principals on PD needs in late Feb. 4-11-13: Gathered feedback on PD needs in March survey. 5-13-13: Planning underway for next school year.
2.	Review best practices for leadership development	CSO	Fall 2012	Spring 2013	Jim R., Laura M., Carole R.	9-10-12: Have researched some programs in preparation for the New Principals’ Academy. 4-11-13: Planning for PD is underway for next school year.
3.	Identify leadership development delivery systems (mentoring, coaching, traditional classroom, experiential learning, virtual learning)	CSO	Fall 2012	Spring 2013		9-10-12: See #2 (above)
4.	Identify key content for Leadership development (to include instructional, organizational and spiritual leadership development)	CSO	Fall 2012	Spring 2013		9-10-12: See #2 (above)
5.	Establish Principals’ Academy	CSO	Fall 2013	Ongoing		9-10-12: Pilot of New Principals’ Academy in place for 2012-2013. Will continue to study and refine. 11-25-13: Development underway for substantive Academy for veteran principals.

**STRATEGIC GOAL # 5: Create a formal and ongoing training and development program for current Pastors and future Pastors of Catholic Schools.**

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**Goal #5: Objective 1:** A design and implementation plan for training Pastors and Seminarians will be developed by the Archdiocesan Catholic Schools' Office.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Review and evaluate current Professional Development program(s) and training for Pastors and Seminarians.	CSO	Spring 2013	Fall 2013	Jim R.	2-8-13: Evaluation has taken place. 2-22-13: "Principles of Catechesis", a second-year class for seminarians, will be offered again next year. This course, taught by CSO personnel, includes a heavy focus on Catholic schools. 5-13-13: Planning a brief workshop for new pastors in June on how to support Catholic schools. Still investigating other avenues.
2.	Review best practices for Professional Development program(s) and training for Pastors and Seminarians.	CSO	Spring 2013	Fall 2013		2-8-13: Research is underway.
3.	Identify leadership development delivery systems (mentoring, coaching, traditional classroom, experiential learning, virtual learning)	CSO	Spring 2013	Fall 2013		5-13-13: See #1 (above)
4.	Identify key content for Leadership development	CSO	Spring 2013	Fall 2013		5-13-13: See #1 (above)
5.	Establish development program for pastors and future pastors	CSO	Spring 2014	Ongoing		5-13-13: See #1 (above)

**STRATEGIC GOAL #6: Create a formal and ongoing training and development program for current Board Members and future Board Members for Catholic Schools.**

**Goal #6: Objective 1:** A design an implementation plan for training Board Members of Catholic Schools will be developed by the Archdiocesan Catholic Schools' Office.

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Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Review and evaluate current Professional Development program(s) and training for Board Members.	CSO Strategic Planning Office	Fall 2012	Spring 2013	Chris P.	9-24-12: Research is taking place. Chris is working on establishing common training dates for board and commission members. Could take place in spring, 2013. 2-27-13: Researching structures and training protocols for high school boards. 5-13-13: Finalizing strategy for high school boards. 8-1-13: HS Board study has begun. Analyzing structures & conducting surveys. 11-25-13: Initial consultations with HS principals have been completed; finalizing common set of bylaws. 1-24-14: New bylaws have been formulated. Trainings to take place in late Jan., 2014.
2.	Review best practices for Professional Development program(s) and training for Board Members	CSO Strategic Planning Office	Fall 2012	Spring 2013	Chris P.	See #1 (above)
3.	Identify leadership development delivery systems for Board Members	CSO Strategic Planning Office	Fall 2012	Spring 2013	Chris P.	See #1 (above)
4.	Identify key content for Leadership development systems for Board members	CSO Strategic Planning Office	Fall 2012	Spring 2013	Chris P.	See #1 (above)
5.	Establish professional development program for Board members	CSO Strategic Planning Office	Fall 2012	Spring 2013	Chris P.	See #1 (above)

**STRATEGIC GOAL #7: Provide for ongoing structures of communication, support, and advice for Archdiocesan and School Educational Leaders**

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**Goal #7: Objective 1:** Provide for structure of communication, support, and advice for the Archbishop, Superintendent, and Catholic Schools Office on Educational Matters

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Continue the functions of the Archdiocesan Commission on Education (ACOE). Ensure that geographic regions and various stakeholder groups are represented on this commission.	Superintendent	Fall 2012	Ongoing	Jim R.	9-10-12: Working w/ Ken G. to make necessary changes. Will require affirmative vote from ACOE followed by Archbishop approval. 12-5-12: Recent revisions to ACOE bylaws include structures to maintain geographic representations. 8-1-13: ACOE bylaws revised.
2.	Decommission the Regional Area Commissions on Education. Transition desired functions to the ACOE and Governance Advisory Committee	Archbishop, CSO	Fall 2012	January, 2013	Jim R.	9-10-12: Working with the Chancellor's Office to issue a decree for the Regional Area Commissions. Laura M. & Ken G. will inform these commissions. Will change ACOE bylaws to absorb desired functions. 10-30-12: Archbishop Schnurr has issued decree decommissioning these groups. ACOE bylaws will be adjusted accordingly.
3.	Continue the functions of the Principals' Advisory Committee to the Superintendent (PACTS). Provide concrete bylaws and term limits.	Superintendent	Fall 2012	Ongoing	Jim R.	9-10-12: PACTS will continue this year. Will begin working on bylaws. 11-6-12: Drafted and distributed potential PACTS bylaws. Will review and discuss at next PACTS meeting. 12-5-12: Bylaws have been proposed and discussed. Will present again this month to PACTS with revisions. 1-16-13: Revised bylaws are in

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						place. 6-5-13: Elections for PACTS members taking place.
4.	Research the potential of a Pastors' Advisory Committee to the Superintendent. Implement committee if feasible/desired/warranted.	Archbishop, CSO	Spring 2013	Fall 2013	Jim R.	11-6-12: Consulting with pastors about this concept.

**Goal #7: Objective 2:** Ensure that all schools utilize a functional School Board or School Education Commission.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Research the current presence and functionality of School Boards and Education Commissions in Catholic schools.	CSO Strategic Planning Office	Fall 2012	March 2013		9-24-12: Research is taking place (Chris) 2-27-13: Researching structures and protocols for high school boards.
2.	Establish a common set of constitutions and bylaws for Boards at Archdiocesan High Schools.	CSO Strategic Planning Office	Spring 2013	Fall 2013		5-13-13: Finalizing a study to increase functionality of HS boards. This study will take place during the 2013-2014 school year. 11-25-13: As per HS Board study, common set of HS bylaws defined and awaiting approval.
3.	Modify and implement the Parish Commission Handbook. Monitor Commissions to ensure that they comply with policies.	CSO Strategic Planning Office	Spring 2014	Fall 2015		
4.	Provide emerging research and support for leaders and boards of non-Archdiocesan schools.	CSO Strategic Planning Office	Fall 2014	Spring 2015		

### Strategic Planning Report

Domain: Finances

**STRATEGIC GOAL #1: Create the climate and structures to enable “Unified Support” for the sustainability and growth of Catholic Schools.**

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**Goal # 1 - Objective #1:** Organize and communicate the “Case Statement” describing the value and benefits of Catholic Schools and the reasons why sustainable Catholic Schools are a benefit to all community stakeholders: Catholics, non-Catholics, individuals, companies and organizations.

Step #	Action Step	Assigned to	Start Date	Due Date	SLT	Update
1	Enhance the Existing Draft Document of the Case Statement.	CSO Strategic Planning Office, Marketing Advisory Committee	Fall 2012	December 2012	Chris P., Wayne M.	9-10-12: Much of this work is happening through the re-branding effort.
2	Publish Case Statement and achieve buy-in from potential supporters.	CSO	January 2013	Ongoing		1-16-13: Case statement for funding is being developed in concert with formation of the Archdiocesan Tuition Assistance Fund. It is unlikely that this will be published in January.

**Goal #1 - Objective #2:** Support development, marketing, and promotion of an integrated and unifying “Catholic Schools Brand Image.”

Step #	Action Step	Assigned to	Start Date	Due Date	SLT	Update
1	Create a Catholic Schools Brand Image.	CSO Strategic Planning Office, Marketing Advisory Committee	Summer 2012	August 2012	Chris P.	9-10-12: Brand is developing. Many meetings are taking place w/ lpk. 11-5-12: Brand is complete and is being trademarked. 12-5-12: Brand has been released.
2	Make the “brand” a Centerpiece in Dialogues with Constituents.	CSO Strategic Planning Office, Marketing Advisory Committee	August 2012	Ongoing	Chris P.	9-10-12: Brand elements have been present in meetings and communications. 12-5-12: Beginning to integrate brand into communications. 1-16-13: Brand has been integrated into communications.
3	Create a Unifying Catholic Schools website that allows users to reach all Catholic Schools websites and that communicates the value attributes of all Catholic Schools.	CSO Strategic Planning Office, Marketing Advisory Committee	August 2012	December 2012		1-16-13: Initial planning for website is underway. 11-1-13: New website has been launched.
4	Integrate the Catholic Schools Brand into	Marketing	August	Ongoing	Chris P.	9-10-12: Brand elements are

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	Coordinated Marketing, Recruitment, and Fundraising Efforts.	Fundraising, and Schools	2012			being used in marketing so far. 12-5-12: Brand image being integrated into such efforts. 1-16-13: Brand has been integrated.
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**Goal #1 - Objective #3:** Invite and Coordinate Key Individuals and Organizations to participate in and support the Lighting the Way implementation phase with contributions of *Time, Talent, Leadership, and Passion*.

Step #	Action Step	Assigned to	Start Date	Due Date	SLT	Update
1	Recruit a cadre of Lighting the Way Ambassadors to communicate the ongoing need for Catholic schools.	CSO, Vision Implementation Committee	August 2012	Ongoing		11-6-12: Assembling ambassadors. 12-5-12: Ambassadors will need to be coordinated with the planning for the upcoming Capital Campaign. Working with campaign consultants to define. 2-8-13: Retained fundraising consultant to work with ambassadors and help reach out to donor sources. 1-24-14: Ambassadors including in capital campaign strategy.
2	Orient and coordinate Ambassadors.	CSO, Vision Implementation Committee	August 2012	Ongoing		12-5-12: See #1 (above) 2-8-13: See #1 (above)

**STRATEGIC GOAL #2: Ensure local school financial health, operations and Sustainability by providing data and analysis tools to enhance and support financial decision-making at the local school level.**

**Goal 2 -Objective #1:** Develop Local School Health and Sustainability Metrics to allow schools and parishes to better understand their financial strengths and areas for improvement.

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Step #	Action Step	Assigned to	Start Date	Due Date	SLT	Update
1	Gather specific, current and historical financial data for all parish schools throughout the Archdiocese of Cincinnati	CSO Strategic Planning Office	Fall 2011	Completed	Wayne M.	9-10-12: Much data collection has been completed. 12-5-12: Compiling most recent financial data (FY2012).
2	Using Step 1 Data, pare down the specific measurements to a list of high level financial metrics judged to accurately reflect financial vitality and ongoing viability	CSO Strategic Planning Office	Spring 2012	Completed	Wayne M.	9-10-12: Financial Vitality Metric has been designed.
3	Categorize the high level metrics chosen in Step 2 into 9 specific metrics of vitality and ongoing viability (Enrollment, Tuition, Revenue, Instruction, Administration, Plant, Affordability, Liquidity, Overall). Provide format flexibility to enable ranking all parish schools by Overall metric and by any other Viability Measurement. Use Step 1 and Step 2 data as back up for drill down if required.	CSO Strategic Planning Office	Spring 2012	Completed	Wayne M.	9-10-12: Financial Vitality Metric has been designed.

**Goal 2 - Objective #2:** Support Schools and Parishes in their efforts to be good stewards of their parish and inter-parish shared Catholic School Ministries.

Step #	Action Step	Assigned to	Start Date	Due Date	SLT	Update
1	Present Vitality Metrics to CSO staff, Vision Steering Committee, and parish/school representative stakeholders. Revise as necessary.	CSO Strategic Planning Office	Spring 2012	Completed	Wayne M.	9-10-12: Metric was presented in the spring of 2012.
2	Provide site-specific Vitality Metrics to each school and parish	CSO Strategic Planning Office	Spring 2012	Completed	Wayne M.	9-10-12: Metric was presented in the spring of 2012. 2-8-13: Releasing 2012-2013 metrics to schools. 2-27-13: Metrics have been released to elementary schools.
3	Ensure that Vitality Measurements are updated on an annual basis	CSO Strategic Planning Office	Summer 2012	Ongoing (annually)	Wayne M.	9-10-12: Modifications are being implemented.
4	Assist individual schools in interpreting the Vitality Measurements and identifying opportunities for improvement and best practices.	CSO Strategic Planning Office	Fall 2012	Ongoing	Wayne M.	9-10-12: Responses to questions are ongoing. Will need another round of training with the release of new Metrics this school year.
5	Identify the bottom performing 25% of	CSO Strategic	Fall	Ongoing	Wayne M.	9-10-12: Bottom 25% have been

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	schools based on the Financial Vitality Metrics. Work with local leaders to develop site-specific intervention plans. Identify other vulnerable schools and regions of schools where the data implies a potential or future need for an increase or decrease in school ministry capacity. Coordinate with changes in governance and other strategic planning efforts	Planning Office	2012			identified. Initial meetings are taking place with each of the listed schools. 11-6-12: Consultations are nearly complete.

### STRATEGIC GOAL #3: Increase Private Support to Catholic Schools

**Goal #3 - Objective #1:** Establish a Private, Independent, and Unified Fundraising and Scholarship Foundation that operates in close partnership with the Catholic Schools Office and the AOC.

Step #	Action Step	Assigned to	Start Date	Due Date	SLT	Update
1	Develop a proposed Vision, Mission and Purpose for a unified fundraising and scholarship organization. Determine an appropriate structural alignment with existing archdiocesan fundraising and scholarship organizations such as CISE and Seeds of Growth.	Foundation Implementation Team made up of CSO, Finance Office, Stewardship Office, CISE and Foundation Subcommittee Members	Fall 2012	January 2013	Wayne M.	9-10-12: Forming steering committee to establish the makeup and structure of the fund. 9-24-12: Interviews with prospective committee members are ongoing. Expected to be completed soon (Wayne). 11-6-12: Interviews are complete. Researching other funds in the country. Will issue written report/summary. 12-5-12: Report has been submitted and is being reviewed. 10-1-13: Alignment with other funds is being evaluated as part of campaign feasibility study. 1-24-14: Feasibility study completed.

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2	Determine organizational structure, board structure, and organizational documents. Create legal entity. Determine additional needs for implementation subcommittees. Identify initial board of trustees.	CSO, Foundation Implementation Team, Stewardship Department	Fall 2012	January 2013	Wayne M.	9-10-12: As mentioned in #1 (above), consultations with potential steering committee members are taking place. 11-6-12: Research nearly complete. 12-5-12: Structure has been proposed and is being reviewed. 4-11-13: Structure is still being refined. 10-1-13: Structure is being further defined as part of campaign feasibility study. 1-24-14: Feasibility study completed.
3	Develop initial plans for fundraising, marketing, and scholarship distribution criteria and administration in preparation for annual fundraising, scholarship distribution, and a future capital endowment campaign.	CSO, Foundation Board, Stewardship Department	October 2012	January 2013		11-6-12: Working closely with Department of Stewardship to design process and goals of capital campaign. Additional consultations to take place. 12-5-12: Some initial work has been done with potential consultants. RFP's for consultants have been circulated. Meeting with some significant stakeholder groups to discuss. 4-11-13: Firm has been chosen for feasibility study and campaign. Feasibility study to begin in summer or fall of 2013. 9-1-13: Campaign feasibility study has begun. Will be completed by Dec. 2013. 1-24-14: Planning for campaign underway.
4	Conduct regional fundraising effort. Direct funds to new foundation. Evaluate the potential of future regionally-directed fundraising efforts. Engage with existing regional funding sources.	CSO, Foundation Board, Stewardship Department	Fall 2012	January 2013	Jim R., Chris P., Wayne M.	9-10-12: Conversations are ongoing with the Hubert Foundation about an event in the spring. Early conversations with other foundations about similar efforts. 10-2-12: First planning meeting

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						(late Sept.) went well. Identifying date and location, along with central planning committee. 11-6-12: Numerous meetings have taken place with Hubert Foundation Board members. Date, venue, and many details have been planned. Will apprise pastors and principals ahead of the Nov. 29 Principals' Meeting. 12-5-12: Aug. 10 date and venue have been set. Met with West Side principals, pastors, and business managers on Nov. 29 to discuss. Hubert and Dept. of Stewardship representatives will be meeting with individual school point-people over the next few weeks. 1-16-13: Planning for Hubert/ESAP effort is ongoing. 8-1-13: Hubert/ESAP effort is finalized (no fall event).
5	Secure necessary staff to operate the fund.	CSO, Foundation Board	Spring 2013	Summer 2013		11-6-12: Staff needs are being defined as capital campaign planning proceeds (see #3, above)

**Goal 3 – Objective #2:** Initiate and coordinate an Archdiocesan capital campaign to generate funds for Scholarship Foundation.

Step #	Action Step	Assigned to	Start Date	Due Date	SLT	Update
1	Plan for capital campaign. Develop Feasibility Study, Goals and Objectives, Operating Budget, Planning Budget, etc.	CSO, Foundation Board & Staff, Stewardship Department	Fall 2013	Spring 2014		11-6-12: Working closely with Department of Stewardship to design process and goals of capital campaign. Additional consultations to take place. 12-5-12: Additional meeting has occurred. Expect to have consultants secured in spring to define goals, plan, budget, etc. 4-11-13: Firm is being retained for the campaign. Planning

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						continues. 9-1-13: Feasibility study for campaign is underway. 1-24-14: Study is completed. Active planning underway for campaign.
2	Recruit volunteer solicitors	CSO, Foundation Board, Stewardship Department	Spring 2014	May 2014		1-24-4: Solicitors being recruited during planning for campaign.
3	Initiate and conduct a unified capital campaign for Catholic School Scholarship Foundation	CSO, Foundation Board & Staff, Stewardship Department	Fall 2014	Spring 2015?		
4	Support Fund through Annual Fundraising and additional fundraising events.	CSO, Foundation Board & Staff, Stewardship Department	Spring 2015	Ongoing		

**Goal #3 – Objective #3:** Coordinate for Maximum In-Kind Support from individuals and corporations on implementation efforts.

Step #	Action Step	Assigned to	Start Date	Due Date	SLT	Update
1	Identify Sources for In-Kind Support.	CSO, Foundation Board	Spring 2013	Fall 2013		1-16-13: Such sources are being defined as part of the fund planning. 1-24-14: In-kind support being considered in campaign planning.
3	Solicit In-Kind Supporters and Volunteers.	CSO, Foundation Board	Spring 2013	Fall 2013		4-11-13: In-kind solicitations included in RFP for capital campaign. 1-24-14: In-kind support being considered in campaign planning.

**STRATEGIC GOAL #4: Optimize the Use of Archdiocesan and Public Finance Resources.**

**Goal #4 – Objective #1:** Optimize the Use of Archdiocesan Resources

Step #	Action Step	Assigned to	Start Date	Due Date	SLT	Update
1	Inventory and evaluate underutilized assets for repurposing or reinvestment into the	CSO Strategic Planning Office,	Fall 2012	Spring 2013		11-6-12: Assessment is taking place in tandem with the capital

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	Catholic Schools Ministry	Finance Office				campaign planning.
2	Evaluate the allocation structure of the Catholic Ministries Appeal to determine whether Catholic schools should be additional beneficiaries. Incorporate Catholic Schools into the Appeal if possible/warranted/desired.	CSO Strategic Planning Office, Finance Office, Stewardship Office	Spring 2013	Fall 2013		4-11-13: CMA structure will be evaluated as part of the upcoming feasibility study for the capital campaign.
3	Evaluate the possibility of offering some forms of CSO or archdiocesan services and support on an at cost fee basis.	CSO Strategic Planning Office, Finance Office	Spring 2013	Fall 2013		2-8-13: School assessment changes have been considered and have been vetted with PACTS

**Goal #4 – Objective #2:** Identify most efficient and effective Roles, Responsibilities, and Services to be provided by CSO and other archdiocesan offices.

Step #	Action Step	Assigned to	Start Date	Due Date	SLT	Update
1	Offer centralized support services in areas where local efforts are inefficient, infrequent, or lacking expertise and experience.	CSO Strategic Planning Office	Fall 2012	Ongoing	Wayne M.	9-10-12: Archdiocesan consolidated purchasing was introduced this fall. Working with a steering committee of business managers to determine the long-term future of this effort. 5-13-13: Planning for this program is underway for next school year. 6-5-13: Parishes and schools invited to participate in the fall. 8-1-13: Transitional purchasing program (COPE) to the management of the PBMA.
2	Consider or expand centralized procurement cooperative efforts.	CSO Strategic Planning Office, Consolidated Purchasing Committee	Fall 2012	Spring 2013	Wayne M.	9-10-12: See above.
3	Support and share best practices relative to cost control and effective use of assets and resources.	CSO Strategic Planning Office	Fall 2012	Ongoing	Wayne M.	2-8-13: Plans for program expansion of cooperative purchasing efforts through COPE.
4	Implement common financial reporting system in parishes and parish schools.	Finance Office	Fall 2012	Spring 2014	AoC Finance Office	9-10-12: ParishSoft Pilot is underway. Plans are moving forward to expand program on

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						schedule.
5	Encourage innovation in technology and other instructional methods as means to improved instruction and potentially lower net cost of instruction.	CSO Strategic Planning Office	Spring 2013	Ongoing		12-5-12: Energy Efficiency Coordinator recently presented to principals to discuss the benefits of this program.

**Goal #4 – Objective #3:** Optimize school use of funds from the State of Ohio

Step #	Action Step	Assigned to	Start Date	Due Date	SLT	Update
1	Collect and analyze historical usage of State auxiliary funding and develop recommendations for best practices.	CSO Strategic Planning Office	Spring 2013	Ongoing	Chris P.	2-8-13: Initial Analysis of a sampling of schools has been conducted
2	Expand training opportunities for school leadership on best practices and administration of government programs	CSO Strategic Planning Office	Spring 2013	Ongoing	Chris P.	2-8-13: Ongoing part of principal meetings and covered in New Principals training
3	Initiate and develop relationships with local educational agency programs personnel and 3 <sup>rd</sup> party contractors	CSO Strategic Planning Office	Summer 2013	Ongoing	Chris P.	6-5-13: Vendors have been identified, and we are developing relationships.
4	Lead discussions about best practices in regard to the EdChoice, Jon Peterson, Transportation, and Autism scholarship programs and monitor program changes as they occur.	CSO Strategic Planning Office	Fall 2013	Ongoing	Chris P.	6-5-13: Communication with schools is ongoing about the use of these programs. Efforts will be ongoing.
5	Monitor and apply for State grants to address individual school needs	Director of Resource Development	Fall 2013	Ongoing	Chris P.	6-5-13: Monitoring and application is taking place.

**Goal #4 – Objective #4:** Optimize school use of funds from the Federal Government

Step #	Action Step	Assigned to	Start Date	Due Date	SLT	Update
1	Collect and analyze historical usage of federal funding programs and develop recommendations for best practices. Programs to include: Title I, IDEA-B, Free and Reduced lunch, Title III	CSO Strategic Planning Office	Spring 2013	Ongoing	Chris P., Mary Beth M.	9-10-12: Detailed records exist. Still need to make recommendations for best practices. 9-1-13: “Informal” list of best practices developed. Study ongoing.
2	Analyze use of Title IIA consortium funds and create an annual plan to maximize effectiveness	CSO Strategic Planning Office	Spring 2013	Ongoing	Chris P.	9-10-12: Analysis has been performed. Plans are developing.

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3	Expand training opportunities for school leadership on best practices and administration of federal programs	CSO Strategic Planning Office	Spring 2013	Ongoing		2-8-13: Training offer as part of principal meetings and covered in New Principals training
4	Lead discussions about best practices in regard to Title I, IDEA-B, Free and Reduced lunch, Title III programs and monitor program changes as they occur.	CSO Strategic Planning Office	Spring 2013	Ongoing		2-8-13: Programs are monitored and updates are shared through principals bulletin
5	Monitor and apply for Federal grants to address individual school needs	CSO Strategic Planning Office	Spring 2013	Ongoing	Wayne M., Sue K.	5-13-13: Work ongoing to monitor and access federal grants.

**Goal #4 – Objective #5:** Increase lobbying efforts to legislators on behalf of Catholic school issues

Step #	Action Step	Assigned to	Start Date	Due Date	SLT	Update
1	Advocate for cost of living adjustments for the Ed Choice program	CSO, Catholic Conference of Ohio	Fall 2012	Ongoing	Jim R., Chris P.	9-10-12: Working in concert with the Catholic Conference of Ohio. 12-5-12: This has been identified as an advocacy priority for the upcoming legislative term. 2-8-13: Advocacy is underway. 7-1-13: Not included in last budget bill. Advocacy continues.
2	Leverage Ohio Advocates for Catholic Schools (OACS) network to communicate with school parents and other stakeholders about legislative issues that impact Catholic schools	CSO, Catholic Conference of Ohio	Spring 2013	Ongoing		5-13-13: OACS has been tapped for advocacy efforts. May be more heavily utilized as budgetary debate continues.
3	Monitor and advocate for changes and/or additions to government programs	CSO, Catholic Conference of Ohio	Spring 2013	Ongoing		2-8-13: Monitoring and advocacy are underway. 6-5-13: Monitoring and advocacy continues during final stages of budgetary debate. 7-1-13: Some positive changes present in budget bill. Advocacy will continue.

## Strategic Planning Report

### Domain: Governance

**STRATEGIC GOAL #1 – Develop, cultivate, and sustain successful and innovative models of governance for K-12 Catholic education in the Archdiocese of Cincinnati that will allow the mission of Catholic education to thrive.**

**Goal #1 – Objective #1:** Design a forum for communication between stakeholders and people leading the implementation of the strategic vision to ensure that decisions related to governance involve leaders from representative stakeholder groups (CSO, principals, clergy, finance, marketing, strategic planning, academic excellence, Catholic identity).

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Re-assign the responsibilities of the current position of Director of School Strategic Planning, Marketing, and Government Programs into two positions. <ul style="list-style-type: none"> <li>• Position 1: Director of School Strategic Planning and Government Programs</li> <li>• Position 2: Director of Marketing and Enrollment</li> </ul>	Superintendent	Fall 2012	January 2013	Jim R., Chris P.	9-10-12: Researching the possibility of retaining a marketing contractor. Conversation and research is ongoing. 11-6-12: In active negotiations with a marketing consultant that would function as Director of Marketing. 12-5-12: Marketing contractor has been secured. Split of responsibilities has occurred.

**Goal #1 – Objective #2:** Define and explain the governance (authority, responsibility, role, structure) for each of the existing and new models of governance for Catholic schools.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Form a Governance Advisory Committee to modify and finalize governance charts for elementary and secondary schools.	Superintendent, CSO Strategic Planning Office	Fall 2012	January 2013		9-24-12: Governance models have been reviewed and approved. A non-exhaustive list has been defined.
2.	Share a draft of these documents with priests,	CSO	January	March		12-5-12: Draft has been shared.

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	principals, and other relevant stakeholders for input.		2013	2013		
3.	Use the input received from the stakeholder groups to prepare final documents.	CSO Strategic Planning Office	March 2013	June 2013		12-5-12: Input has been received.
4.	Present these documents to principals and pastors.	CSO	August 2013	November 2013		12-5-12: Draft document was presented at 11-29 Principals' meeting.
5.	Include these document(s) in all relevant CSO communications and policy manuals/documents.	CSO Strategic Planning Office	November 2013	Ongoing		12-5-12: Governance models have been integrated into revised educational policy. 1-16-13: Governance models in use.
6.	Review the governance charts annually with the Governance Advisory Committee	CSO Strategic Planning Office, Governance Advisory Committee	November 2013	Ongoing		

**Goal #1 - Objective #3:** Create a proactive long-range planning process to assist schools in making governance decisions.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Develop Vitality Metrics in the areas of Academic Excellence, Catholic Identity, Finance, and Enrollment.	CSO	Fall 2012	January 2013	SLT Staff	9-10-12: See other areas for updates. 11-6-12: See other areas for updates. 12-5-12: See other areas for updates. 4-11-13: See other areas for updates. 11-25-13: See other areas for updates. 1-24-14: See other areas for updates.
2.	Present drafts of the Metrics to various committees and stakeholder groups for review and feedback and then prepare a final draft.	CSO	January 2013	March 2013		1-16-13: Academic and Financial Metrics are being vetted. Catholic identity c metric will be vetted once a draft is complete. 11-25-13: See other areas for updates.
3.	Present a report with the final draft of the	CSO	Spring	Spring		5-13-13: Adjusted timeline from

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	Metrics to the Archbishop for review and feedback.		2014	2014		March, 2013 to Spring, 2014.
4.	Present the Metrics to pastors and principals	CSO	Spring 2014	Spring 2014		5-13-13: Adjusted timeline from March, 2013 to Spring, 2014. 1-24-14: Catholic ID metric to be presented at Feb. principals' meeting. Academics at April meeting.
5.	Review the Metrics yearly and meet yearly with principals and pastors to discuss the Metrics for their schools.	CSO	Fall 2014	Ongoing		
6.	Review these Metrics yearly and update as needed.	CSO	Fall 2014	Ongoing		
7.	Provide the schools not meeting the benchmarks with planning support from the CSO which may include recommendations for a change in governance structure.	CSO	Fall 2014	Ongoing		
8.	Provide assistance, support and direction to schools and parishes desirous of change or in need of a change in their current governance model.	CSO	Fall 2014	Ongoing		

**STRATEGIC GOAL #2 – Develop the capacity of people with the authority to make governance decisions and policies in Catholic schools.**

**Goal #2 – Objective #1:** To provide transition support to Catholic schools during the process of a change in governance.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Formulate a streamlined process for schools to change their governance models.	CSO	Fall 2012	December 2012	Chris P.	9-10-12: Draft of process has been developed and is being refined. Expect to have a copy before the Archbishop shortly. 11-6-12: "School Change Process" has been designed, reviewed, and approved by the

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						Archbishop. Will distribute to pastors and principals shortly. 12-5-12: Process has been distributed to pastors and principals. 1-16-13: Process actively in use for defined changes taking place in schools.
2.	Present the process for a change in governance model to the Archbishop for input and approval.	CSO	January 2013	March 2013		11-6-12: Governance change process has been approved.
3.	Communicate this process to all relevant personnel and stakeholder groups.	CSO	March 2013	Summer 2013		12-5-12: Process has been distributed to pastors and principals.
4.	Designate members of a Transition Team that assists schools when enacting changes in governance. Provide training for Transition Team members.	CSO	Summer 2013	Ongoing		4-11-13: Transition team for closing school has been formed and is working.
5.	Implement governance change process (including Transition Team)	CSO	Fall 2013	Ongoing		8-1-13: Transition process was initiated for changes last school year. Process continues to be used.
6.	Review and update materials yearly.	CSO	Spring 2013	Ongoing		7-1-13: Process was reviewed. Reviews will continue in the future.

**Goal #2 - Objective #2:** Establish a support process for schools and/or parishes in the hiring and evaluation of principals.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Develop a required screening process through the Catholic Schools Office for principals new to the Archdiocese.	CSO	Fall 2012	December 2012	Cathy B.	9-10-12: Researching practices in other dioceses. Putting together a proposal (Cathy). 9-24-12: Cathy in touch with other dioceses about similar processes. 12-5-12: Proposal of process has been put together and is under review. 1-16-13: Process has been approved and is in use.

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2.	Update and promulgate the Principal Hiring Packet	CSO	Fall 2012	December 2012	Jim R.	9-10-12: Some changes taking place. Waiting for the outcome of Action Step 1 (above). 11-6-12: Principal Hiring Packet has been updated.
3.	Develop a common evaluation tool for the hiring agent for evaluating principals.	CSO	Fall 2012	December 2012	Jim R.	9-10-12: Some tools are available in current hiring packet. Will refine as new process develops. 11-9-12: Principal evaluation process has been revised and distributed. 5-13-13: Aligning evaluation tool with the Academic Vitality Metric. 9-1-13: Evaluation process revised; will be presented at Sept. Principals' Meeting.
4.	Update the evaluation process, hiring pre-screening procedures, and interview materials yearly, as needed.	CSO	Spring 2013	Ongoing		1-16-13: Process has been updated for current year.

**Goal #2 - Objective #3:** Establish a process and a policy for the non-renewal of principals and a clearly defined Problem Resolution process and policy.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Create a process and a policy for the non-renewal of principals that includes the input and involvement of the Catholic Schools Office and Human Resources Office.	CSO, Human Resources Office	Fall 2013	Spring 2013	Jim R.	5-13-13: Adjusted timeline from Spring, 2013 to Fall, 2013. 9-1-13: Process in development. Expected to be complete in Dec. 2013.
2.	Develop a Problem Resolution process and policy specifically to address issues related to the non-renewal of principals.	CSO, Human Resources Office	Fall 2013	Spring 2014	Jim R.	5-13-13: Adjusted timeline from Spring, 2013 to Fall, 2013. 9-1-13: Process in development. Expected to be complete in Dec. 2013.
3	Present these processes and policies to the Archbishop for his feedback, make necessary changes, and request a letter from the Archbishop supporting the final documents.	CSO	December 2014	January 2015	Jim R.	
4	Include these policies and an explanation of	CSO	January	March	Jim R.	

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	both processes in the Educational Policy Manual, Human Resources Policy Manual, and Priest Personnel Manual		2015	2015		
5	Present these documents to pastors, principals, presidents, and boards.	CSO	March 2015	May 2015	Jim R.	
6.	Review and revise the non-renewal process and policy.	CSO	Fall 2015	Ongoing	Jim R.	

**Goal #2 - Objective #4:** Provide and/or continue to provide updated governance support documents for schools.

Step #	Action Step	Assigned To	Start Date	Due Date	SLT	Update
1.	Provide and/or continue to provide governance support documents and drafts of governance support documents for schools.	CSO	Fall 2012	Ongoing		12-5-12: An overview of governance models was presented at the 11-29 Principals' Meeting
2.	Revise Archdiocesan Educational Policy regularly. Provide a hard copy of Archdiocesan Educational Policies to every principal on a basis of at least every three years.	CSO	Spring 2013	Ongoing		12-5-12: Policy has been revised. Hard copies to be mailed shortly. 1-16-13: Hard copies have been mailed to principals, presidents, and school pastors.
3.	Revise the Education Commission Handbook. Revise this Handbook regularly.	CSO	Fall 2014	Ongoing	Chris P.	5-13-13: Adjusted timeline from Spring, 2013 to Fall 2014.

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