

ST. MARY OF THE IMMACULATE CONCEPTION SCHOOL

School Advisory Board

Strategic Plan: 2013–2015

Overview

The Strategic Plan is a three-year action plan designed to serve as the basis for measuring the effectiveness of the School Advisory Board (the “Board”).

Process

The Board employed a three-step strategic planning process: analysis, brainstorming, and prioritization.

Analysis focused on understanding the status and needs of the school. The primary analysis took the form of SWOTs (Strengths, Weaknesses, Opportunities, Threats) of the five areas most influenced by Boards and important to Catholic Schools: Facilities, Finances, Enrollment/Admissions, Marketing/Communications, and Fundraising. The analyses were developed by the Principal and School Advisory Board members on October 8, 2012.

The Board discussed the findings over the course of several Board meetings. A comprehensive list of actions, ideas, and wishes was created.

Every item of the comprehensive list was discussed and evaluated.

The Action Plan focuses on the new initiatives that are critical to the school’s success over the next three years.

The result of this process is the 2013-2015 St. Mary of the Immaculate Conception School Strategic Plan.

Summary

The Board has identified the following overarching goals which it should strive for over the next three years: (1) maintaining and improving upon fundraising achievements and deliverables attained over the previous three years; (2) continue working toward the school’s goal of upgrading computers and related technology hardware in order to ensure that the staff is provided with the opportunities to implement technology into the curriculum and overall learning process; (3) attaining 100% enrollment and; (4) continuing the improvement and renovation of the school’s site classrooms and facilities.

Facilities:

The school has updated four classrooms and additional classrooms need to be updated. Other areas of the school grounds are in need of updating and redesign. The school is in need of a grass play area for physical education and recreational purposes.

Finances:

There is a need to more clearly define the school's financial reserves policy and to clarify the target level for reserves. Further, there is a need to clarify the pace of growth and establish a growth policy of the financial reserves.

Enrollment/Admissions:

Though the Board understands that 100% enrollment is an ongoing goal of the school, further clarification is needed to delineate the school's annual admissions goal.

Marketing/Communications:

There is a need for improved marketing and communication tools to better promote the school's existence and awareness to the community.

Fundraising:

The school has a history and culture of significant fundraising activities supporting the financial strength of the school. Needed is improved organization pertaining to fundraising in order that all stakeholders in the school better understand the fundraising events, relevance of the fundraising activities and goals, and the timeline/calendar of fundraising events.

Action Plan

1

The school will complete the updating of 4th, 3rd, and 2nd grade classrooms. If funding allows, the updating will be completed during the summer break of 2013. If funding does not allow, then the updating will be completed during the summer break of 2014.

2

New investment will be made to improve technology hardware in the school. Specifically, additional iPads will be obtained in order to reach the goal of accommodating two full classes simultaneously. Other investment will be needed on an ongoing basis to provide improved access and upgrades to technology. The specifics of this additional investment are to be determined on an ongoing basis.

3

Additional updating to the school is a priority. Renovations are slated to begin during the Strategic Plan period and will extend beyond and ongoing during this decade. Projects identified, but not limited to are: Installation of grass recreation area on school grounds of sufficient size to accommodate school recreational activities, update the front school office, Principal's office, Bookkeeper office, Library, Learning Center, Counselor's Room, electrical upgrades, paint and carpet in various areas of the school.

4

The Board will assist the Pastor and Principal in achieving the Enrollment/Admissions goal of 100% enrollment.

5

Under the supervision of the Principal, an annual report will be produced. The report will be used to annually update current school families, parishioners, and alumni on the school as well as to promote the school to families interested in St. Mary's School in an effort to reach our 100% enrollment goal. The first report will be completed by the beginning of the 2013-2014 school year.

6

The Board recommends to the Pastor, Father Paulson, to modify the signage on Mt. Diablo Blvd at the front of the Church so the signage will add the school name to the existing signage which currently reads "St Mary's Catholic Church". It is acknowledged that the Church and school will undergo a significant premises remodel later in this decade and the signage on Mt. Diablo may again be revisited. The signage modification is recommended to be completed by the end of the 2013-2014 school year. An additional sign but less prominent is recommended to be obtained and placed on the entrance to the school on Alpine.

7

Under the supervision of the Principal, a fundraising calendar will be created, which will outline the timeline of the fundraising activities during the school year. The Principal will work in conjunction with the Parents Club leadership as most of the fundraising activities will be led by the Parents Club. The fundraising calendar will be completed by the beginning of the 2013-2014 school year.

8

The school has been growing the financial reserves necessary to offset the potential for a negative downturn in the economy, admissions, and revenues of the school. Financial Reserves are to be defined as a standalone budgetary line item with the goal amount to be between 50-70% of the annual expenses of the school. The Board will recommend to the Pastor, and the Principal, that the policy of the growth of financial reserves is as follows:

- Up to 50% of the annual school expense budget, 100% of the amount of funds beyond expenses will be allocated to increasing the reserves*
- From 50% to 60%, 75% will be allocated to reserves, 25% will be invested in the school*
- From 60 to 70%, 50% will be allocated to reserves, 50% will be invested in the school*
- Above 70%, no additional funds will be allocated to reserves, 100% will be invested in the school*
- The final decision to enact this growth policy will be a recommendation of the Board and be under the decision making discretion and authority of the Principal and Pastor.*

Notes:

The Financial Officer of the Board will determine on an annual basis beginning with the beginning of the 2013-2014 school year the following:

- The amount of the projected school budget*
- The amount of the actual reserves*
- Any amount of the reserve funds that is restricted and not counted towards the reserves will be separated as a an additional line item in the financial statements of the school*
- The goal is improved transparency and clarity regarding the current and projected status of the financial reserves*

Signed:

School Advisory Board President

Principal

Pastor

Date

Date

Date