



DIOCESE OF FALL RIVER TASK FORCE ON CATHOLIC EDUCATION

Summary Assessment and Recommendations
September 2016

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Dear Bishop da Cunha,

It is with great pleasure that we send to you the Final Report of the Task Force on Catholic Education for the Diocese of Fall River. The document sets forth an aspirational vision for our Catholic schools that calls for excellence at all levels, and makes recommendations for investments and changes that we as a Task Force believe are necessary to embark on the path to realizing that vision. We hope that it marks the beginning of a new way of thinking and talking about our Catholic schools throughout our Diocese. It is meant to be a durable long-term vision, characterized by optimism, transparency, trust, collaboration, investment, and action.

We believe fervently that Catholic education is foundational to the mission and the future of the Church. For many years, our teachers, administrators, students, and parish communities have been remarkably successful working with limited resources as largely independent entities. The commitment and passion they have for their work is palpable on our campuses. But our schools' costs have risen as they transitioned from religious to lay staff, while the educational, competitive, and demographic environments have changed around them. Our schools – like many Catholic schools around the country – have not consistently had the resources, leadership, and flexibility to respond to these shifts.

We have lost overall enrollment and we have lost schools. The environment has changed in fundamental ways and we must respond in equal measure. We cannot afford to take a gradual and incremental approach. The critical importance of our schools means that we must think and act differently. As a community, we must rally around a bold vision and embrace change as essential to the future of our schools.

We offer the work contained in this document as your humble partners in the project of setting our system of Catholic schools on a path to a bright future. If our work is effective, it will be a starting point for ongoing conversation and collaboration.

It has been a privilege to lead this Task Force.

Sincerely,

Father George Bellenoit

Kate Carney Larisa

Co-chairs, Task Force on Catholic Education for the Diocese of Fall River

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Catholic Schools of the Diocese of Fall River At-a-Glance

About DFR Schools (SY 15-16)

6,573 total students enrolled

- Elementary Schools: 3,635
- High Schools: 2,938

Enrollment across the 5 deaneries

- Attleboro: 1,806
- Cape Cod: 876
- Fall River: 1,312
- New Bedford: 1,769
- Taunton: 810

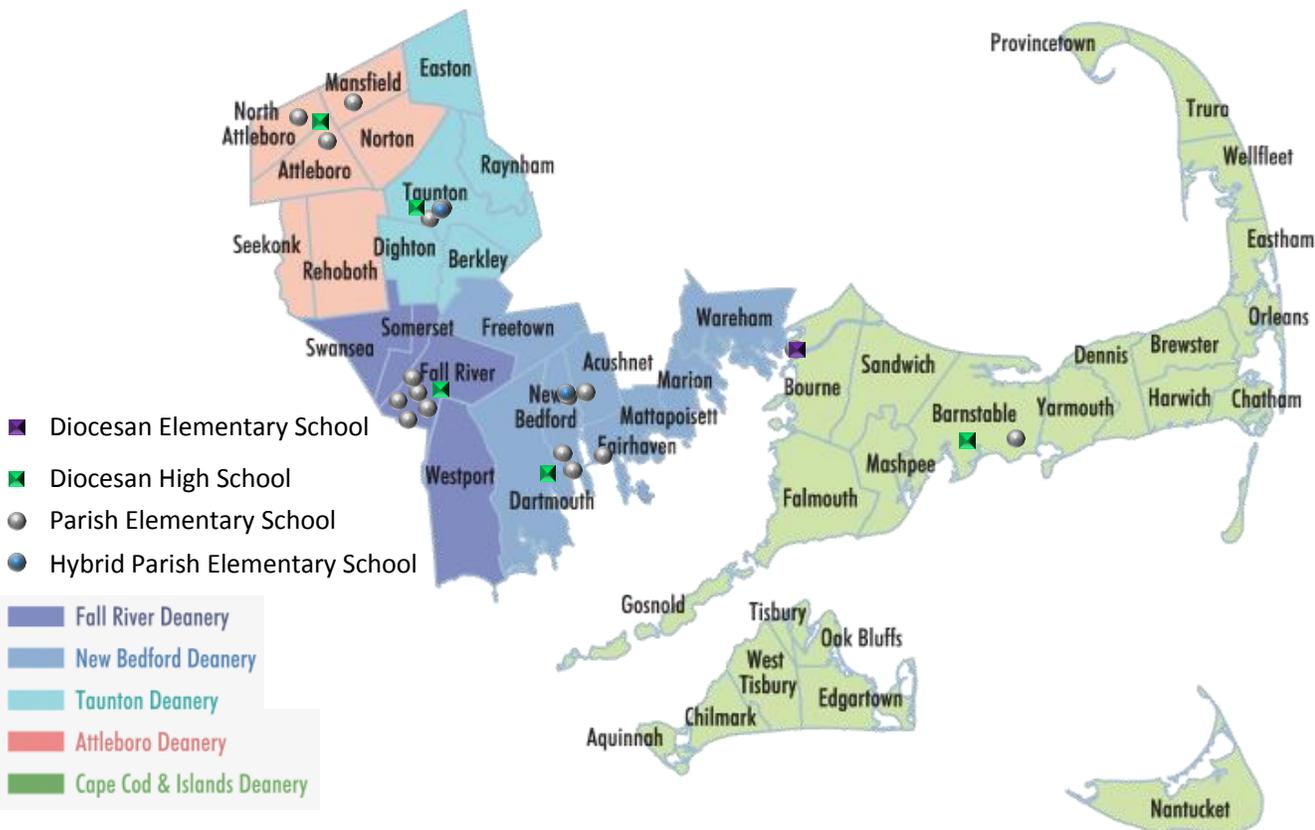
Collective school budget

- K-8 Schools Total: \$18.9m
 - 17 School Range: \$700k-\$1.9m
- Middle/HS Total: \$29.1m
 - 5 School Range: \$2.7m-\$10m

The 82 parishes of the Diocese of Fall River encompass the cities and towns of southeastern Massachusetts, Cape Cod, and the Islands of Martha's Vineyard and Nantucket. They are organized in 5 deaneries.

The Fall River Diocese system of schools is made up of 17 elementary schools (grades PK-8), 2 combined middle and high schools and 3 high schools. The 17 elementary schools are located in Acushnet, Attleboro, Bourne, Fairhaven, Fall River (5), Mansfield, New Bedford (3), North Attleboro, South Yarmouth, and Taunton (2). The two combined middle and high schools are located in Hyannis and Taunton. The three high schools are located in Attleboro, Dartmouth, and Fall River.

In the Diocese, schools adhere to three different models of governance – parish, diocesan and a hybrid model. Of the 17 elementary schools, 14 are parish schools, maintained and governed by their local parish priest; 1 is a diocesan school, maintained and governed by the Diocese's Catholic Education Center (CEC); and 2 are considered hybrids, maintained and governed by a combination of the two. All 5 middle/high schools are diocesan, governed by the Catholic Education Center.



Task Force Vision

The Task Force believes that academically excellent, vibrant, and sustainable Diocese of Fall River (DFR) schools, inspired and guided by Catholic values, are a cornerstone of thriving Catholic communities. As such, the Task Force embraces the following elements as central to its vision for the future of DFR schools:

1. DFR schools offer faith and values instruction and activities that support each student's spiritual development and lay the groundwork for lifelong pursuit of faith formation.
2. DFR schools offer quality academic programs that support each student to reach his or her fullest potential.
3. DFR schools are regarded as schools of choice for families in their communities, and have few unfilled seats.
4. DFR schools have the leadership and resources to respond to trends in parent and student needs and expectations, as well as pedagogical practice.
5. A PK-12 Catholic education is accessible to every family that desires one, regardless of income or cultural background.
6. The Diocesan community embraces thriving, vital, accessible schools as their collective responsibility.
7. An effective Catholic Education Center serves local schools through provision of shared resources; setting of clear standards and policies; and facilitated communication and collaboration.
8. DFR leadership – particularly administrators and clergy – are active and present in DFR schools, both shaping a vision of success for all students and nurturing student achievement.
9. DFR staff – including teachers, administrators, and support staff – view the schools as desirable workplaces that respect and reward their employees.
10. DFR schools are financially stable, adequately resourced, and able to invest appropriately in facilities and other infrastructure.

Summary Assessment

Overview

Within DFR schools, there is much to celebrate and take pride in. First and foremost, the incredible dedication of the teachers, administrators, support staff, and pastors who are called to this work creates warm and welcoming school communities throughout the Fall River Diocese. Visits and tours of each DFR school revealed a genuine and deep culture of catholicity. Overall, academic achievement is strong. Additionally, DFR schools' tuition levels remain highly affordable in comparison to their private counterparts.

The challenges facing DFR schools are familiar to Dioceses throughout the country. Within DFR communities, especially in urban areas, shifting demographics, increasing competition, and falling participation in Catholic life have precipitated declining enrollment. The move from religious to lay teachers and administrators has added to DFR school costs. As a result, many schools are struggling financially. Increasingly, the struggle to keep tuition within reach of families while providing a high-quality education and compensating DFR staff at a just and competitive level is a fundamental challenge to the business model of Catholic education.

The legacy of operating schools with scarce resources for many years has accumulated, leaving the DFR system of schools with outdated administrative systems and processes; minimum levels of faculty and administrative support; salaries that are not competitive; many outdated facilities; and limited capacity to pursue school-level or centralized fundraising and marketing efforts that could help to grow schools' financial resources and enrollment. Finally, the traditional model of local, decentralized governance has offered the DFR schools limited means for responding strategically to the changes around it as a collective system of schools with a common goal of keeping Catholic education alive and thriving in the Diocese.

The work of the Task Force, and the production of this report is just the beginning. There is much work yet to be accomplished. Shortly, the Bishop will establish a committee to take the findings and recommendations contained in the report and begin the process of implementation. Inevitably, in this process of renewal, there will be difficult choices to be made to ensure that our schools are not only vibrant places of faith and academic excellence today, but have strong, sustainable foundations that can last well into the future.

Assessment Process and Methodology

In the spring of 2015, at the request of Bishop da Cunha, and with the leadership of the Catholic Education Center and the support of the Carney Family Foundation, the Diocese convened a Task Force to undertake an assessment of the DFR schools. The Task Force on Catholic Education was composed of representative clergy, faculty, administrators, lay people, business and community leaders. It aimed to study and address the Bishop's key strategic concerns regarding the health, vitality and future sustainability of Catholic education in the Diocese (refer to the appendix for a complete list of the Bishop's initial questions).

In order to comprehensively handle the depth of the work required and adequately address Bishop da Cunha's questions, the Task Force created four subcommittees, each with its own charge related to priority functional areas: Academic Excellence, Enrollment, Finance and Governance. In addition, the Task Force formed a steering committee to provide general guidance and oversight, whose role was to align the four working groups. The Task Force also hired TDC, a Boston-based nonprofit consulting firm, to gather existing data, conduct new research, and generate analyses for each subcommittee, as well as to facilitate a process to help the Task Force deliver its recommendations to the Bishop.

Over the subsequent months, the four subcommittees, with support from TDC, the Diocesan Chancery and the Catholic Education Center (CEC), gathered existing data and sought input from a range of constituents. The Task Force's research started with a thorough review of existing and centrally available data located at both the Chancery and the CEC. One-on-one interviews were conducted with each school principal. Subsequently, in an effort to conduct outreach to the broader community, the Task Force surveyed a multitude of stakeholder groups that included DFR school parents, school advisory board members, teachers, as well as all of the priests and parishioners in the Diocese. Further outreach included school site visits, whereby the Task Force convened teacher focus groups, interviewed school leadership, and toured school facilities. In addition, the Task Force convened a panel of Catholic education experts and conducted considerable secondary market research to contextualize the current state of DFR schools with the local market conditions as well as local, state and national trends in Catholic education.

The summary assessment on the following pages embodies the compilation and synthesis of the Task Force's considerable work effort.

Task Force Grounding Principles

As part of their early work, the Task Force on Catholic Education developed the following values to guide deliberations and set recommendations for the Bishop:

- The fundamental purpose of a Catholic education is to provide an environment in which students are enabled to build and deepen their relationship with God; to teach Catholic principles, values and traditions; to actively promote growth in virtue; and to foster a rigorous academic culture aimed at the pursuit of truth.
- Catholic schools are critical to the future of the Church.
- Catholic schools are a vehicle for social justice, especially in urban areas, and strive to provide access to all who aspire to a Catholic education.
- The health of Catholic schools is a shared responsibility of all in the Diocese; to thrive, schools need the partnership of the entire community, including but not limited to parents, faculty, administrators, clergy, parishioners, and partner organizations.
- The Diocese has not been positioned to invest the resources necessary for DFR schools to achieve their aspirational goals; going forward, all schools should be given the opportunity to find success.

Summary Findings: Academic Excellence Subcommittee

Student Outcomes

- In general, elementary school students demonstrate proficiency in Iowa Assessment standards, but show higher rates of proficiency and advanced proficiency in English Language Arts than Math across all grades. A few K-8 schools are notably underperforming DFR peers.
- High school students are generally outperforming the public school district, state and national averages on the SAT.
- High school students are graduating and attending college at higher rates than their public school peers.
- There are no shared standards or goals for academic quality against which DFR schools' performance is measured.
- Roughly 50% of 8th graders continue on to Catholic high schools.
- Faith and values are taught through classes, service programs, and other initiatives. Teachers generally reported that instruction is strong and prepares students to grow in faith and become committed parishioners.

Teachers & Administrators

- At all schools, teacher salaries are well below district and state public school averages. At most elementary schools, salaries fall below the Catholic school New England regional average. In 4 of 5 high schools, salaries are close to the Catholic school New England regional average.
- Most K-8 principal salaries are below the Catholic school New England regional average, and many are well below this benchmark. Most HS principal salaries fall in the typical range for Catholic school principals in the New England region, though below Boston's.
- All school leaders report conducting some sort of teacher evaluation. Practices vary widely. School leaders do not receive regular evaluations.
- Teachers expressed a desire to access professional development opportunities tailored to their individual needs as well as training related to supporting students with special needs.
- Administrators would like professional development in specific areas related to school operations, finances, and leadership.

Resources to Support Teaching and Learning

- Across all schools there is a high need for support for students with special needs.
- The CEC develops curriculum standards, but their application is not required. Most schools use the Diocesan standards to guide instruction and provide their teachers with curriculum.
- Use of student performance data to guide individual instruction and align curriculum is uneven and left to the discretion of school administrators and/or individual teachers.
- The majority of teachers agree that they have adequate access to technology, though technology is not always updated.
- Keeping school facilities in good repair and up-to-date is the responsibility of each individual school. High schools have generally been able to make at least some investments in facilities, and have raised dedicated funds and/or taken loans to do so. K-8 schools have generally had more limited means to invest in their facilities. Many are in need of basic repairs and upgrades. In most cases, the buildings are old; their configurations are not always well-suited to the needs of 21st century school communities.

Academic Excellence

Key Figures

- **English/ Language Arts Iowa Assessment Test Proficiency (SY 14-15)**
 - Diocesan Median: 89%
 - Range: 57% to 98%
- **Math Iowa Assessment Test Proficiency (SY 14-15)**
 - Diocesan Median: 80%
 - Range: 57% to 90%
- **Average total SAT score (SY13-14) 2400 pt. scale**
 - Range: 1502 to 1736
 - State average: 1526
 - Nat. average: 1497
- **K-8 Salaries (SY 15-16)**
 - Median DFR School Teachers: \$25,194 to \$48,693
 - Principals: \$35,000 + housing to \$75,000
- **HS Salaries (SY 15-16)**
 - Median DFR School Teachers: \$40,200 to \$51,500
 - Principals and Presidents: \$84,870 to \$110,128

Summary Findings: Enrollment Subcommittee

Enrollment Trends and Related Factors

- Overall DFR enrollment has declined steadily in recent years. Some schools have been stable; only a few schools have shown improvement.
- DFR elementary school enrollment trends are better than the national Catholic school trends in 2 of 5 regions, while 2 of 5 DFR high schools are better than national trends.
- Across the Diocese there is small attrition at each grade level, reflecting a pattern of steady decline of each class as it progresses from year to year.
- Despite growth in Pre-K programs as a strategy to bolster K class sizes, the size of entering classes in the elementary schools has been declining, likely foreshadowing continued enrollment declines. High schools' entering class enrollment is mixed: 2 have been steady, 2 declining, and 1 is showing signs of growth.
- Based on principals' estimates of capacity, unfilled seats exist at many of the schools, but at vastly different levels. (see sidebar)
- The Hispanic student population is small at most schools; it is over 10% at 2 schools. Few students come from households living below the federal poverty line (\$24K for a family of 4).

Market Research

- The markets DFR schools serve are characterized by deteriorating economic conditions, declining school-aged populations, and growing (though proportionately small) ethnic diversity. The number of registered Catholics and faith formation participation has declined in 4 Deaneries.
- In general, elementary schools draw from a geographically proximate area, suggesting limited growth opportunities from adjacent markets. High schools are regional, suggesting opportunities for growth, but also that they compete with each other directly for students.
- In all markets, there is evidence of competition from tuition-free options (public/ charter/ vocational) AND private schools.
- In general, enrolled parents consider their Catholic school to be superior to their public option, but the degree of perceived difference is much higher in the urban districts of Fall River, New Bedford, and Taunton.
- In 4 of 5 regions, charter schools were among the top non-public district competitors.
- Elementary school parents frequently selected Religious Education and Positive Values as their top motives for enrollment. In addition to these, high school parents frequently selected College/ Career Readiness.
- 75% or more of parents report their overall satisfaction as either "very satisfied" or "extremely satisfied" at 4 of 5 high schools and 12 of 17 elementary schools.

Marketing Operations

- In general, parish schools have limited planning and marketing expertise, resulting in widespread deployment of low-cost practices. Volunteer help is often used to fulfill responsibilities.
- Diocesan middle/high schools typically staff more robust, specialized administrative teams with the ability to use sophisticated marketing tactics.

Enrollment Key Figures

- **Cumulative Enrollment Trend (SY 10/11 to SY 15/16)**
 - K-8 median: -7%
 - K-8 range: -34% to +21%
 - HS median: -4%
 - HS range: -57% to +54%
- **Capacity Utilization**
 - K-8 median: 80%
 - K-8 range: 50-99%
 - HS median: 80%
 - HS range: 56-103%
- **Students of Color**
 - K-8 median: 10%
 - K-8 range: 5-21%
 - HS median: 13%
 - HS range: 6%-21%
- **Hispanic Students**
 - K-8 median: 3%
 - K-8 range: 0-19%
 - HS median: 2%
 - HS range: 1%-4%
- **Household Income**
 - Median % under \$25K: 3%
 - Range % under \$25K: 0-9%
 - Median % over \$100K: 57%
 - Range % over \$100K: 12-77%
- **Parent Satisfaction (% "very satisfied" or "extremely satisfied")**
 - K-8 median: 81%
 - K-8 range: 56% to 93%
 - HS median: 86%
 - HS range: 73% to 89%

Summary Findings: Finance Subcommittee

Financial Operations

- Across the schools, financial functions are handled by staff with little or no formal training in finance or accounting.
- There is very little financial strategy or planning expertise available to schools or to the CEC; in some schools, board members provide some of these skills on a limited basis. This creates limitations on schools' ability to create financial aid and tuition strategies that optimize enrollment and access.
- There is no third-party oversight through auditing or a financial review at schools, and there has not been such oversight at the CEC for many years.
- In general, there is a need to update bookkeeping and financial reporting practices to improve transparency, oversight, and managerial decision-making.

Financial Models and Trends

- Schools' primary revenue driver is tuition (median 80% of revenue) and the primary expense driver is salaries and benefits (median 72% of revenue).
- Subsidies and donations make up a median of 4% of revenue at elementary and 7% of revenue at secondary schools; secondary school budgets are larger and fundraising operations are far more formalized and sophisticated.
- Endowment assets across all Diocesan schools total \$10M; proceeds from endowment are not a primary driver; no draw was taken until SY13.
- From SY11 to SY15, elementary school deficits grew in both number and size – from a cumulative \$200K to \$1.1M. Just 4 of 17 elementary schools had a breakeven or positive operating bottom line in SY15.
- Operating results at 4 of the 5 middle/high schools were steady or improving from SY11 to SY15; these four were at breakeven or better. One middle/high school continued to run a deficit in the 5-10% of expenses range. In general, secondary schools' operating performance was much stronger than elementary schools'.

Financial Relationships

- Collectively, the schools and the CEC owe \$16.2M to the Diocese, which has provided credit both passively by not pursuing collections, and actively by funding facility and other needs. Of this debt, \$4.2M is comprised of employee benefits expenses that are paid directly by the Diocese that schools did not reimburse.
- The CEC acts as a fiscal administrator for the Diocesan schools, collecting all cash and paying all bills. On a cash basis, schools with surpluses fund others' losses and pay for the portion of CEC overhead not covered by the Diocese. However, on paper, some schools have accrued positive balances and other have accrued negative balances because no official policy has been set for either the appropriating of surpluses to subsidize the system, or the funding of operating losses.

Summary Findings: Governance Subcommittee

Structures & Roles

- 14 parish schools are officially controlled by their pastor. Pastors with schools are generally not trained in school administration and are not necessarily selected for pastorates with schools based on their experience, interest, or aptitude for running a school. Responsibilities that are delegated to the principal vary widely – both from school to school and as the pastor at the school changes over time. According to teachers and principals, the parish school pastors' presence on campus is highly valuable to the school community, but varies widely across the schools, as does their perception that the pastor is an advocate for the school. The perception at many schools is that there is insufficient clergy presence.
- 6 Diocesan (and 2 hybrid) schools are officially controlled by the Bishop, whose authority is delegated to the Superintendent. The Superintendent is most involved in financial and human resources matters. The Head of School/principal/president leads administration and makes recommendations for official approval.
- 16 of 22 schools have boards; all are purely advisory. Those without advisory boards are working toward establishing them but are not always sure how to use them. Their role varies widely from school to school.

Pastors' Perspective

- Pastors with schools generally feel they have enough time to fulfill their responsibilities at the school. Some, however, do not feel they have had access to adequate preparation or support to oversee a school.
- All pastors agree that DFR schools should be a priority, but those with schools believe schools should be a higher priority compared to those without schools.

Advisory Boards

- Within all advisory boards, there is an overall lack of clarity regarding the board's primary responsibilities.
- Although board members are not entirely clear on the board's responsibilities, the majority of members at least agree that the board should have broad responsibility in governance matters.
- 10 of the 16 boards believe they are performing effectively overall, but members' ratings of specific areas of responsibility and board functioning suggest there are many opportunities for improvement, even among boards that consider themselves effective.

Task Force Recommendations

Introduction

As the research has demonstrated, the Diocese has an uneven system of schools. While there is much to build upon, there are significant challenges that demand attention if DFR schools are to be available to children and families five to ten years from now. Many of these challenges may appear daunting. Success will require embracing and adopting the vision for DFR schools, and the cooperation and commitment from stakeholders throughout the Diocese. Looking ahead, the Diocese must embrace a culture shift from a reactive posture of “living to fight another day” to a proactive posture of collectively working toward a vision of excellence at every level. The recommendations that follow are intended to set the pathway toward that vision.

Academic Excellence Subcommittee

- 1. Define clear Diocese-wide standards for academic quality to be achieved at the school level and develop accountability measures to ensure continued progress toward academic excellence across all DFR schools.**
 - a. Establish Diocese-wide criteria to assess the academic quality of each school based on educational outcomes, focused on both student proficiency and progress; align academic quality standards with State and Federal learning standards; ensure the academic quality standards reflect the high expectations associated with a Catholic Education.
 - b. Establish uniform guidelines for standardized testing and student assessment; implement guidelines and provide training for the application of student performance data in school-based decision-making that is consistent with best practice; leverage existing and/or invest in new platforms for assessment and data management that allows the CEC access to academic data and enables schools to effectively manage daily operations.
 - c. Provide technical assistance to schools, enabling teachers and administrators to utilize student performance data to differentiate instruction and align curriculum.

- 2. Ensure consistent practice and organizational support from appropriate Diocesan offices and clergy in the religious education of students across DFR schools.**
 - a. Coordinate with the Religious Faith Formation Office to establish religious education learning outcomes; provide training and support to religious education instructors at DFR schools as needed.
 - b. Establish uniform guidelines for student assessment of faith and values; provide training for the application of assessment data in school-based decision-making that is consistent with best practice.
 - c. Define the role of the pastor or chaplain (in the case of middle/ high schools) as the spiritual head at each DFR school.

- 3. Establish educational policies to guide and support schools in their efforts to best meet the emergent special education, social-emotional, and English language learning (ELL) needs of their student populations.**
 - a. Assist DFR schools to set enrollment strategies for students with varying special education, social-emotional, and English language learning (ELL) needs.

- b. Establish guidelines and minimum school resource requirements for those schools that enroll students with special education, social-emotional, and ELL needs.
 - c. Ensure adequate staffing and training to support students with special education, social-emotional, and ELL needs; particular attention should be devoted to developing school protocols for student evaluation and diagnosis with respect to special education, social-emotional, and / or ELL needs.
 - d. Provide guidance and assistance to DFR schools that are not able to meet special education, social-emotional, and / or ELL needs in providing a referral to another DFR school or alternate school as needed.
- 4. Ensure continued investment in the instructional quality of the school by developing a supportive work environment and a culture of accountability that attracts and retains high-performing educators.**
- a. Set standards and multi-year targets to increase teacher salary and benefits¹ to levels that align to competitive wage standards. Integrate targets into financial plans and communicate a human resources plan to achieve those targets within the time horizon.
 - b. Invest strategically and consistently in a central professional development fund for teachers to pursue workshops and continuing education courses that are relevant to their professional and instructional needs; particular attention should be devoted to professional development for integrating technology in the classroom and differentiating instruction for students.
 - c. Work in partnership with local colleges and universities to provide professional development resources for staff and faculty.
 - d. Set system-wide guidelines for school principals to conduct annual teacher performance evaluations to ensure accountability and help teachers improve their practice; align the process for teacher performance evaluations with best practices.
- 5. Ensure continued investment in school leadership by establishing system-wide guidelines and processes for hiring, training and retaining high performing administrators.**
- a. Refine and formalize job descriptions for school-based leadership; clarify the role of the principal as the academic and operational head of school; ensure adequate staffing for additional administrative duties that include but are not limited to financial management, development, facilities maintenance, and guidance counseling.
 - b. Set standards and multi-year targets to increase administrator salary and benefits to levels that align to competitive wage standards. Integrate targets into financial plans and communicate a human resources plan to achieve those targets within the time horizon.
 - c. Invest strategically and consistently in a central professional development fund for administrators to pursue workshops and continuing education courses that are relevant to their professional administrative needs; particular attention should be devoted to both initial as well as ongoing professional development.
 - d. Establish annual principal performance evaluations to ensure accountability and help administrators improve their practice; the process for principal performance evaluations should align with best practices; for parish schools, the CEC will develop appropriate tools for assessment/evaluation and technical assistance to pastorates for implementation; CEC will conduct the performance evaluation at the request of pastorates as needed.

¹ Benefits may include health and dental insurance, retirement, tuition reimbursement for faculty, and tuition discounts for dependents.

- e. Define and formalize the selection process for pastors with schools in their parish; clarify the role of the pastor as the spiritual leader and in providing administrative support to school-based leadership.
- f. Invest strategically and consistently in a central professional development fund for school-based pastors to provide preparatory training and ongoing professional development in order to be effective in their roles.

6. Articulate criteria to assess academically distressed schools and develop strategies to improve school performance.

- a. Identify schools that are not meeting academic quality standards.
- b. For each identified school, develop an academic improvement plan with clear performance targets and timelines in each case.
- c. For these same schools, explore providing short-term operating capital and/or restructuring school-based leadership and instructional staff with appropriate guidance and adequate oversight from the CEC.

Enrollment Subcommittee

- 1. Ensure consistent investment in the quality of each school on multiple levels in order to be competitive in a changing market.**
 - a. Per the recommendations in the Academic Excellence section, define and invest in the academic quality of DFR schools to strengthen their appeal to prospective students and families seeking high-performing schools.
 - b. Prioritize and budget for capital improvements and technology integration as critical to both the marketing and performance of DFR schools.
 - c. Hire and train staff with culturally competent skills to support efforts to increase enrollment of racially and ethnically diverse student populations; examples include hiring an interpreter or guidance counselor, or providing professional development on the impact of culture on the behaviors and attitudes of diverse populations.
 - d. Ensure religious presence at each of the DFR schools; at parish schools ensure deep pastor engagement.

- 2. Implement strategies to stabilize and grow enrollment across the Diocese.**
 - a. Monitor each schools' entering class size, attrition, and total enrollment at the CEC.
 - b. In collaboration with the CEC, establish enrollment plans with targets that balance access and affordability, student diversity and the overall financial sustainability of each school.
 - c. Focus marketing/outreach efforts to maximize enrollment at key entry points, such as pre-K and transition points in the surrounding public school system.
 - d. Provide transparent and timely information about academic quality and financial aid to parents who are considering enrolling students in a DFR school.
 - e. Develop appropriate marketing platforms both locally and centrally (housed at the CEC); particular attention should be devoted to effective marketing practices, such as word of mouth, social networking and digital strategies.
 - f. Develop and foster professional networks with local public and private school leaders within each Deanery to take advantage of collaboration opportunities, particularly prospect referral.

- 3. As needed, develop responsive approaches to mitigate barriers to enrollment caused by the changing market environment.**
 - a. Increase affordability for families by working with the CEC to adopt financial aid best practices that may include:
 - Increasing school-provided financial aid;
 - Establishing/expanding financial aid counseling for families to apply and secure tuition assistance from multiple sources²;
 - Developing comprehensive financial aid packages for families that integrate multiple sources of tuition assistance.
 - b. Build and launch multi-year strategy to target and enroll more racially and ethnically diverse student populations, particularly in urban areas with large Hispanic populations in the public schools.
 - c. Consider restructuring the grades served at each school in order to align to public school transition points and maximize enrollment opportunity.

² Sources of financial aid may include but are not limited to school-provided tuition assistance, FACE scholarship awards, parish subsidies, multi-child discounts, and outside scholarship opportunities

4. **Align marketing and outreach activities to best practices and expand overall capacity where needed.**
 - a. Develop central branding and messaging that broadly promotes Catholic education in the Diocese to parents, funders, and parishioners; particular attention should be devoted to a message of renewal with a focus on increasing enrollment and fundraising.
 - b. Ensure adequate marketing and communications staffing with appropriate skills exists at the local and/or the CEC levels.
 - c. Provide professional development on marketing, outreach and admissions for school and board leadership.
 - d. Encourage DFR schools to share best practices and engage in collaborative marketing efforts, particularly at the Deanery level.

5. **Establish Diocesan-wide shared responsibility for promotion of DFR schools.**
 - a. Define the roles and responsibilities for all Diocesan entities for supporting recruitment efforts, that may include promotional events, distributing marketing collateral, building community networks in support of Catholic education, etc.³
 - b. Foster a collegial and noncompetitive culture amongst schools at the regional/Deanery level that maximizes collaboration in marketing, prospect referral, and other enrollment strategies.
 - c. Change central policy to permit all schools to disseminate marketing materials and hold promotional events at all feeder schools, parishes, and faith formation classes in the Diocese regardless of Deanery; establish guidelines, processes and technical assistance to enable parishes to share parishioner contact information for school marketing and outreach.

³ The Diocesan entities include: the CEC, school administrative teams, the sponsoring pastor/parish, and all other DFR pastors/parishes

Finance Subcommittee

- 1. Create uniform system-wide processes for responsive financial management and reporting guided by the CEC.**
 - a. Transition all schools to accrual-basis accounting.
 - b. Implement centralized accounting strategy that allows both the CEC to access financial data as well as enables schools to manage daily operations.
 - c. Establish uniform financial controls, including budgeting and reporting formats and processes at the local and system levels.
 - d. Establish basic levels of financial oversight at all schools, including a clear charge and composition of a finance committee of the school board.
 - e. Monitor local financial results at the CEC; provide guidance to schools as necessary.
 - f. Conduct external financial review/ audits at the local and system level on an annual basis.
 - g. Ensure adequate staffing with appropriate skills exists at the local and the CEC levels.
 - h. Provide professional development on budgeting and financial management for school and board leadership.

- 2. Establish financial policy that aligns to best practice, and is consistent and transparent, while also addressing holdover issues.**
 - a. Separate financials of all entities under the CEC umbrella, with each responsible for its own bottom line, and establish a clear approach for providing operating funds to Diocesan schools.
 - b. Establish clear mechanisms for funding the CEC.
 - c. Make diocesan schools with positive clearing account balances whole on a cash basis over time, and forgive negative balances as “uncollectable” debt.
 - d. Discontinue process of funding operating deficits through non-collection of unpaid Chancery bills; implement clear collections procedure for arrears and communicate results of nonpayment.
 - e. Forgive accrued Chancery debt at parish schools related to unpaid operating expenses as “uncollectable” debt; establish clear mechanism for providing operating funds to parish schools.
 - f. Track and budget for necessary capital improvements at all schools.

- 3. Develop tuition and financial aid policy and guidelines to optimize revenue and access to enrollment, guided by the CEC.**
 - a. Empower the CEC to ensure schools have clear guidelines regarding financial aid eligibility and application process; separate award process from the Foundation to Advance Catholic Education’s (FACE) charge.
 - b. Expand CEC capacity in order to provide technical assistance (including financial analysis, enrollment analysis, and forecasting) to school leaders in developing their school’s tuition and financial aid strategy.
 - c. Communicate financial aid process, policy, and awards to parents and prospective families in a timely and transparent manner.

- 4. Maximize revenue for Catholic education by promoting Diocesan-wide shared responsibility while pursuing external funding opportunities.**
 - a. Educate all pastors on the financial needs of the schools and communicate the principle that funding schools is a Diocesan-wide responsibility; encourage all pastors to extoll the ethos of shared responsibility from the pulpit.
 - b. Create local or shared development positions staffed with qualified professionals to reinvigorate and grow school-level fundraising.
 - c. Invest in and grow the annual Catholic Charities appeal; designate a portion of the annual appeal for support of Catholic education.
 - d. Establish a uniform, enforceable policy that ensures the provision of parish subsidies for all Catholic school students within the Diocese.
 - e. Establish a clear policy to direct a portion of the proceeds from school real estate sales and/or leases to support our schools.
 - f. Hire a central employee dedicated to maximizing available government funding if analysis suggests that the financial benefits would be likely to outweigh the up-front costs.
 - g. Focus FACE activity on expanding a base of community philanthropic support for scholarships and other critical investments, such as facility and technology improvements; expand qualified professional staff to grow overall fundraising revenue.
 - h. Continue to be involved in advocacy activities related to state subsidies for parochial education.

- 5. Explore providing short-term operating capital for schools in financial distress with adequate oversight from the CEC.**
 - a. Identify schools that are at immediate risk of becoming financially non-viable in the absence of Chancery or cross-subsidy funds.
 - b. Expand CEC capacity in order to provide technical assistance to develop a financial plan with clear performance targets in each case; if appropriate, provide short-term operating capital and/or allow schools to use existing independently-raised endowment funds to support transition to a sustainable financial model.

Governance Subcommittee

- 1. Build the capacity of the CEC to ensure delivery of effective support to DFR schools and consistent implementation of recommended policies and practices.**
 - a. Build a staff team to provide expertise and support in financial management and planning; academic quality standards and student data; human resources; communication/marketing; facilities and technology.
 - b. Facilitate strong cross school collaboration within Deaneries to secure resources, financial and other, to support the needs of student populations.

- 2. Establish a centralized Catholic School Board of Limited Jurisdiction, reporting to the Bishop, with authority to oversee CEC leadership; set system wide policies, practices and plans; provide financial oversight; and oversee the implementation of Task Force recommendations as approved by the Bishop⁴.**
 - a. Develop a central Catholic school board⁴ for the Fall River Diocese made up of members from affiliated clerical, academic, professional, and geographical representative bodies.
 - b. Empower this board to oversee the implementation of the Task Force recommendations in addition to oversight of the following responsibilities:
 - Recruitment, oversight, evaluation and retention of CEC leadership in close collaboration with the Bishop
 - Fulfillment of mission
 - Development of system-wide policies, standards and best practices with respect to DFR schools' academic quality, financial management, human resources, marketing, enrollment, operations and program model
 - System-level strategic planning and plan implementation
 - System-wide fiduciary oversight and accountability
 - System-wide financial aid best practices
 - Brand development and management, marketing and communication
 - Development goals and strategies
 - Monitoring and evaluation of the progress of all schools, quality and adherence to educational standards
 - c. Enhance the role of local DFR school advisory boards by instituting consistent system-wide governance policies and practices to address such issues as board make-up and recruitment, roles and responsibilities, terms and term limits, percentage of parents serving, conflict of interests and code of ethics.

- 3. Provide leadership training for those involved in the governance of the schools including Heads of Schools, Principals, Pastors and Board members.**
 - a. Provide for annual self-evaluation for members of school advisory boards and the central board.
 - b. Provide professional development for heads of schools and principals as to the functioning of boards and how to work in partnership with them.
 - c. In collaboration with the Bishop, ensure that pastors that are assigned to schools or clusters of schools have a strong interest in Catholic education and are willing to be actively visible within and supportive of the local school community.
 - d. Provide training, as applicable, to pastors on working in partnership with boards and school leaders.

⁴ For reporting structure, refer to chart in the appendix

Financial Implications

The preceding recommendations indicate the need for a substantially larger level of investment in order to realize the vision of a coordinated system of schools that is positioned to thrive in the 21st century. The recommendations call for a school system wherein each school is resourced to help each student reach his or her potential academically and spiritually; one that has competitive and just employment practices; and one that is financially sustainable, well-managed, coordinated, and capable of responding to changing demographics, competition, educational, and technological developments.

The purpose of this section is to summarize the cost and revenue implications if the forgoing recommendations are adopted. Implementation would be a multi-year effort, with costs prioritized and budgeted as revenues become available over time. Additional detailed, collaborative planning and analysis at the Chancery, Catholic Education Center, and school levels will be required over several phases of iterative implementation to fully develop a path to financial sustainability for the system of schools as a whole.

Implied Costs

There are three categories of cost implication to consider when assessing the total expense of adopting these recommendations: one-time costs, CEC-level operating costs, and school-level operating costs.

One-time costs are necessary to strengthen systems and infrastructure in order to create the platform for success. There would also be one-time costs involved in forgiving accrued debt and in dismantling the integrated Diocesan school financial system. These costs include:

- Up-to-date tools for standardized testing, student assessment, and data management within the CEC and at schools;
- Up-to-date accrual-based accounting tools, potentially integrated at an enterprise level, based at the CEC;
- Baseline capital improvements and updated technology for K-8 school buildings;
- Temporary external support to develop strategies for schools in financial or academic distress;
- Debt forgiveness for parish schools that have accrued arrears to the Chancery for unpaid bills and Diocesan schools that have accrued deficits within the CEC clearing accounts; and
- Cash restoration for Diocesan schools that have accrued surpluses within the CEC clearing accounts.

Ongoing Catholic Education Center costs are the new costs necessary to create a centrally funded CEC with a vastly expanded charge to provide services to the schools that include: setting system-wide guidelines, monitoring system-wide performance, and providing a range of resources and assistance.

In addition to its current human resources, standards and testing, and financial management responsibilities, the new CEC would:

- *Work with school leaders and the central school board to create and monitor system-wide guidelines for academic quality, special needs services, leadership roles and responsibilities, employee performance, marketing, financial management and oversight, financial aid best practices, and advisory board functioning.*
- *Assume responsibility for creating shared resources and capacity, including a comprehensive professional development program for school leaders, parish school pastors, and teachers on both academic and operational topics; performing evaluations of lay leadership; implementing a*

centralized marketing program; coordinating annual financial audits; and distributing centralized financial aid dollars.

- *Partner with individual schools* on an ongoing basis to help them integrate student data into their practices, determine how they can best serve students with special needs, develop enrollment and financial strategies, implement sound financial management and oversight practices, and market themselves effectively. The CEC would also work with distressed schools on turnaround strategies.
- *Facilitate planning for the collective system of schools.*

The additional costs associated with this expanded charge would include:

- Ongoing systems costs, including auditors, student assessment and data tools, and financial management tools;
- Professional development fund for teachers, administrators, and parish school pastors;
- Staff capacity for marketing activities;
- Staff capacity for financial analysis and planning functions; and
- Administrative capacity to support the general functioning and oversight charge of the central board.

Ongoing school-level costs are the new costs necessary to ensure schools have the resources they need to meet CEC guidelines for academic and operational success. Local school budgets must grow over time to ensure that schools are positioned to hire, compensate, train, and retain high-quality teachers and administrators, address capital improvements and technology needs in a timely manner, put staff in place as necessary to ensure cultural competence and address students' special needs, and add appropriate staff for finance and marketing such that leadership has sufficient capacity to focus on the instructional and operational leadership that creates student success. The additional costs associated with meeting these standards would vary at each school; Diocesan middle and high schools are generally better-resourced than K-8 schools. Depending on the individual school and its needs, additional costs may include:

- Ongoing training for administrators and teachers in using student data to inform decisions and instruction;
- Dedicated staff to support special needs, and related ongoing training for classroom teachers;
- Dedicated staff to create cultural competence, and ongoing training for classroom teachers;
- Administrative capacity with appropriate skills for finance and marketing;
- Growth in teacher and administrative salaries to meet competitive targets; and
- Annual appropriations for capital and technology reserves.

Sources of Revenue

The recommendations suggest a range of funding sources for the Catholic schools are needed; it is clear, however, that the Diocese cannot provide all the resources required. The following recommendations include a significant emphasis on private philanthropy which is also highlighted in the next section on implementation:

- **Chancery resources** would:
 - Support ongoing central operations by funding the CEC;
 - Provide a transparent level of direct subsidy to the schools on at least a temporary basis;
 - Address one-time holdover issues by forgiving debt and restoring funds to Diocesan schools with positive balances at the CEC; and
 - Support a portion of one-time needs for capital improvements and/or costs related to turnaround, transition, or restructuring by directing proceeds from school real estate sales or leases.

- **Parish resources** would provide mandatory direct student subsidies.
- **Private fundraising** would:
 - Provide school budget relief through FACE, by expanding centralized scholarship dollars, and send a recommendation to the FACE board to reconsider and revise its distribution policy to allow for full scholarship award, rather than 50% limit.
 - Provide school budget relief by using FACE assistance to optimize k-8 fundraising activities for other critical investments, such as operations and capital/technology improvements.
 - Provide CEC and/or school budget relief through the Catholic Charities appeal, by expanding general annual fundraising for Catholic school operations.
 - Provide school budget relief through local or shared fundraising positions at middle/high schools that increase school-based funding for operations and capital improvements.
- **A centralized government revenue staff person** would maximize school operating revenue from government sources.
- **Growing tuition receipts** from improved enrollment would provide school budget relief, driven by:
 - Marketing/promotion efforts; and
 - Tuition pricing and financial aid strategies that increase accessibility and maximize filled seats.

Acknowledgements

This year-long process has relied upon the energy, hard work, engagement and dedication of many people.

First, we wish to thank the Task Force members who gave this effort so many hours of their time – studying the research, visiting the schools, and participating in many meetings and productive conversation. This work is most appreciated.

We would also like to thank parents, teachers, principals, pastors and advisory board members who responded to surveys, participated in focus groups, hosted site visits, and spoke with Task Force members. These conversations and the feedback the Task Force received made the data collected and analyzed come alive and provided important on-the-ground nuance to our understanding of this system of schools.

We are grateful to Diocesan and Catholic Education Center staff who provided important data and the many hours of their time to supply the context needed to make sense of it.

Finally, we thank Bishop da Cunha for placing his trust in the members of the Task Force and inviting our participation in this important endeavor.

Appendix

Bishop da Cunha's Guiding Questions

1. How can we strengthen the financial viability of the Catholic Schools of the Diocese of Fall River?
2. What consideration could be given to the concept of more broadly sharing the financial responsibility for Catholic schools among all the parishes of the Diocese? What approaches would be best if it were advisable to do so?
3. How many, and in what configurations, can Catholic schools of the Diocese be sustained and strengthened over the next several years, and into the long-term future?
4. How can Catholic schools increase enrollment, including greater participation of families within the Hispanic community?
5. What additional sources of funding may be identified and/or expanded for financial support of Catholic schools, and for families in need of tuition assistance?
6. What resources can be identified to upgrade our school facilities to meet the needs of our 21st century students?
7. How can the diocese strengthen the leadership of its Catholic schools, including consideration of:
 - a. Professional Development addressing institutional leadership, e.g. boards, marketing, advancement, etc.
 - b. Professional Development for administrators and teachers relating to the academic excellence and spiritual mission of the schools
 - c. Financial support for those pursuing advanced coursework for advanced degrees, particularly in school leadership/administration in order to serve in our Catholic schools.
8. How can Catholic schools best meet the needs of current and future students through an academically rigorous, faith-based education grounded in a commitment to academic excellence and strong Catholic identity?

Subcommittees' Charge and Research Goals

Academic Excellence Subcommittee Charge

The Academic Excellence Sub-Committee shall advise and make recommendations regarding actions to be taken to help strengthen the academic quality of the Catholic schools in the Diocese of Fall River. The Sub-Committee will review key performance indicators of school academic quality in addition to the resources that are in place to ensure academic excellence. Additionally, the Sub-Committee will consider approaches that might be taken to maintain and/or improve student performance and teacher and administrator quality. Finally, the Sub-Committee will examine and propose strategies to attract and retain excellent teachers and school leaders who also embrace the faith and values of the Catholic schools as well as innovative and best practices approaches to teaching and learning.

Academic Excellence Subcommittee Strategic Questions

1. How can the Catholic schools of the Diocese of Fall River best meet the academic needs of current and future students?
2. What changes are needed in order to maintain or improve the academic quality Catholic schools of the Diocese?
3. How might the Diocese strengthen school-based leadership and instructional staff through strategic hiring and retention, as well as access to advanced coursework and professional development?

Academic Excellence Research Questions

Academic Quality

1. What are the academic outcomes for each Catholic school, its region and the Diocese?
 - What do the standardized test score trends look like for each school for the past 3-5 years?
2. How is each school and the collective system approaching the topic of faith and values? What can we learn about the outcomes of those efforts?
 - What practices are in place at each school to impact the faith and values of the students?
 - What do the test faith and values test score trends look like for each school for the past 3-5 years?
3. To what extent are the Catholic schools preparing students for high school and college?
 - What are the college placement test scores for 12th graders?
 - Where are 8th and 12th graders placed after graduation?
 - Do graduates require remedial coursework at their post-graduation placement?
 - Do high school graduates complete their post-graduation course of study, and if so, how long does it take?
4. What degree of tenure and professional qualifications do teachers and administrators have at each school, cluster of schools in each deanery and the school system as a whole?
5. What is the nature and extent of the professional development that is provided for teachers, administrators, and school pastoral leaders?
 - Is this level of professional development sufficient to ensure academic quality? If not, what is needed?
6. What is the current state of resources to support teaching and learning for each school?
 - Are current resources adequate to maintain academic quality at each school? If not, what is needed?
 - What type and level of support does each school receive from community or school based partnerships?

External Research to Inform Academic Quality Questions

7. How do we compare to both our local competitors and the state as a whole in terms of academic outcomes?
 - How does the Catholic school student performance data compare to competitor and state averages?
8. How do we compare to both our local competitors and the state as a whole in terms of teachers and administrators?
 - How do teacher and administrator tenure and qualifications at the Catholic schools compare to competitor and state averages?
 - How do the teacher and administrator salary levels of the Catholic schools compare to competitors and state averages?
9. What can we learn from other schools and Dioceses that have successfully implemented strategies to strengthen academic quality?
 - How have public and Catholic schools in comparable markets approached the issue of teacher and school leader qualifications and compensation?
 - How have other Dioceses approached the challenge of recruiting, developing and retaining school leaders?
 - How have public and Catholic schools in comparable markets developed and utilized community and school partnerships to improve academic quality at their institutions?
10. Are there opportunities for cost-effective higher-education partnerships that can provide professional development and/ or a human capital pipeline for teachers and/or administrators?

Enrollment Subcommittee Charge

The Enrollment Sub-Committee shall advise and make recommendations regarding actions to be taken to help stabilize, increase and sustain enrollment of the Catholic schools in the Diocese of Fall River. The Sub-Committee will compare current trends in school enrollment to regional demographic trends in order to identify market opportunities. In addition, the Sub-Committee will examine the educational competitive landscape for each geographic market and propose scenarios to better position the Catholic school system to sustain enrollment over time. Finally, the Sub-Committee will review current operations that drive enrollment and consider possible approaches to strengthen the marketing and enrollment functions of each school and the school system as a whole.

Enrollment Subcommittee Strategic Questions

1. What approaches can be taken to stabilize and grow enrollment within each school, deanery and the Diocese as a whole?
2. How can the Catholic schools of the Diocese attain greater participation from families and students who are not part of the current core demographic, with a particular focus on the Hispanic community?
3. What scenarios might we consider to strengthen the Catholic schools' position in the market?
4. How can the Diocese strengthen the institutional leadership and administrative capacity of its Catholic schools to improve the marketing of schools and increase enrollment? What cooperative efforts can parishes and schools undertake?

Enrollment Subcommittee Research Questions

Enrollment Trends and Related Factors

1. What is the current enrollment for each school, the cluster of schools in each deanery and the collective school system?
 - What do the baseline enrollment and student demographic trends look like for each school, its region and the Diocese for the past 10 years?
 - What is the current capacity and utilization for each school?
 - Are there clear entry and exit points clustered around certain grades?
2. What are the key factors that motivate families to enroll their children? What factors influence family/student attrition and retention?
 - Hypotheses include satisfaction, perception of school quality, high school and/or college readiness, cost, location, transportation, etc.

Enrollment and Marketing Management & Operations

3. What structures and systems are in place to manage the marketing, community outreach, admissions and enrollment function at each school and the Diocese?
 - What are the policies, strategies and practices for marketing, outreach, admissions, financial aid and enrollment?
 - How are the marketing, outreach, admissions and enrollment roles staffed at each school and the Office of Catholic Schools?
 - What roles do the parishes, deaneries and Diocese play in the marketing of schools?
 - Who supports the organizational development and professional development of key roles that include marketing, community outreach, admissions and enrollment?

External Research to Strengthen Enrollment

4. What is the current market for each Catholic school?

- What are the regional demographic trends and population projections for each school, cluster of schools, and the Diocese?
- What are the adjacent markets that could be targeted for outreach and enrollment?
- 5. How does each of the Catholic schools compare to its competitors on cost, quality, educational service offerings, accessibility etc
- 6. What can we learn from Dioceses that have experienced success at stabilizing or increasing enrollment in comparable markets?
 - How are other Dioceses responding to the national trend of declining enrollment in Catholic education?
 - What are the best practices for staffing and providing professional development for school marketing, outreach, admissions and enrollment departments?
 - What can we learn from other Dioceses who have successfully reached out to new demographics?

Finance Subcommittee Charge

The Finance Sub-Committee shall advise and make recommendations regarding actions to be taken to help strengthen the financial position of the Catholic schools in the Diocese of Fall River. The Sub-Committee will review and consider potential models for sharing financial responsibility among schools, parishes and/or the Diocese of Fall River. Finally, the Sub-Committee will examine and propose scenarios for Catholic schools in the Diocese of Fall River that could strengthen and sustain the quality and financial viability of the system over time in order to provide funding for all students who want a Catholic education.

Finance Subcommittee Strategic Questions

1. How can we strengthen the financial sustainability of the Catholic schools of the Diocese?
2. What changes might be needed in the structure, systems and/or administration of the Catholic schools of the Diocese that will increase their financial viability?
3. How can we ensure financial accountability for each Catholic school and the Office of Catholic Schools?
4. What scenarios in terms of the number and configuration of Catholic schools of the Diocese could improve the financial viability of the system?
5. What is the collective vision of the Diocese regarding access to Catholic educational services? For example, is the goal to provide funding for all students who want a Catholic education?

Finance Subcommittee Research Questions

Financial Performance

7. What is the current financial performance for each school, the cluster of schools in each deanery and the collective school system?
 - What are the revenue and expense drivers for each Catholic school, its region and the Office of Catholic Schools?
 - What do the revenue, expense, and net income trends look like for each school and the Office of Catholic Schools for the past 5 years?
 - What is the cost per pupil on a per school basis?
 - What are the underlying dynamics in key areas of the schools' business models, including tuition, scholarships, fundraising, and teacher salaries?
8. What is the current state of capital needs for each school and the Office of Catholic Schools?
 - What are the annual and total deferred maintenance costs for each school and the collective group?
 - What is the current property asset inventory for each school and the collective school system? What are the policies and revenue strategies for property/facilities management and real estate sale?
 - What is the current state of technology to support teaching and learning? What would it take to align it to current best practice?

Financial Management & Operations

9. What structures and systems are in place to manage the finance function at each school and the Office of Catholic Schools?
 - How are the finance roles staffed at each school and the Office of Catholic Schools?
 - What oversight and accountability systems exist to manage financial performance?
 - What roles do the parishes, deaneries and the Diocese play in the financial management of schools?
 - What is the status of endowment funds for schools within the Diocese? What are the current investment policies? How are investments managed?

External Research to Inform Financial Questions

10. Can additional strategies and sources of funding be identified for financial support of Catholic schools and families in need of tuition assistance?
11. What can we learn from Dioceses that have had financial success in comparable markets?
 - What are successful models for shared financial responsibility?
 - How do other Catholic schools and Dioceses in comparable markets approach the questions of tuition and scholarships/ financial aid?
12. What are successful models for engaging parishes in sharing the financial responsibility for sustaining Catholic schools?

Governance Subcommittee Charge

The Governance Sub-Committee shall advise and make recommendations regarding actions to be taken to help strengthen the governance of the Catholic schools in the Diocese of Fall River. The Sub-Committee will review the current governance structures to articulate how they function for each school and the system as a whole. Additionally, the Sub-Committee will investigate best practices and models used by other Dioceses. Finally, the Sub-Committee will assess the strengths and weaknesses of the current governance structures in order to propose scenarios to strengthen governance.

Governance Subcommittee Strategic Questions

1. Do the current governance structures provide adequate oversight to ensure the schools are meeting their mission, including in the areas of finance, operations and academics?
2. What changes might be needed to the governance of the Catholic schools of the Diocese of Fall River to improve transparency, accountability and financial sustainability?
3. How can the growth and development of leadership skills among current and prospective members of governing bodies be supported?

Governance Subcommittee Research Questions

Governance Structure and Management

1. What structures and systems are in place to carry out the governance function at each school, the cluster of schools in each region and the Office of Catholic Schools?
 - What are the governance structures, roles and responsibilities for each school, the deaneries and the Office of Catholic Schools?
 - What are the specific roles of the advisory boards and their members?
 - How are advisory board volunteers identified and recruited?
 - In the absence of an advisory board, how do administrators and school leaders approach governance?

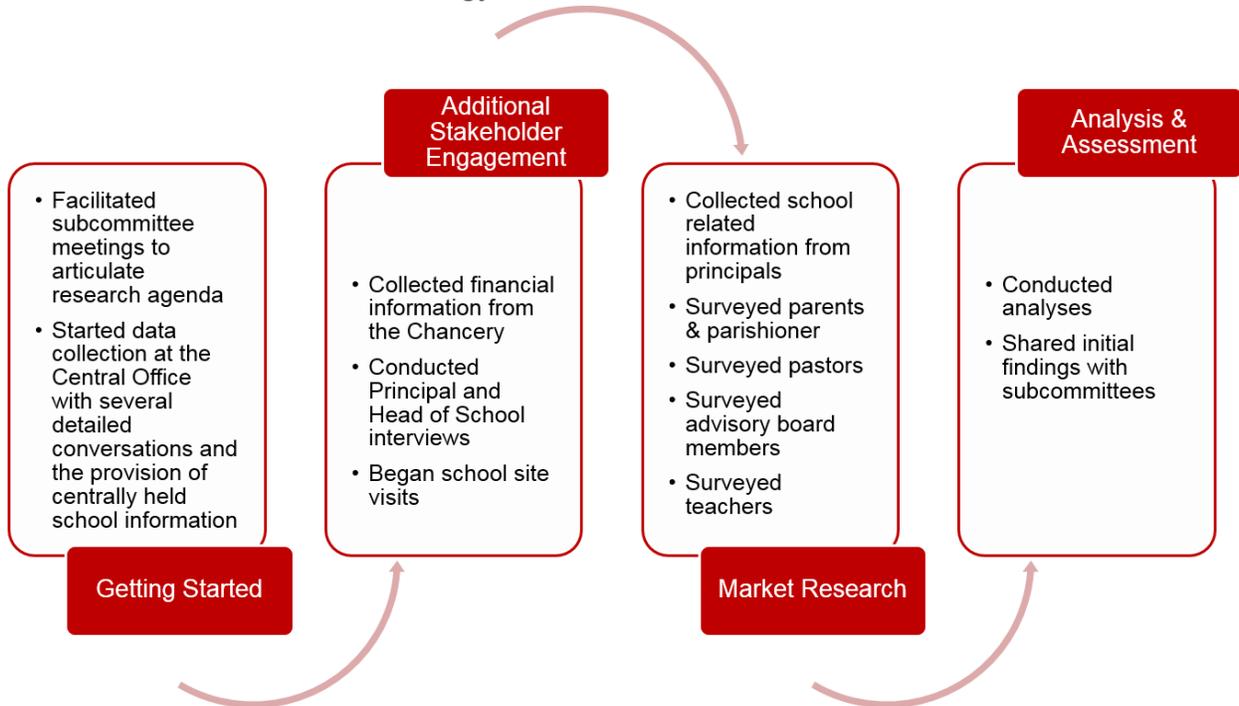
Governance Efficacy

2. What are the strengths and weaknesses of the current governance model?
 - Are roles and responsibilities for the governing bodies clearly defined?
 - Does each member of a governing body understand his/her role and responsibilities?
 - Do the governing bodies meet regularly and have access to the information necessary to fulfill their responsibilities?
 - Is there a need for education and training to help members of the governing bodies fulfill their roles effectively?
 - How effective is communication between management and the governing bodies?

External Research to Strengthen Governance

3. What can we learn from other Dioceses about effective governance?
 - What alternative governance models exist that could better meet our needs?
 - What can we learn from other Dioceses about effective implementation of governance changes?
 - What strategies have other Dioceses used to build leadership skills among current and prospective administrators?

Task Force Research Methodology



References

Internal Data Sources

Fall River Diocese Catholic Education Center provided data with respect to the following categories:

- Iowa assessment Data (3 years)
- COGATS data (3 years)
- SAT data (3 years)
- AP scores (3 years)
- Faith and Values fact sheet that includes the schools' faith and values standards
- Teacher/Admin qualifications and profiles (3 years)
- Teacher/Admin tenure and retention (3 years)
- Teacher/Admin salaries (3 years)
- Student parish participation data (5 year snapshot)
- Enrollment trends (10 year)

Fall River Diocese Chancery provided data with respect to the following categories:

- P&L detail for each school (5 years)
- P&L detail for fundraising, scholarship and additional subsidy (5 year)

DFR school principals provided data with respect to the following categories

- School enrollment capacity
- Student demographics
- Special education enrollment and details
- Student financial aid profile
- Teacher qualifications and certifications
- Teacher demographics
- Teacher professional development
- Graduation rates and post-graduation placement data resides at the school level (3 years)
- Administrative staffing and practice: marketing, outreach admissions, and finance
- Facilities status: deferred maintenance and capital expenditures
- School resource snapshot, including technology and school partnerships

TDC conducted primary research engaging the following stakeholders through various research tactics:

- DFR School Principals – phone interviews
- DFR School Advisory Boards – online survey
- DFR School Teachers – online survey
- Diocese of Fall River Priests – online survey
- Diocese of Fall River Parents – online survey

TDC and the Task Force conducted school site visits, which included the following:

- Interviews with school leaders
- School tour of facilities
- Teacher focus groups

External Data Sources

National Catholic Education Association

Massachusetts Department of Education Elementary and Secondary Education

United States Department of Education

The New England Association of Schools and Colleges

The Parents Alliance for Catholic Education

The University of Iowa, Iowa Testing Programs

The College Board

United States Census Bureau

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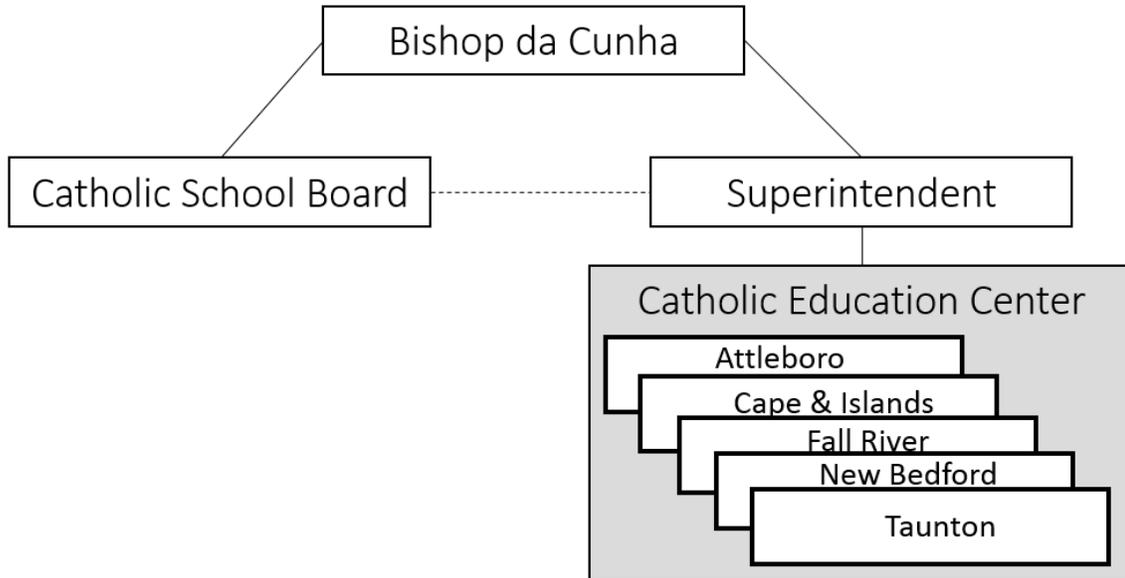
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Reporting Iowa Proficiency Using Standard Scores (Rep.). College of Education, The University of Iowa, Iowa Testing Programs (2015)

National Standards and Benchmarks for Effective Catholic Elementary and Secondary Schools (Rep.). Center for Catholic School Effectiveness, School of Education, Loyola University Chicago, in partnership with Roche Center for Catholic Education, Boston College (2012)

Catholic School Board Reporting Structure



Composition of Catholic School Board:

- 15-20 members
- Chancellor
- Deanery heads – clergy (5)
- Regional board representatives (5)
- At-Large Representatives (10)

Catholic School Board Duties:

- Recruitment, oversight, evaluation and retention of CEC leadership in close collaboration with the Bishop
- Fulfillment of mission
- Development of system-wide policies, standards and best practices with respect to DFR schools’ academic quality, financial management, human resources, marketing, enrollment, operations and program model
- System-level strategic planning and plan implementation
- System-wide fiduciary oversight and accountability
- System-wide financial aid best practices
- Brand development and management, marketing and communication
- Development goals and strategies
- Monitoring and evaluation of the progress of all schools, quality and adherence to educational standards

Composition of Catholic Education Center

- Superintendent
- Asst. Superintendents
- Accountant
- Other staff TBD

CEC Duties:

- Strategy - Contributes to FRD strategy
- FRD Policy implementation, review, remediation
- Finance
 - Individual School budgets & oversight
 - Roll-up & coordination with School Board
 - Tuition setting
 - Compensation (per FRD policies)
 - Local & regional fundraising
 - School-specific Capital Campaigns
- Leadership
 - Heads of School hiring & annual review
- Marketing & PR
 - Regional & local initiatives in alignment with Diocese brand, marketing & communication strategies
- Enrollment
 - Individual school initiatives