

PROJECT 20/20

A STRATEGIC PLAN FOR HOLY ROSARY SCHOOL IN WEST SEATTLE

FOR THE YEARS

2013-2014

2014-2015

2015-2016

2016-2017

2017-2018

2018-2019

2019-2020

A PRINCIPALS WHITE PAPER

BY

GEORGE HOFBAUER AUGUST 21, 2013

-----DRAFT THIRTEEN-----

“It is for lack of a vision that a people perishes.”

PROVERBS

A Strategic Plan consists of a reflection on the past and a plan for the future. An institution's Centennial is a perfect time to initiate a project like this. There is no one way --- no perfect way to do a strategic plan. Ideally they take place over a two or three-year period. But an institution is forced to deal with the constraints, pressures, and realities it has. That is why this initiative will be completed in a 14-month period starting in April of 2013.

The constraints, pressures, and realities deal with, for the most part, financial pressures and a perceived lack of understanding of structural processing. Hopefully this will become apparent in this “Principal's White Paper”.

What is a “Principal’s White Paper”? It is the beginning of a strategic plan. In this paper I, as the “Head of the School” will attempt to build a case for and understanding of a list of recommendations that I will be making. These recommendations come out of some anecdotal observations that I have made during discussions with leadership individuals, parent meetings, staff meetings, reviews of test scores, and studying financial statements for both the parish and the school. I am writing this paper from a “first person” perspective. That is important to stress because I have simply not been around Holy Rosary that long. I have, however been involved in Catholic Education for over forty years. During that time I have worked at O’Dea, Saint Joseph, Saint Leo in Chicago, with the National Catholic Education Association, the Rainbow Schools, Fulcrum, and the Archdiocese of Seattle. So I do have some experience with the system, and I see some very basic similarities in schools and their histories and evolution ---- or lack thereof.

These recommendations will be shared with parents and posted on our website. Individual parents can voice their positions to Parent Association officers. They can state if they are in favor of the recommendations or against them. They can even make their own recommendations. The Parent Association officers, however, officially vote on the recommendations after receiving input. They may, or may not add other recommendations that are suggested by individual parents. Parent Association Officers, whom I assume, have a better understanding of the day -to -day flow of the school, are bound only by their own consciences in making their decisions.

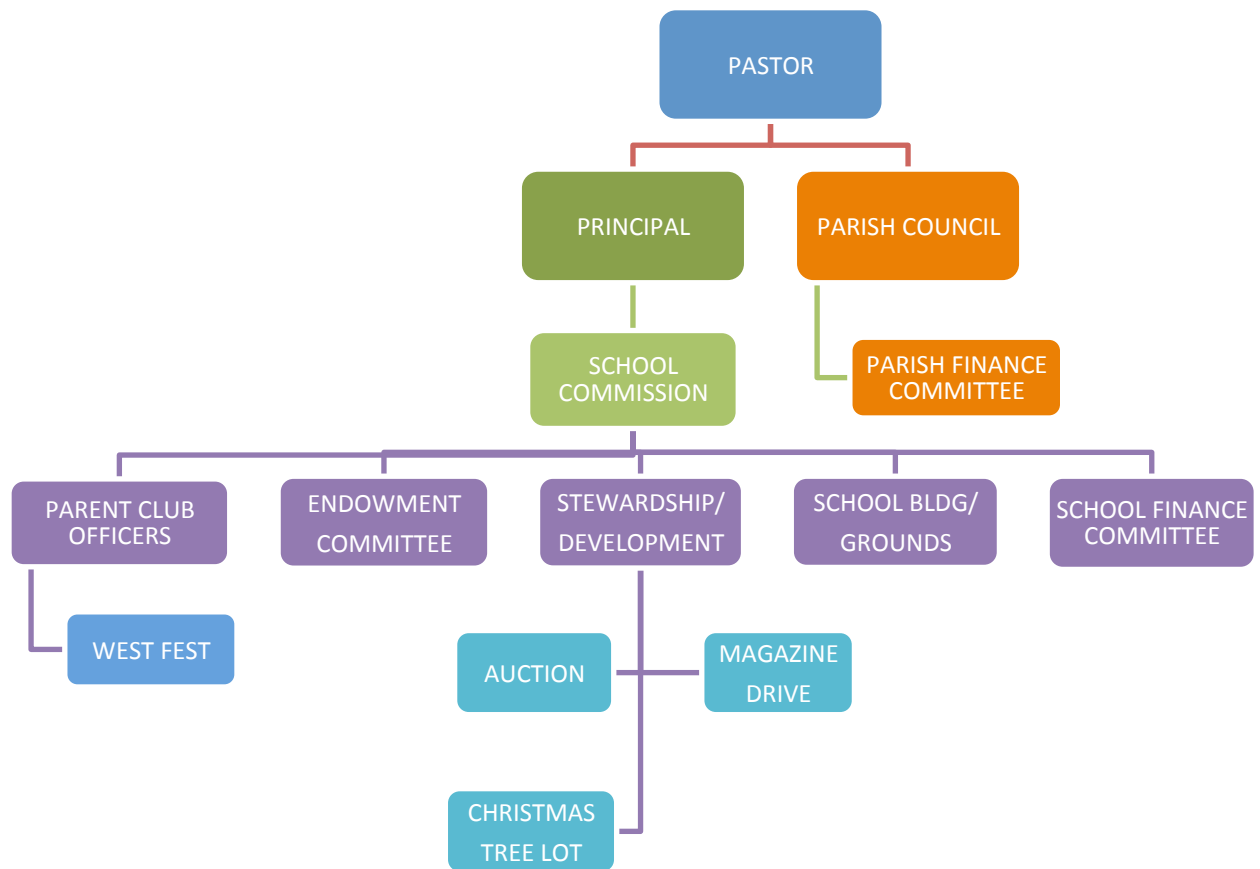
The Parent Association decisions are then sent to the School Commission which may or may not add their own recommendations. The School Commission makes the final decisions, which are then handed to the Pastor for acceptance or rejection.

This same process takes place with the staff of the school. In their case, however, they vote on the recommendations and decide if they want to add new ones, which they also vote on. I will be present for the explanation of the motions and plan, but the Vice-Principals will coordinate the anonymous voting and simply give me the totals. Parent Officers can vote on them, but all of theirs, meaning the staff, which have been passed by the staff, are forwarded to the School Commission.

Governance at Holy Rosary is a little bit confusing to me. There are many **“cooks in the kitchen”**, and each seems to be the **head chef**. That creates obstacles to understandable and explainable processing procedures for decision making. In my humble opinion this, in turn, leads to confusion and often to the lack of decisions being made and/or adequately publicized to the community.

I believe there must be, at least, a casual observation of “Roberts Rule of Order”, and decisions must be written out when they are formally proposed and voted on. They are then moved thru the structure in an appropriate way. The school, by itself, is after all about a \$3 million business with over 50 staff. When you add the Church on it is over \$4 million with around 60 staff.

I have therefore created the following “Organizational Flow Chart” to clarify the way I see things, and therefore the way I am processing decision making activity:



THE PAST

Like all Catholic Schools in America that started 100 or more years ago, Holy Rosary was started shortly after the parish began. The idea in the 1800 and 1900's was to have a parish start, and once it was established to have a parish school begin. An order, usually of nuns, was recruited to run the school. In the case of this institution, it was the Dominican Sisters of Tacoma. They were one of the major orders serving this Archdiocese.

A few priests staffed the parish. The nuns took care of the school, and even worked in the parish on Saturdays and sometimes on Sundays. They cleaned. They organized. They taught religion to the children who were attending public schools. The Catholic system had a perfect recruiting method for the parish school. If you wanted your children to go to Heaven then send them to the Catholic School, and the School was free. The Church could afford to do this because the School was the only major activity that had to be paid for, and the nuns, and the priests at that time cost next to nothing. So the donations to the parish pretty much went to the school and general parish upkeep. Books did not change. Curriculum did not change. Approaches to teaching did not change. There were no technology costs. Buildings were relatively new thus lacked huge maintenance costs. There was no understanding of ----- or belief in --- the necessity to put aside money for deferred maintenance costs.

The late 1960's unleashed huge changes in American society, and in the Catholic Church. They were not planned for. They were not foreseen. They were not even understood at the time. The Catholic Church, which is, by nature, slow to change, was caught completely off guard. Entrance to religious life began to drastically decrease. Many who were in religious life left or saw their ministry being something other than teaching. This greatly impacted the schools. And finally an exodus from membership in the Catholic Church started to begin. Some who remained became "Cultural Catholics" which has come to mean they were not financially supportive and CEO's (Christmas and Easter Only). Yet they saw themselves as Catholics and nobody, in their mind, could say they were not. Hence, still there was the expectation for funerals, weddings, baptisms ---- the services of the Church in their time of need.

This meant a decreasing number of religious had to do more. Lay people had to be hired to teach and to work in the parish. And many of those the Church served went from parishioners and parents to "Consumers". And these consumers became more questioning and judgmental. This meant more time was demanded on their part.

During the 1800's and early 1900's Catholics and parish members were seen as "Disciples". They bought into everything wholeheartedly. They did not question. They partnered as followers. Governance was far less complicated. This change from "Disciple" to "Consumer" is complicated and challenging. It is ironic that at the same time this is happening to us there has been a dramatic increase in individuals joining Charismatic and Fundamentalist Christian Churches. And many of these joiners are X-Catholics!

At first “mothers” were hired as teachers in Catholic schools. They took the place of disappearing nuns, brothers, and priests who had been in the classroom. Some were not even college graduates. They were paid very little. And this was acceptable because it was nice extra income but not really necessary. By the early 1980’s America began to enter a time when two adult incomes were needed, and they had to be “real incomes”. Tuitions had begun in the 1950’s but they were extremely low. They started to escalate.

At the same time parishes were asked to take on more and more programs, and they also had to hire lay staff to do it. This started to put a real stress on Church finances. The parish, which was the major support to the school, was receiving less and less in real dollars while more and more was needed by the school and the parish. Not only did Catholic institutions have to pay salaries ----- eventually they also had to provide a benefit package. The increase in the cost for this escalated way beyond normal inflationary realities ---- and still does.

Tuitions never kept up with these increasing demands. In the good economic times in Seattle sometimes slight increases took place, but certainly not on par with the CPI. In the bad times, no increases took place, and they were never made up for.

During the 1970’s Holy Rosary even started a High School for girls. It was a very expensive undertaking and the parish heavily funded it. But, as was mentioned earlier, this was the time during which religious vocations started to plummet, and many who remained in religious life decided God was calling them to do something else so they left teaching. It was also the beginning of a decline in financial support and Church attendance. The result was the closure of our High School for young women after a very short life. And the property was sold. It is now a Lutheran School with a tuition of over \$10,000.

We are now entering a time when schools must take care of their buildings and grounds. The parish can no longer afford to do it. Holy Rosary, like many schools, is coming into a time when expensive expenditures for an aging building will have to take place. The building is just getting to that point, but no realistic reserves have been set aside for this. Financing the future of the school has become a growing challenge.

“Those who fail to plan ----- plan to fail” Peter Drucker

FINANCE

It seems like everything is connected to finance. You cannot do what you are not able to afford, yet there are things you must do if you are to continue to exist. I had one parent tell me that there were some who wanted to turn Holy Rosary into an “elitist private school.” I had replied that I doubted that, and that I was sure no one had used that terminology. What is usually meant by this statement is that some individuals realize that the tuition must be drastically increased over a short period of time.

Drastic means different things for different people. And any substantial increase in tuition must be accompanied by increases in financial aid. But to do this, some perceived commandments of Catholic education must be broken. These are not contained within the formal ten we have. These are not

sanctioned by any formal body of the church, but they are well known (sometimes even better than the original ten) and held onto tightly and defended dearly by many. They are:

- Commandment 11: Thou shalt have in-parish and out- of -parish tuition.
- Commandment 12: Thou shalt have a family plan for tuition.
- Commandment 13: Thou shalt not charge enough tuition to cover the cost of education.
- Commandment 14: Thou shalt have a parish subsidy that is equally given to all and not need- based.
- Commandment 15: Thou shalt have the parish take care of all the building needs of the school.
- Commandment 16: Thou shalt have a candy sale to support Catholic schools.

Well, at least Holy Rosary has broken commandment 16, but I hope to help you break commandments 11, 12, 13, 14 and 15 as well.

The Family Plan/ In Parish Tuition/ Catholic/ Non-Catholic Tuition

I do not think the family plan is Gospel-based. Do we really think that Jesus would say that those who have more children should pay less? Or would he say those who have the greatest need should pay less? Do we really believe that Jesus would say that the single minority parent who is not a Catholic should pay more tuition than the two-income family with a much higher net income who happen to belong to Holy Rosary Church? Does Saint Vincent DePaul run this way? Do our food banks or shelters run this way? Are those who come to the door of the rectory in need treated this way? Catholics, who are members of the parish, come first. The rest wait.

Does membership in the Catholic Church mean the same thing it did 50 years ago? I think not. Studies reveal that it does not. Church income and attendance indicates that it does not. Most Catholics are Cultural Catholics. The average Catholic comes to Church once a month. And many are CEO's ---- Christmas and Easter only ---- or maybe just CO's! And I write this as one who financially supports the Church regularly and more than the norm, and one who goes to Mass almost every day. But I am realistic. I am also pragmatic.

Two looming problems I see at Holy Rosary School deal with the fact that there is not enough tuition income to cover even the salaries and benefits of the staff. And there is no real reserve fund built up for major repairs, or even the funding of sick banks. This means that no money has been set aside for any long-term sickness, pregnancies, (in which both fathers and mothers are entitled to leaves), or issues that demand Administrative leave. And there is not enough money being budgeted to take care of the normal needs of the school in this area. Teachers are employees who need someone to

there to take their place when they are out. You cannot simply say, "OK students, take care of yourselves for the day your teacher is out" ---- no matter how much they might like that option. Even the front office, for safety reasons, must have someone at that station. Mary Simpson and I recently calculated that the school owes a large number of days to its staff as sick leave. At the average pay per day that a short-term substitute teacher costs at Holy Rosary that would be a bank of approximately \$320,000. This is really not computing in the anticipated increased pay for per diems as the years go by. If the institution must hire long-term substitutes for pregnancy or major medical issues, that could easily increase to at least \$400,000. What do we have in a reserve account to address this? We have nothing. We have not even been realistically budgeting for normal yearly sick bank use or for replacement of staff when there is an important learning workshop for them to attend. Now, it is true that the money is not owed unless it is used, but it is better to be prepared than unprepared. And besides, once that money is stored up the school can have a "quasi-endowment" where the interest is used for financial aid.

Another major challenge is that the Parish cannot afford the subsidies it is giving to the school. The amounts are increasing while the income of the parish is not keeping up with the actual expenses of the parish. And the subsidies simply cover whatever the school is not able to pay. This is an antiquated system of dependence. The parish, with a much smaller budget than the school cannot be expected to be a cash cow for the school. There comes a time when a parent has to tell their 40-year- old child to move out of the basement and pay their own bills. Only in this case ----- we are 100 years old!

Finally, it does not seem like adequate additional tuition increases were added in as extra staff were added to the school. Spanish, music, art and classroom aides were all additions that substantially increased the cost over the years, but it does not seem that they were properly budgeted for. We must keep in mind that enrichment courses like these do not have any additional class of students generating tuition and as time goes on they become more and more expensive. These programs are good and important, but they have to be paid for or removed. As a position is added on the position must be increased by an extra percent or two, on top of the normal increase, which should, at this point, be around 5%. And when tuition increases less than it should ----- there must be subsequent (one time) make-up increases on top of the normal increase. And believe me tuition has not been increasing at the rate it should be increasing.

As tuitions were being set, it does not seem to have taken place within the context of a long-term plan. They were simply set yearly. No thought was given to enrollment declines, or increasing need for financial aid, which, in some cases was simply unpaid tuition. Thus far, I cannot find a record of how much financial aid was distributed each year, both in terms of actual dollars and in terms of "tuition remission" which is simply unpaid tuition. That number is really a target number for Endowment Income.

With higher tuitions there has to be more financial aid. So where does that come from? Well there are four basic areas:

A. Tuition

- B. Subsidy
- C. Development
- D. Endowment

“He who is afraid of doing too much always does too little.” German Proverb

Tuition pricing has to be more realistic. And those in need must be taken care of. The first child’s tuition cannot be less than the cost of education ----- it has to be more because it helps provide extra funds for those who cannot pay the full cost. Actually the same thing takes place with airplane tickets, and so many other business realities. . The first child’s tuition must be more if there is to be substantial discounting for those on a family plan. For better or worse, financial re-distributions both as income and expense are realities of life.

If someone is a Catholic, that does not mean they are either entitled to or should be paying a lower tuition. This again, does not seem to be in accordance with the Gospel. In the Sermon on the Mount I do not believe Jesus said, “OK, you who are believers come first and eat for free, the others have to pay.” Again, here, I believe that it is simply a matter of those who can pay, should pay, and those who cannot ----- should not. Low tuition is at the cost of poorly paid staff, deteriorating buildings and grounds, inferior curriculum materials, questionable safety practices and protocols, and inadequate technology programs.

I also wonder how many Catholics on in-parish tuition payment schedules are truly “tithing”, (and continuing to do so once their last child has graduated from the school) and going to mass every Sunday, and fully practicing and following ALL the demands of the Catholic faith. Do we, I wonder, sometimes encourage people --- even God forbid --- children to be disingenuous?

Recommendation: One

Starting with the year 2018-2019 abandon in-parish and out- of- parish tuition and Catholic and non-Catholic tuition. Employ the use of only one tuition scale for everyone.

Recommendation: TWO

The following will be the MINIMUM Holy Rosary School tuition schedule for the next 6 years.

2013-----2020		RECOMMENDED TUITION SCHEDULE										2013-----2020	
	2013-14	2014-15		2015-16		2016-17		2017-18		2018-19		2019-20	
IN PARISH CHILDREN													
1	5,256	5%	5,519	5%	5,795	5%	6,084	5%	6,389	5%	6,708	6%	7,111
2	9,266	6%	9,822	6%	10,411	7%	11,140	7%	11,920	7%	12,754	8%	13,775
3	12,184	6%	12,915	6%	13,690	7%	14,648	7%	15,674	7%	16,771	8%	18,112
4	15,211	6%	16,124	6%	17,091	7%	18,287	7%	19,568	7%	20,937	8%	22,612
	2013-14	2014-15		2015-16		2016-17		2017-18		2018-19		2019-20	
OUT OF PARISH CHILDREN													
1	8,124	1%	8,205	1%	8,287	1%	8,370	1%	8,454	1%	8,538	2%	8,709
2	16,250	1%	16,413	1%	16,577	1%	16,742	1%	16,910	1%	17,079	2%	17,420
3	24,375	1%	24,619	1%	24,865	1%	25,114	1%	25,365	1%	25,618	2%	26,131
5	32,500	1%	32,825	1%	33,153	1%	33,485	1%	33,820	1%	34,158	2%	34,841

Recommendation: THREE

The following will be the Registration Fee for Holy Rosary for the next 5 years.

REGISTRATION FEE --- NON REFUNDABLE

	14/15	15/16	16/17	17/18	18/19	19/20
GENERAL	75	75	75	75	75	75
STUDENT ACTIVITIES	50	50	60	60	60	60
ROOM PARENT	25	25	25	25	25	30
USE AUCTION PROJECT	10	15	15	15	15	15
TECHNOLOGY	25	25	25	25	30	35
TOTAL	185	190	200	200	205	215

Recommendation: FOUR

There will no longer be a sibling discount for Pre-School

Recommendation: FIVE

The following will be the Pre-School tuition schedule

	<u>13/14</u>	<u>14/15</u>	<u>15/16</u>	<u>17/18</u>	<u>18/19</u>	<u>19/20</u>
Three and Four						
Year Olds 3 days	3053	3200	3400	3550	3675	3800
Four and Five						
Year Olds 4 days	4088	4300	4500	4900	5100	5350

Finally, on the topic of tuition, it is important to realize the connection between salaries and tuition. And when I use the word salaries, I am talking about both the actual money paid out and the compensation package that goes with it. Because of medical plans the compensation can progress at a higher rate than the CPI or salaries. Tuitions must increase, minimally, at the same rate as salaries and compensation. But when extra staff is added on, tuition must increase even more than the typical salary increase. Minimally compensation and tuition income should be equal. The more tuition that is collected over the coverage of salaries and benefits, the stronger an institution is financially. It is arguable that funded financial aid can be counted as part of tuition income in this type of thinking.

An additional challenge can be found in the fact that Holy Rosary probably used tithing as a way to pay tuition for a much longer time than almost any other school in the Archdiocese. This may have un-purposefully misled on both understanding tuition and totally feeling its cost because of deductible tax benefits which may not really have been deductible.

Subsidy income should first of all be identified as subsidy income as all parishes do. But this subsidy should be identified and used for something specific. Ideally it is all used for financial aid for parishioners. That helps alleviate the pressure for parishioners who cannot afford higher and higher tuitions. And the subsidy allocation should be set by the Parish for a specifically stipulated period of time. This should be the financial relationship and control established by the parish. The Parish should not be creating, approving, or rearranging the school budget. The school should. The present, unintentional, paternalistic attitude of Holy Rosary Parish towards Holy Rosary School inhibits administrative initiative, leadership and action. When the parish simply picks up whatever the school cannot pay for and adjusts the proposed school budget to meet the standards of the parish finance committee it abrogates any sense of ownership by the school and school administration. It can create needless tension between school and parish.

Recommendation: SIX

Starting with the year 2018-2019 all subsidies from the parish will be used as financial aid to parishioners in need.

RECOMMENDATION: SEVEN

Phase out different tuition structures. Have one tuition structure for the school whether people are in- Parish or Out-of- Parish ---- Catholic or Non- Catholic

Recommendation: EIGHT

The subsidy for 2013-2014 will be	\$290,000
The subsidy for 2014-2015 will be	\$280,000
The subsidy for 2015-2016 will be	\$270,000
The subsidy for 2016-2017 will be	\$260,000
The subsidy for 2017-2018 will be	\$265,000
The subsidy for 2018-2019 will be	\$270,000
The subsidy for 2019-2020 will be	\$275,000

Recommendation: NINE

Institute the following pay scale

June	1 SCALE 13-14	2 Scale 14-15	3 Scale 15-16	4 SCALE 16-17	5 SCALE 17-18	6 SCALE 18-19	years prior	teaching year
1	recommended						exp	
a	35,000	36,000	38,000	39,000	40,000	41,000	0	1
b	37,000	38,000	37,080	39,140	40,170	41,200	1	2
c	39,000	42,000	39,140	38,192	40,314	41,375	2	3
d	39,250	42,150	43,260	40,314	39,338	41,524	3	4
e	40,000	42,250	43,415	44,558	41,524	40,518	4	5
f	41,000	42,500	43,518	44,717	45,895	42,769	5	6
g	41,500	42,750	43,775	44,823	46,058	47,271	6	7
h	42,000	43,000	44,033	45,088	46,168	47,440	7	8
i	42,250	43,500	44,290	45,353	46,441	47,553	8	9
j	44,000	44,500	44,805	45,619	46,714	47,834	9	10
k	46,000	46,500	45,835	46,149	46,987	48,116	10	11
l	47,000	47,500	47,895	47,210	47,534	48,397	11	12
m	49,000	51,000	48,925	49,332	48,626	48,960	12	13
n	51,000	52,000	52,530	50,393	50,812	50,085	13	14
o	52,000	54,000	53,560	54,106	51,905	52,336	14	15
p	53,000	55,000	55,620	55,167	55,729	53,462	15	16
q	54,000	56,000	56,650	57,289	56,822	57,401	16	17
r	56,000	57,000	57,680	58,350	59,007	58,526	17	18
s	57,000	58,000	58,710	59,410	60,100	60,777	18	19
t	59,000	60,000	59,740	60,471	61,193	61,903	19	20
u	61,000	62,000	61,800	61,532	62,285	63,028	20	21
v	62,500	64,000	63,860	63,654	63,378	64,154	21	22
w	62,750	64,000	65,920	65,776	65,564	65,280	22	23
x	63,250	64,500	65,920	67,898	67,749	67,531	23	24
y	63,750	64,750	66,435	67,898	69,935	69,782	24	25
z	64,000	65,000	66,693	68,428	69,935	72,033	25	26
aa	64,250	65,250	66,950	68,693	70,481	72,033	26	27
bb	65,000	65,500	67,208	68,959	70,754	72,595	27	28
cc	65,250	65,750	67,465	69,224	71,027	72,877	28	29
dd	65,500	66,000	67,723	69,489	71,300	73,158	29	30
ee	65,750	66,250	67,980	69,754	71,574	73,439	30	31
ff	66,000	66,500	68,238	70,019	71,847	73,721	31	32
gg	66,250	66,750	68,495	70,285	72,120	74,002	32	33
hh	66,500	67,750	68,753	70,550	72,393	74,284	33	34
ii	67,000	67,250	69,783	70,815	72,666	74,565	34	35
jj	67,500	68,000	69,268	71,876	72,940	74,846	35	36

Stipend schedule

Masters	1,000	already in practice
Curriculum chair	1,000	already in practice
Department chair	1,000	already in practice
Overnight	125 per night	already in practice
Catechetical cert	500	recommended start 15-16

“There are no shortcuts to any place worth going.” Beverly Sills

Development income is the third leg of the table that supports a Catholic School. The participation of all parents must be expected. Specific activities must be detailed with realistically projected revenue streams over periods of time. Plans must be developed to achieve these goals. It seems that, in the not- too- distant past the Parent Association was basically the development organization of the school. As schools grow and the programs become more demanding and stressful, institutions usually have to take them more “in-house” and hire people to run them. It really does not take the stress off of the parents to work on them and help with them, but it allows an administrator to have someone accountable to them. Holy Rosary can no longer depend totally on volunteerism.

I have never heard of a combined school and parish stewardship committee. Personally, I believe it is unwise. I believe the school should have its own Development Committee. A hired staff member should sit on the parish Stewardship Committee and a hired staff person should sit on the school Development Committee. They should be in dialog with each other. The same staff member could sit on both or a different staff member could sit on each.

Recommendation: TEN

The school will hire someone to coordinate the Auction and the Magazine Sale starting with the 2013-2014 academic year.

This has already been approved by the pastor because of lack of time.

Recommendation: ELEVEN

The combined stewardship committee that presently exists will split into the traditional school Development Committee and Parish Stewardship Committee.

Recommendation: TWELVE

Budget the following for Development Income

Auction 13-14	\$130,000	plus \$30,000 in Fund- An- Item income
Magazines 13-14	\$60,000	
Trees 13-14	\$33,200	
Appeal 13-14	200,000	
West Fest 13-14	\$15,000	
Centennial 13-14	100,000	

Auction 14-15	\$140,000	plus \$30,000 in Fund- An- Item income
Magazines 14-15	\$64,000	
Trees 14-15	\$34,000	
Appeal 14-15	230,000	
West Fest 14-15	\$16,000	
Centennial 14-15	300,000	

Auction 15-16	\$150,000	plus \$30,000 in Fund An- Item- Income
Magazine 15-16	\$64,000	
Trees 15-16	\$35,000	
Appeal 15-16	250,000	
West Fest 15-16	\$17,000	
Centennial 15-16	500,000	

Auction 16-17	\$165,000	plus \$30, in Fund- An- Item income
Magazines 16-17	\$64,000	
Trees 16-17	\$36,000	
Appeal 16-17	275,000	
West Fest 16-17	\$18,000	
Centennial 16-17	500,000	

Auction 17-18	\$170,000	plus \$30,000 in Fund –An- Item Income
Magazines 17-18	\$65,000	
Trees 17-18	\$36,000	
Appeal 17-18	300,000	
West Fest 17-18	\$19,000	
Centennial 17-18	600,000	

Auction 18-19	\$180,000	plus \$35,000 in Fund An Item Income
Magazines	\$66,000	
Trees 18-19	\$37,000	
Appeal 18-19	\$310,000	
West Fest	\$20,000	
Centennial	\$50,000	

Auction 19-20	\$200,000	plus \$35,000 in fund an item income
Magazines	\$66,000	
Trees 19-20	\$38,000	
Appeal 19-20	\$320,000	
West Fest 19-20	\$21,000	
Centennial	\$50,000	

“The world stands aside to let anyone pass who knows where he is going.” David Starr Gorden

Centennial years are important times in the history of any institution. This is especially true for schools. This year (2013-2014) marks the Centennial for Holy Rosary School. This is an even more auspicious event for a Catholic school because fewer and fewer of them are making it to this point. During a Centennial, it is quite common for a school to have a special Capital Campaign for the institution and some form of major celebration. Everything during the academic year should take on a Centennial aura.

I was told about the Centennial after I had been at Holy Rosary for about a week. Usually, an institution is planning for at least three years prior to their Centennial year. I cannot see that a great deal of planning or organizing has taken place. I have, therefore, really had to just jump in on this. There is neither the time nor the money for a feasibility study for a Capital Campaign, but after many discussions and observations I realize the need is there.

I therefore made a proposal to the School Commission concerning the Centennial, and I asked the Parent Association Officers to coordinate a celebration event. The School Commission approved a campaign for \$2,000,000. The prioritized expenditures they approved were as follows:

1. Play structure	\$100,000
2. School Roof	\$300,000
3. School Window Repairs	\$100,000
4. Staff In-Service and Education	\$200,000
5. Endowment	\$1,200,000
6. Campaign Expenses	\$100,000
	\$2,000,000 TOTAL

They also approved the solicitation of everyone with a “triple ask”. One would be for the church pledge. One would be for the school annual appeal. One would be for the Centennial Capital Campaign. The collections for the Centennial would be over a period of between three and five years. The other two would be yearly. Hopefully, by the time this is being read these have already started, and I have found some other people willing to help with this project. Unfortunately, as I wrote earlier, because there is neither the time nor funding for a study to ascertain levels of support I will be finding this out as the solicitations are taking place. The goal, in my opinion, is not out of line when compared with total income collections. I truly believe the money is there. The question is ----- will the school be able to get it?

Endowment is the fourth and final leg of the table that supports Holy Rosary School. Endowments are growing exponentially in importance for the future survival of Catholic education. They are not, however, growing exponentially in the size of their corpus. For a Catholic grade school Holy Rosary does have ---- comparatively ----- a good amount of money in its endowment. But truly it is just a beginning. Truthfully, the target should be \$100,000,000. Ideally, Catholic schools should be trying to fully endow their school for future generations. That is because of two new realities that face this generation: retirement and Charter Schools. Charter Schools are a real threat to Catholic Education.

Young parents today are all fully aware that retirement is on their back. Company retirement plans are becoming a thing of the past. Even the future of government retirement plans is coming into question as people who do not have their own guaranteed retirement are fighting against increasing taxes to fund plans for government employees. This means that families are looking at that last portion of their “discretionary” income that used to go for tuition and really question if they can responsibly make that expenditure. Should they be investing in Catholic education? If people feel they can get the same type of “site- based” parent- involved education in a Charter School as they can in a Catholic school, but it just does not have religion and it is tuition free, what will they do? I think the answer is obvious. This is the first year in our history when there are more children enrolled in Charter Schools across the country than there are in Catholic schools. And this year there will be a number of Charter Schools introduced into Washington.

So yes ---- growing our endowments are important. We have to convince people to write them into their wills. **We have to write them into our wills.** We should make it known that when we die we want the school placed in our announcement as a cause rather than gifts of flowers. This means we must let our loved ones know about our desire. But this is long term. This is really for the benefit of the next generation ---- our children --- and our children’s children. Catholic schools will be here in the future because of us, or they will be absent in the future because of us.

As I leave the income portion of this paper I want to indicate that ideally a school should have 70% of their income come from tuition and fees, 20% come from development work and 10% come from endowment earnings. Expenses then could mirror this in that 70% would be for total compensation, 20% would be programs and 10% would be buildings and grounds. These are very general numbers, but something to be thought about.

EXPENSES

If we do not generate substantially more money for the school, we must make substantial cuts in the school. A group being served cannot demand to keep the services they are receiving when they are not able to pay for them ---- (unless you are the federal government). And we are not the federal government. That means that we have to cut services if we do not generate income to pay for them.

People can offer input on these potential (and I stress the word potential) cuts but I, as the Chief Administrator, in consultation with the Vice Principals, and listening to the Parent Officers ---- will make the decision.

Presently we expense over \$300,000 yearly for the enrichments or extras at the school. And the reality is that these expenses take away from the institution's ability to increase salaries for the rest of the staff. These programs include Spanish, music, classroom assistants, and reading. Unless we can actually pay for these, which means we are able to take care of our deficit (which I see as the number the parish must pay beyond the budgeted subsidy), I see the cuts taking place in the following order, realizing that much of what is being cut would be the responsibility of the classroom teacher.

Phonics

Second Grade Classroom Aids

First grade classroom aids

Kindergarten classroom aids

SPANISH

Music

Art

Reading Specialist

SALARIES

SALARIES are, and always will be the largest expense in any schools budget. Basically, what a school sells is service ---- the service of education. It is rather exhausting work. And the staff at Holy Rosary has continually done an excellent job. I use the word staff, because I am really talking about all of the employees. The secretaries, the maintenance staff, registration, development, support staff ---- everyone. When we talk about justice and just salaries we must constantly bring to mind that we are talking about the entire staff. And the increasing paper demands from both the Archdiocese and the government are creating volumes of work that were not here just five years ago. "Call to Protect", volunteer management, medical expectations, new accounting and payroll procedures are but a few. And in this age of heightened and more detailed security protocols, it is more important than ever to have someone at the main entrance at all times.

When lower tuitions place the pain for the burden of the cost of education on the backs of the staff, when it is the sweat of their labor, when it is the unusually long hours of their work that make the school function ----- there is an issue of justice that simply must be addressed.

Recommendation: THIRTEEN

Increase the front office staff staffing from a 1 fte and a .5 fte to two full time staff in the 2015-2016 academic year.

Estimated cost for salaries and benefits is \$25,000

Payment plan is to add 1% on top of the regular tuition increase

It is ridiculous to look at the state salary scale when we talk about our teacher salaries. Seattle does not use the state scale. Renton does not use the state scale. North shore does not use the state scale. Bellevue does not use the state scale. All these areas, which are our competitors for teachers have a supplemental scale that is added to the base state scale to create the main scale, which is much higher.

I do not believe Holy Rosary really has a functioning scale. Our staff is all over it when it comes to comparing their salary on a percentage basis to the state scale. There is no sixteenth commandment that says "Thou shalt use public school scales in determining salaries." These are creatures that unions have birthed. There is no indication that the more years a teacher teaches or the more degrees they have ----- the better they are as a teacher. I would like to at least address the degree and credits part of this issue in this plan. A later plan can address the years by reducing them and turning them into levels of proven competency. I can only take on so much in this, our first strategic plan for the future. This is also true for the staff and the parent body.

I am going to dump our excuse for a scale. Holy Rosary will be going to a one column scale similar to The Seattle Nativity School, Saint Joseph School, and Bush School. It is much easier to work with and to explain. No teacher will be penalized, and some will be helped. If the scale is behind their

actual salary they will have a “Grandfather Stipend”. And in no way should the salary of the teaching staff be linked to the salaries of parish staff. They have two different competitive environments in which they exist.

This type of a scale is much easier to budget with, and it allows, potentially the building up of funds which can be distributed to the staff once a year on either an equal basis or a performance basis.

Finally on the issue of Salaries ----- it is important to realize that every support staff member that is added on ----- potentially takes away from what can be distributed in the form of salary. That is also potentially true for my following thinking until the school gets to the point where it can totally fund all of its’ financial aid.

I believe it would be wise to offer tuition discounts to staff who are sending their children to Holy Rosary School. It would have to be phased in over time, but I think it would be wise and would help to retain staff over the long term. Soon, I believe within the next three or four years, there will be massive retirements from the public school system. Many teachers are in my age range. Some had intended to retire but because of their portfolios they decided to remain for a few extra years. The prime recruiting area for their teachers is the Catholic School system. That is but one of many reasons our compensation package must be increased.

CURRICULUM

Curriculums must be updated at schools on a regular and planned out basis. But it does no good, and it can be quite frustrating to have a staff study a subject area, investing a great deal of time and energy , exciting and invigorating a group of teachers over their discoveries and recommendations, only to realize there is no money to make the desired purchase.

Ideally, a school should be considering around \$100 per student in the adoption of a new program. This pays for both the materials, and the all-important in-servicing of staff that must take place both the year before and the year of an adoption. These are additional funds that should be factored into the tuition. I cannot see where they really have been, especially when the tuition does not actually cover the salaries and the benefits. Ideally, this would always be part of the Annual Fund Drive and the money would be raised one year ahead of the purchase.

Technology is a growing area of importance in education. It is also a growing area of expense. Machines age in terms of wear, but they also age because business purposefully makes better and better programs that need newer and newer machines. Technology has become both a subject taught apart from others, but also one that is more and more integrated into everything. We have over 100 computers now at the school. Our fabulous computer teacher cannot be expected to teach and to service all the machines. We cannot depend ----- forever ---- upon a wonderful dedicated volunteer to do our Web site. We need a person on staff completely dedicated to the oversight and repair of our system, and our technology products. And we need someone to be on top of information and promotional activity thru Facebook, Twitter, and some many other systems of which I neither know the

names nor understand the process. But I do know it is an area that is exponentially growing in its importance for the success of any institution.

It is also time for the school to develop an extremely detailed technology plan. We sent a few staff to an I Pad program in Chicago this summer and they have come back excited about the use of the I Pad in the classroom. My present thinking is to use some of the money we have for technology for the purchase of a set for the third grade students. This is because the two third grade teachers went to the training, and to ask the staff to consider using the money we have from Fund An Item last year for the fourth grade classrooms. One of the fourth grade teachers was involved in the training this summer. This way each child in grades three and four would have an I Pad. The I Pad will allow a teacher to teach at many different levels simultaneously. Ability levels can be addressed and students can be challenged at their appropriate levels. I would like to see I Pads added on in grades 5-8. To have teachers in-serviced without any follow up in the use of what they have learned is a waste of time and money. A new grade level would be added each year. Development activity would have to take care of the funding.

Presently we have two reading specialists, a math specialist, and phonics specialists. I think this is a good foundation for a true organized learning resource program. This program would officially coordinate the progress, assistance, and plans for both high end and low end students. We would probably have to increase the staffing by one person who really specializes in this area and stipend one of the individuals we presently have to coordinate a study on this and develop a plan.

Recommendation: FOURTEEN

Hire a technology specialist for the 2016-2017 academic year.

Estimated Cost for salaries and benefits \$70,000

Payment plan 3% tuition increase on top of regular increase unless development income takes care of this

The school also must establish a new cycle of curricular study and purchase. This is due to the fact that Holy Rosary was ready to act on its language arts program when interest and energy was suddenly redirected towards the math program. I therefore see the following as the new curriculum cycle.

**2013-2014 implement, in-service, and evaluate math
study and recommend language arts
develop a technology plan**

**2014-2015 implement, evaluate and in-service language arts curriculum
adopt a technology plan
study social studies
study our academic resource program and design a learning resource program and a
plan to achieve it**

2015-2016	implement, evaluate and in-service social studies study a robotics program approve a five year technology plan and budget approve a plan for a learning resource program study and recommend a religion curriculum
2016-2017	implement, evaluate and in-service technology plan implement and in-service religion curriculum introduce a robotics curriculum into the school study and recommend enrichments (music, Spanish, Reading, P.E.)
2017-2018	implement, evaluate and in-service enrichments curriculums study and recommend science curriculum religion program
2018-2019	I am holding space here for the accreditation study year and visit year
2019-2020	I am holding space here for the accreditation study and visit year

ADMINISTRATION

The present parent and student population has seen too much administrative turnover. For the majority of the school families have had three different Principals and I am now their fourth. Additionally I have only committed to one year. Although there may be many, who, after reading this “White Paper” may think that one year, is one too many! I am in a unique position in that I have been rather active in the Archdiocesan system for 42 years. So I have had the privilege to know, and work with many of the past principals of Holy Rosary. This has also allowed me to have some very frank conversations. I have known, and count as my friends Michael Cantu, Randy Peters, Kris Brown, Sheila Sutherland, and Sister Ann Pizello SNJM. I have also known a number of the Pastors.

So I have some observations and opinions even though I am new to the scene. Holy Rosary remains an excellent school despite administrative turnover. This is to be credited to the staff of Holy Rosary School. They have done an excellent job. The students do very well on their tests and their academic work. Graduates from the school are highly desired by the high schools. They come with leadership skills, a work ethic and a bank of knowledge appropriate for their continuing education. The staff works well together forming an educational community. They are very much involved with the multitude of activities associated with the school.

A challenge however can be found in the parish attempt to serve the business and administrative oversight of the school. A certain amount of unintended confusion, understandable miscommunication, and misunderstood decision- making processes seem to take place. And that is understandable when a smaller institution attempts to service the major administrative needs of a larger institution. It can also form academic administrators who unintentionally disengage from some financial and governing tasks that they should feel complete responsibility for. I refer to overall

accounting, tuition collections, new tuition payment procedures, development and some human resource issues, unclear governance and issue processing structure, and new registration practices. If, however the school were to take over the areas in this list that they do not already control, as I believe they should, staffing would have to increase to cover this.

Holy Rosary has been blessed with a wonderful plant manager. But his workload is unrealistic and he is not even able to adequately use his vacation days. The longer a plant manager stays, and this is highly desirable, the more vacation time they are due. And this time cannot realistically take place during a school year. So a school has to have someone to not only share the load from September thru June, but take more direct supervisory control during the summer months so justifiable vacation time can be used.

Recommendation: FIFTEEN

The school will hire an additional maintenance staff person starting with the 2015-2016 academic year.

Payment plan The cost would be addressed with a 2% increase in the planned tuition. This would be on top of the recommended tuition increase.

An important part of any Administrative Team in a school of this size is a full time school counselor. Often, in our present day and age, situations that seem to be in need of disciplinary actions are really in need of counseling approaches. This deals with parents, staff and students. A professional counselor can help get at the root of problems that manifest themselves in a school setting. This approach takes a great deal of time and delicacy. There is simply not the time, or the professional awareness for teachers and administrators to address, or even notice all situations. This is where a counselor comes in. A counselor can become a strong advocate for a child. A counselor can make the difference between a happy successful child and a depressed failure. A counselor can literally make the difference between life and death.

“We must adjust to changing times and still hold to unchanging principles.” Jimmy Carter

Recommendation: SIXTEEN

The school will hire its own bookkeeper and separate its books from the Church books during the 2016-2017 academic year.

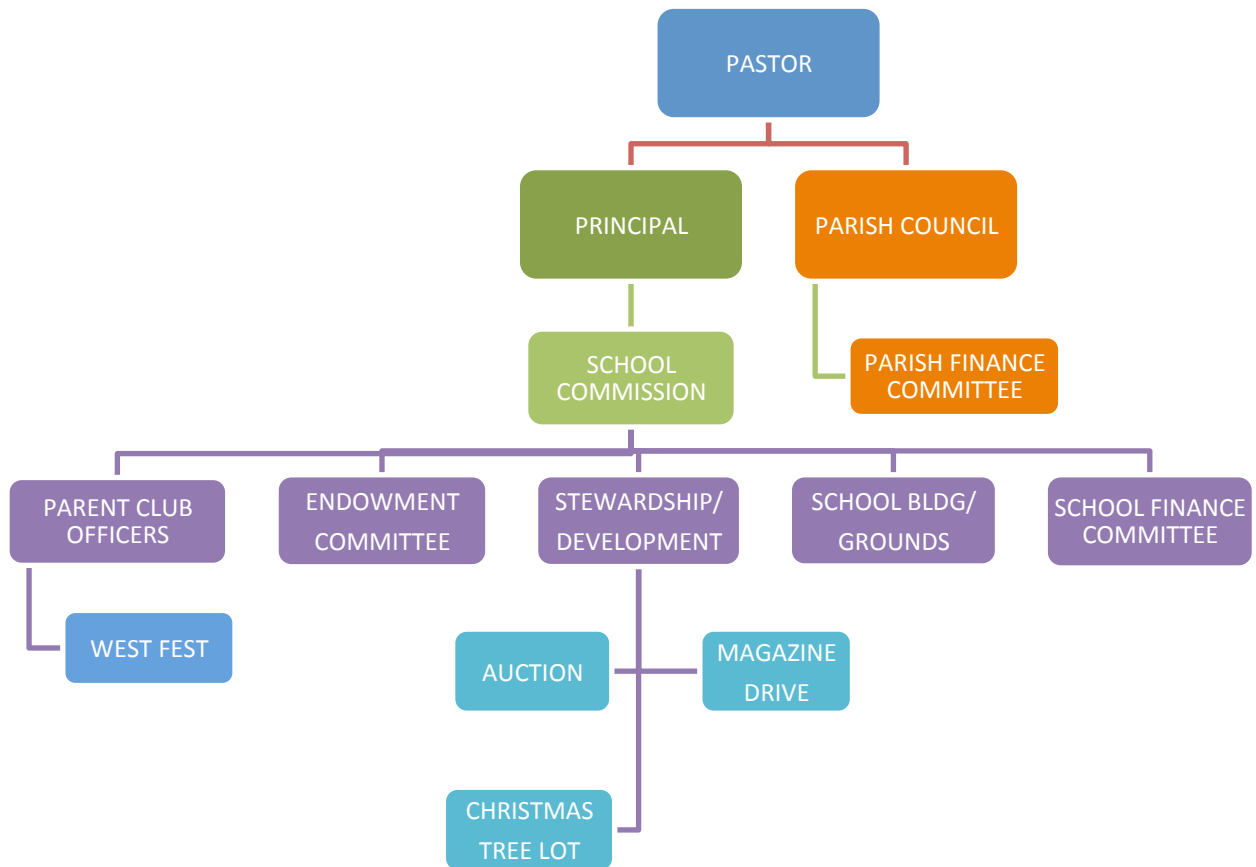
Payment plan because the school pays for this service in its present budget only a 2% increase over regular tuition increase would be expected

Recommendation: SEVENTEEN

The school will hire its own secretary to collect all receivables and write checks for all payables during the 2016-2017 academic year. (THIS MAY BE AFFORDED WITH OUR PRESENT STRUCTURE)

Recommendation: EIGHTEEN

The flow chart on the next page will be instituted immediately.



Recommendation NINETEEN

The school will hire a full-time counselor in the 2015-2016 academic year.

Payment Plan ----- there would be a 2% increase in tuition over the present projected increase.

There is, however, still the issue of our Administrative turnover and the need for stability. In searching for a new “Head of School” however, does the community really know what it needs? Different people may know what they want, and they may not agree, but who knows what is needed? An organization needs different types of leadership at different points in its history.

I personally believe that someone who has a logical and pragmatic business mind, someone who can create a structure where decisions can be understood, processed and clearly communicated, someone who can orally communicate to groups and individuals in a way that encourages and inspires, and can do the same in a written format ----- is what you are looking for. The Vice-Principals can do the rest ----- and the reality is ----- have been doing the rest, and much much more.

I told the Pastor I was only available for one year, and I told him that, at any time, he could ask for my resignation and I would give it to him. If someone is found that is better I will step aside. The selection process is, however, according to Archdiocesan Policy, something that I cannot be involved in.

It may be though ----- and I really stress the word MAY, that I might stay on for an additional year or two. For that to take place I ---- and you ---- would have to see me as being effective. The course that I am attempting to establish would have to be agreed upon (for the most part). And I see the possibility for an administrative change. My present salary could be split. Up to one third would be given to each of the Vice-Principals, and I would keep the balance. They would be called CO-Principals. I would be Head of School. I am not making this as a recommendation. I am offering it as something to think about.

The fact is that I should not remain at Holy Rosary if my ideas are not embraced. That does not mean they are all adopted exactly as they are stated, but at least the general thinking should be accepted. A dynamic discussion must take place. The community must want to realistically attempt to visualize the future and plan for it realizing that it is their sacred responsibility to plan and build for a future that goes well beyond their needs. This is the beginning of discipleship. And I will remain with you as long as I am needed and wanted.

My feelings are not hurt; I am not insulted; I am not depressed; and neither my career nor my financial needs are damaged in any way if it is decided that neither I, my ideas, nor my approach are wanted. This must be understood. And I find that reality actually rather spiritually and psychologically invigorating and freeing.

Of course, all that being said -----my health must be able to take what lies ahead!

“Come now, let us set things right” says the Lord (Is 1:18)

CLOSING THOUGHTS

Holy Rosary is a Catholic school, but it is also a business ---- a Catholic business. It must be run responsibly and judiciously. Long term thought and planning must take place for the sake of our existence, the quality of our work, the safety of those who enter our buildings and the justice in our actions. The school can be an excellent one-classroom school or an excellent two- classroom school. Radical change will lose some families and gain other families. The economics and economies of scale behind any new configuration are difficult to honestly determine. The present trajectory is not, however, sustainable.

At the present time the School enjoys a very generous subsidy from the parish. A change in Pastor could literally see that change overnight. And sudden financial changes can have disastrous impacts on a school. And when (I do not say if, because our survival demands it’s accomplishment) the school does make a financial turn around and generates positive cash balances, it must use a portion of those funds each year to pay back what it owes the parish from the many years when the parish gave much larger subsidies than were budgeted because of school income shortfalls. And in so doing it placed great stress on its own financial structure.

Recommendation: TWENTY

The school will pay back 50% of its yearly income over expense earnings until it pays off a debt of \$200,000. Restricted donations would not be part of the 50% that goes back to the school. (Our account could provide a thorough financial revelation on this.)

A strategic plan that is under construction by the Archdiocesan Schools Office is suggesting the possibility of a true school system, for those who desire it, rather than the present “system of schools” we have. This would offer the protection and stability of a common structure that is more closely connected to the Archdiocese and the Archbishop. One of the basic ideas behind this is the expertise and “best practices” of a system with experience and expertise. This is definitely worth our consideration.

The role of parents in all Catholic Schools has substantially changed over the last twenty years. That is partly due to increasing tuitions, partly to do with the fact that religious orders and communities are no longer running the schools, partly to do with the fact that most homes are either dual incomes or single parents therefore generating a bit of a psychological pressure for parents to be more informed. And this all leads to the age of consumerism. Parents truly are consumers. This is very American. It is not necessarily very “Catholic Church”, but here is yet another area where the Church may have to catch

up to, and realistically deal with, the living truth of our times. Consumerism is not bad, but it has to be understood. It has to be worked with. There are those who want Nordstrom service at a K Mart price. This just does not work.

**“Some (people) see things as they are and say ----
WHY? I dream things that never were and say ----
WHY NOT?”**

Robert Kennedy

Expectations and pressures are increasing exponentially upon those who serve in our school. And, unfortunately, the same is true for parents who send their children to the schools. The fact is that the same can be said for the children of this day and age. We are in an age where there is so much communication that, at times, comprehension escapes us. We attempt to dive into the ever expanding lake of life that we face but there is so much to it that we cannot dive deep down into any part of it. We simply float on the surface. Maybe it is time to realize that we cannot, and in truth there is no need, to master the entire body of water. There is more fulfillment in diving deep into the area that gives us the most life and enjoyment while offering us the greatest opportunity for growth and success.

Some are under the false illusion that grade school is much cheaper than high school. The state allocates the same per student amounts for children in high school as they do in grade school. The salary scale is the same in high school and grade school at the state level, and that should be true for our Catholic system. But in Catholic grade schools the students do not have to purchase their own books as they do in high school. And that additional expense can be pretty high.

Remember that Catholic schools have always done an excellent job with academics. But, as a system, and as individual schools, we have always been more than just academics. We truly teach the whole body ---- heart, mind, body, and soul. We infuse passion, leadership, a desire to volunteer and make the world a better place, a sense of justice and the ability to critically consider the issues of our time. We evangelize all who enter our doors. We help our children understand that they are the creation of an all-powerful, all loving, all forgiving God, who is always with them ----- especially in their time of intense need. This gives them an advantage in life beyond all others. This truly makes the difference.

Let us not just run to the latest fad. Let us not run in so many different directions that we lose our way. Let us recommit to our children, and to this institution. Let us ----- together ----- create something that will be here for our children’s children and their children’s children. Let us continue to develop the whole child --- socially, academically, spiritually, physically and psychologically. Nobody is saying it will be easy ---- but then what in life that is of truly great importance or value ever is?

“The highest reward for your work is not what you get for it, but what you become by it.” John C. Maxwell

Recommendation: One

Starting with the year 2018-2019 abandon in-parish and out- of- parish tuition and Catholic and non-Catholic tuition. Employ the use of only one tuition scale for everyone.

Recommendation: TWO

The following will be the Holy Rosary School tuition schedule for the next 6 years

2013-----2020		RECOMMENDED TUITION SCHEDULE										2013-----2020	
	2013-14		2014-15		2015-16		2016-17		2017-18		2018-19		2019-20
IN PARISH CHILDREN													
1	5,256	5%	5,519	5%	5,795	5%	6,084	5%	6,389	5%	6,708	6%	7,111
2	9,266	6%	9,822	6%	10,411	7%	11,140	7%	11,920	7%	12,754	8%	13,775
3	12,184	6%	12,915	6%	13,690	7%	14,648	7%	15,674	7%	16,771	8%	18,112
4	15,211	6%	16,124	6%	17,091	7%	18,287	7%	19,568	7%	20,937	8%	22,612
	2013-14		2014-15		2015-16		2016-17		2017-18		2018-19		2019-20
OUT OF PARISH CHILDREN													
1	8,124	1%	8,205	1%	8,287	1%	8,370	1%	8,454	1%	8,538	2%	8,709
2	16,250	1%	16,413	1%	16,577	1%	16,742	1%	16,910	1%	17,079	2%	17,420
3	24,375	1%	24,619	1%	24,865	1%	25,114	1%	25,365	1%	25,618	2%	26,131
5	32,500	1%	32,825	1%	33,153	1%	33,485	1%	33,820	1%	34,158	2%	34,841

Recommendation: THREE

The following will be the Registration Fee for Holy Rosary for the next 5 years.

REGISTRATION FEE --- NON REFUNDABLE

14/15	15/16	16/17	17/18	18/19	19/20
-------	-------	-------	-------	-------	-------

GENERAL	75	75	75	75	75	75
STUDENT ACTIVITIES	50	50	60	60	60	60
ROOM PARENT	25	25	25	25	25	30
USE AUCTION PROJECT	10	15	15	15	15	15
TECHNOLOGY	25	25	25	25	30	35

Recommendation: FOUR

There will no longer be a sibling discount for Pre-School

Recommendation: FIVE

The following will be the Pre-School tuition schedule

	<u>13/14</u>	<u>14/15</u>	<u>15/16</u>	<u>17/18</u>	<u>18/19</u>	<u>19/20</u>
Three and Four						
Year Olds 3 days	3053	3200	3400	3550	3675	3800
Four and Five						
Year Olds 4 days	4088	4300	4500	4900	5100	5350

Recommendation: SIX

Starting with the year 2018-2019 all subsidies from the parish will be used as financial aid to parishioners in need.

RECOMMENDATION: SEVEN

Phase out different tuition structures. Have one tuition structure for the school whether people are in- Parish or Out-of- Parish ---- Catholic or Non- Catholic

Recommendation: EIGHT

The subsidy for 2013-2014 will be	\$290,000
The subsidy for 2014-2015 will be	\$280,000
The subsidy for 2015-2016 will be	\$270,000
The subsidy for 2016-2017 will be	\$260,000
The subsidy for 2017-2018 will be	\$265,000
The subsidy for 2018-2019 will be	\$270,000
The subsidy for 2019-2020 will be	\$275,000

Recommendation: NINE

Institute the following pay scale

June	1 SCALE 13-14	2 Scale 14-15	3 Scale 15-16	4 SCALE 16-17	5 SCALE 17-18	6 SCALE 18-19	years prior	teaching year
1	recommended						exp	
a	35,000	36,000	38,000	39,000	40,000	41,000	0	1
b	37,000	38,000	37,080	39,140	40,170	41,200	1	2
c	39,000	42,000	39,140	38,192	40,314	41,375	2	3
d	39,250	42,150	43,260	40,314	39,338	41,524	3	4
e	40,000	42,250	43,415	44,558	41,524	40,518	4	5
f	41,000	42,500	43,518	44,717	45,895	42,769	5	6
g	41,500	42,750	43,775	44,823	46,058	47,271	6	7
h	42,000	43,000	44,033	45,088	46,168	47,440	7	8
i	42,250	43,500	44,290	45,353	46,441	47,553	8	9
j	44,000	44,500	44,805	45,619	46,714	47,834	9	10
k	46,000	46,500	45,835	46,149	46,987	48,116	10	11
l	47,000	47,500	47,895	47,210	47,534	48,397	11	12
m	49,000	51,000	48,925	49,332	48,626	48,960	12	13
n	51,000	52,000	52,530	50,393	50,812	50,085	13	14
o	52,000	54,000	53,560	54,106	51,905	52,336	14	15
p	53,000	55,000	55,620	55,167	55,729	53,462	15	16
q	54,000	56,000	56,650	57,289	56,822	57,401	16	17
r	56,000	57,000	57,680	58,350	59,007	58,526	17	18
s	57,000	58,000	58,710	59,410	60,100	60,777	18	19
t	59,000	60,000	59,740	60,471	61,193	61,903	19	20
u	61,000	62,000	61,800	61,532	62,285	63,028	20	21
v	62,500	64,000	63,860	63,654	63,378	64,154	21	22
w	62,750	64,000	65,920	65,776	65,564	65,280	22	23
x	63,250	64,500	65,920	67,898	67,749	67,531	23	24
y	63,750	64,750	66,435	67,898	69,935	69,782	24	25
z	64,000	65,000	66,693	68,428	69,935	72,033	25	26
aa	64,250	65,250	66,950	68,693	70,481	72,033	26	27
bb	65,000	65,500	67,208	68,959	70,754	72,595	27	28
cc	65,250	65,750	67,465	69,224	71,027	72,877	28	29
dd	65,500	66,000	67,723	69,489	71,300	73,158	29	30
ee	65,750	66,250	67,980	69,754	71,574	73,439	30	31
ff	66,000	66,500	68,238	70,019	71,847	73,721	31	32
gg	66,250	66,750	68,495	70,285	72,120	74,002	32	33
hh	66,500	67,750	68,753	70,550	72,393	74,284	33	34
ii	67,000	67,250	69,783	70,815	72,666	74,565	34	35
jj	67,500	68,000	69,268	71,876	72,940	74,846	35	36

Stipend schedule

Masters	1,000	already in practice
Curriculum chair	1,000	already in practice
Department chair	1,000	already in practice
Overnight	125 per night	already in practice
Catechetical cert	500	recommended start 15-16

Recommendation: TEN

The school will hire someone to coordinate the Auction and the Magazine Sale starting with the 2013-2014 academic year.

This has already been approved by the pastor because of lack of time.

Recommendation: ELEVEN

The combined stewardship committee that presently exists will split into the traditional school Development Committee and Parish Stewardship Committee.

Recommendation: TWELVE

Budget the following for Development Income

Auction 13-14	\$130,000	plus \$30,000 in Fund- An- Item income
Magazines 13-14	\$60,000	
Trees 13-14	\$33,200	
Appeal 13-14	200,000	
West Fest 13-14	\$15,000	
Centennial 13-14	100,000	

Auction 14-15	\$140,000	plus \$30,000 in Fund- An- Item income
Magazines 14-15	\$65,000	
Trees 14-15	\$34,000	
Appeal 14-15	230,000	
West Fest 14-15	\$16,000	
Centennial 14-15	300,000	

Auction 15-16	\$150,000	plus \$30,000 in Fund An- Item- Income
Magazine 15-16	\$68,000	
Trees 15-16	\$35,000	
Appeal 15-16	250,000	

West Fest 15-16	\$17,000	
Centennial 15-16	500,000	
Auction 16-17	\$165,000	plus \$30, in Fund- An- Item income
Magazines 16-17	\$70,000	
Trees 16-17	\$36,000	
Appeal 16-17	275,000	
West Fest 16-17	\$18,000	
Centennial 16-17	500,000	
Auction 17-18	\$170,000	plus \$30,000 in Fund –An- Item Income
Magazines 17-18	\$72,000	
Trees 17-18	\$36,000	
Appeal 17-18	300,000	
West Fest 17-18	\$19,000	
Centennial 17-18	600,000	
Auction 18-19	\$180,000	
Magazines	\$73,000	
Trees 18-19	\$37,000	
Appeal 18-19	\$310,000	
West Fest	\$20,000	
Centennial	\$50,000	
Auction 19-20	\$200,000	
Magazines	\$74,000	
Trees 19-20	\$38,000	
Appeal 19-20	\$320,000	
West Fest 19-20	\$21,000	
Centennial	\$50,000	

Recommendation: THIRTEEN

Increase the front office staff staffing from a 1 fte and a .5 fte to two full time staff in the 2015-2016 academic year.

Estimated cost for salaries and benefits is \$25,000

Payment plan is to add 1% on top of the regular tuition increase

Recommendation: FOURTEEN

Hire a technology specialist for the 2016-2016 academic year.

Estimated Cost for salaries and benefits \$70,000

Payment plan 3% tuition increase on top of regular increase unless development income takes care of this

Recommendation: FIFTEEN

PAYMENT PLAN The school will hire an additional maintenance staff person starting with the 2015-2016 academic year. The cost would be addressed with a .02% increase in the planned tuition.

Recommendation: SIXTEEN

The school will hire its own bookkeeper and separate its books from the Church books during the 2016-2017 academic year.

Payment plan because the school pays for this service in its present budget only a 2% increase over regular tuition increase would be expected

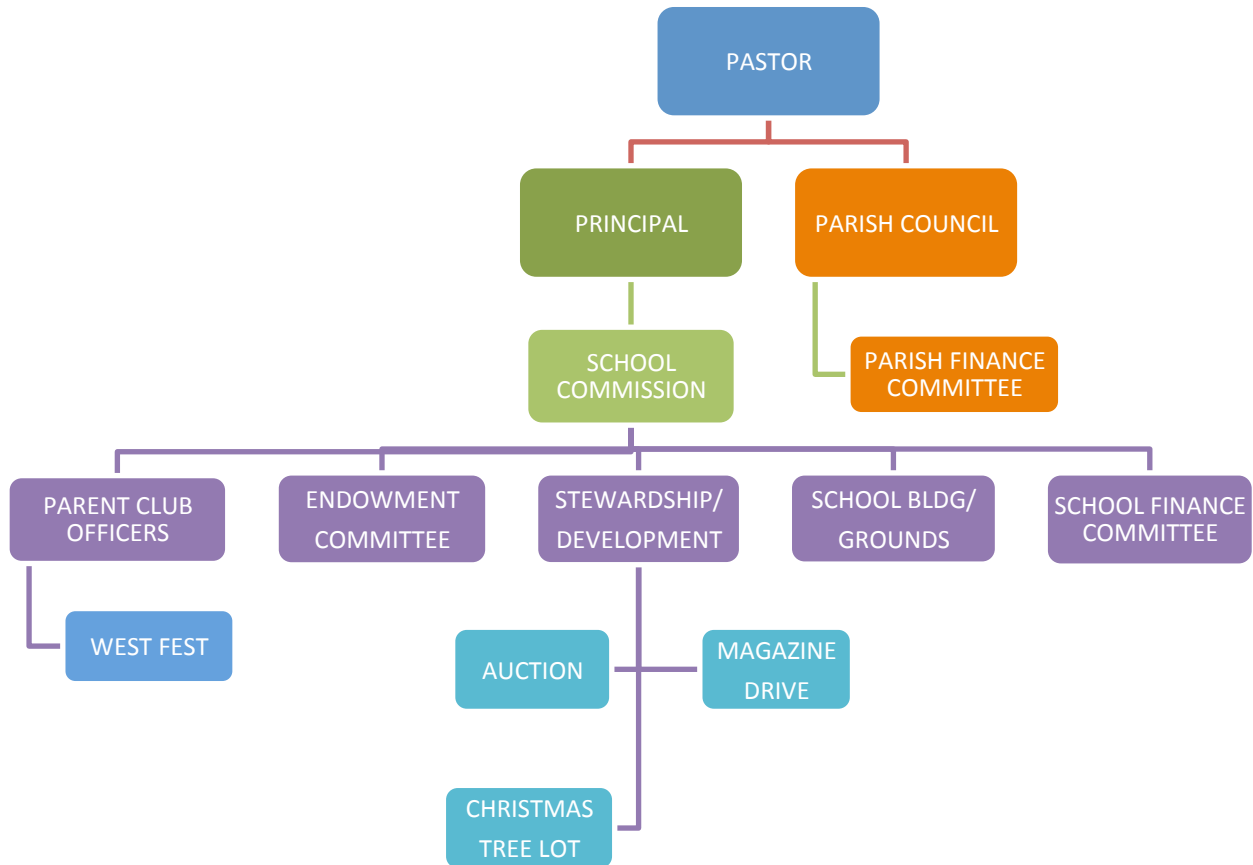
Recommendation: SEVENTEEN

The school will hire its own secretary to collect all receivables and write checks for all payables during the 2016-2017 academic year.

This may be able to be afforded with our present allocation

Recommendation: EIGHTEEN

The flow chart on the next page will be instituted immediately.



Recommendation NINETEEN

The school will hire a full-time counselor in the 2015-2016 academic year.

Payment Plan ----- there would be a 2% increase in tuition over the present projected increase.

Recommendation: TWENTY

The school will pay back 50% of its yearly income over expense earnings until it pays off a debt of \$200,000 which represents the money the parish had to fund to the school over and above the planned subsidy. A specific chart explaining the amount and how it was calculated will be developed. Restricted donations would not be part of the 50% that goes back to the school.

PROPOSED PROCESSING SCHEDULE

as of August 22, 2013

TUESDAY	AUGUST 27TH	RELEASE WHITE PAPER TO STAFF
FRIDAY	SEPT 6TH	SCHOOL FINANCE COMMITTEE DISCUSS PAPER White Paper Released to Parents on Web
TUESDAY	SEPT 10TH	SPECIAL MEETING IN PARISH HALL FOR EVERYONE ON PAPER
WEDNESDAY	SEPT 11TH	STAFF DISCUSSION ON WHITE PAPER
THURSDAY	SEPT 12TH	SCHOOL COMMISSION DISCUSS PAPER AND PROCESS COMMISSION DISCUSSION ON RECOMMENDATIONS 1,6,8,9,10,11
TUESDAY	SEPT 17TH	MEETING FOR EVERYONE IN GYM ON WHITE PAPER 7:00-9:00
THURSDAY	SEPT 26	PARENT CLUB MEETING --- DISCUSS RECOMMENDATIONS 1,6,8,9,10,11 AFTER MEETING OFFICERS VOTE ON 1,6,8,9,10,11
WEDNESDAY	OCT 2ND	STAFF VOTE ON RECOMMENDATIONS 1,6,8,9,10,11
FRIDAY	OCT 18TH	SCHOOL FINANCE VOTE ON RECOMMENDATIONS 1,6,8,9,10,11
NOVEMBER	7th	SCHOOL COMMISSION WILL VOTE ON RECOMMENDATIONS 1,6,8,9,10,11
TUESDAY	NOV 19TH	PARENTS DISCUSS RECOMMENDATIONS 2,3,5 PARENT CLUB OFFICERS VOTE ON 2,3,5
WEDNESDAY	JAN 15TH	PARENTS DISCUSS RECOMMENDATIONS 4,7,8 PARENT CLUB OFFICERS VOTE ON RECOMMENDATIONS 4,7,8
WEDNESDAY	JAN 21ST	SCHOOL STAFF DISCUSS AND VOTE ON RECOMMENDATIONS 2,3,5
FRIDAY	JAN 24TH	SCHOOL FINANCE DISCUSS AND VOTE ON RECOMMENDATIONS 2,3,5
THURSDAY	FEB 6TH	SCHOOL COMMISSION DISCUSS AND VOTE ON RECOMMENDATION 2,3,5
FRIDAY	FEB 21ST	SCHOOL FINANCE COMMITTEE DISCUSS AND VOTE ON RECOM 4,7,8
WEDNESDAY	FEB 26TH	SCHOOL STAFF VOTES ON RECOMMENDATIONS 4, 7, 8
THURSDAY	FEB 27TH	PARENT CLUB DISCUSS RECOMMENDATION 12, 13, 14, 15

PARENT CLUB OFFICERS VOTE ON RECOMMENDATIONS 12, 13, 14, 15

THURSDAY MARCH 6TH SCHOOL COMMISSION DISCUSS AND VOTE ON RECOMMENDATION 4,7,8

FRIDAY MARCH 14th SCHOOL FINANCE COMMITTEE DISCUSS AND VOTE ON 12,13,14,15

TUESDAY MARCH 25TH PARENTS DISCUSS 16, 17, 18, 19, 20

PARENT OFFICERS VOTE ON 16, 17, 18, 19, 20

THUIRSDAY APRIL 10TH SCHOOL COMMISSION DISCUSS AND VOTE ON 12, 13, 14, 15

THURSDAY MAY 8TH SCHOOL COMMISSION DISCUSS AND VOTE ON 16, 17, 18, 19, 20

This final part of this paper consists of historic data. I wish there were more to it, and I wish it was all from the same source, but that is not the case. I do think, however, that it does help to paint a picture as it helps us to understand the institution. As time goes on I will add to this data, and where appropriate make corrections. I have identified, with some type of a code, where I found the information contained in the data sheet I have developed.

In all undertakings it is important to know the data and to use it to plot a future course. Correct data correctly interpreted can win a war or if it is incorrect, incorrectly interpreted or ignored it can lose that same war, and possibly even lead to extinction. Correct data correctly interpreted can help make an institution successful and sustainable. It can help win ----- friends, productive involvement and support. Logic and process must guide us when we revue facts and figures rather than emotion. Our search must be for the truth rather than to prove a position we already held.

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	Bud 2012	2013
ALGB, 20B	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Enrollment K-4						484	483	491		480	470	465
Enrollment PreK										30	32	32
Total Enrollment						484		491		510	502	497
Staff						34	34	35	49		51	
Catholic Enroll						461		462		437	488	
Non-Catholic En						22		29		73	14	
Parish Ord Inc	1,177,349	1,132,320	1,146,012.00	1,153,871	1,192,804	1,196,169	1,182,877	1,223,171	1,238,216	1,242,883		
Tuition/Fee			1,534,322*			1,778,889	1,895,320	1,982,360			2,717,791	
Subsidy	377,630	411,450	418,608*	360,861	322,873	264,506	446,752	309,234*	338,365	269,435	287,054	
Sub % of OI	32%	36%	31%	31%	27%	22%	38%	25%	27%	25%		
SUB ACT V BUD												
Given to Church											356,090	
Number who gave											291	
Fundraising							340,150	266,500	0	0	256,000	
Development						185,500					114,000	
other Income							6,500				50,000	
Donations							185,500	100,000				
Tuition/Fee paid			1,534,322*					2,104,067*				
Catholic						4,080					5,078	
Non-Catholic						6,384					7,850	
Salary& benefits			1,795,990*					2,389,908*				
Endowment						1,015,078					1,204,923	
Base Salary						32,091						
Unpaid Tuition											56,607	
Families unpaid											30	
Financial Aid							60,000	75,702*			87,086	
Fulcrum Included						no					no	
Number on Aid											33	
DEVELOPMENT												
ANNUAL APP												
donating families								314*		265	251	
amount pledged										74731	82,951	

<i>amount paid</i>								126,978*		74,207	90,393	
CENTENNIAL												
<i>PLEDGED</i>												
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2,012	2013
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2,013	2014
WestFest								10,476*		13,792	14,823	
Magazine								81,715*		74,698	68,847	
Tree Lot								47,293*		35,200	33,114	
Endowment Dona								48,022*		50,000	50,000	
Auction General			117,000#	146,000#	163,000#	143,000#	151,000#	150,969*	174,000#	194,993	152,430	
Auction Fund An I										28,906	47,600	
Annual Report												
Deanery Data												
Schools Office												
Alicia												
RAINBOW												
OUR BUDGET												
Mary												
Published school*												
Kamila#												

