

# **Interactive Planning Process**

**Diocese of Phoenix  
Catholic Schools Office  
July, 2002**

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Catholic Schools Office  
Diocese of Phoenix

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## Introduction

Planning for the future of our schools is a universally recognized need. As we face the challenges and time constraints of meeting daily demands, we must take care to make planning a priority in order to ensure long-range viability.

“Where to begin?” and “How to develop plans that really move from the printed page into action?” These and other questions already are being asked throughout the Diocese of Phoenix as all schools participate in ongoing school improvement requirements for accreditation by the North Central Association and the Western Catholic Education Association.

The planning process may not be emphasized enough in the cycle of the school's self-study, therefore, the **Interactive Planning Process (IPP)** has been developed to help provide practical steps in planning for all of our schools.

The **IPP** comprises nine parts and a Diocesan Goal is set for each: Enrollment, Development and Marketing, Curriculum, Finance, Facilities Maintenance, Personnel Development and Retention, Technology, Student Life and Safety.

It is important to include all those who may have information or ideas that could help insure the future of the school in the process. Some of these key people include the principal, who generally initiates the process, parish pastor, faculty and school advisory board. Before the plan is finalized, these key people should have an opportunity to see the plan in total. In general, the broader the “ownership” of school plans, the greater the likelihood that those plans will become a reality.

Planning is not merely an end in itself. As you plan at the local level, please keep the diocesan goals in mind. The achievement of these goals may not be realistic in your school at the present time, but it is possible for you to move closer to these goals.

Please feel free to call the Catholic Schools Office at any time during the planning process.

As a result of this planning, the following should be submitted to the Catholic Schools Office:

- Updated Enrollment Component – every five years
- Curriculum, In-depth Studies – one subject – yearly
- Ongoing Curriculum Revision Form – yearly
- School Budget and End of Year Report – yearly
- Facilities Summary – areas of improvement and areas of need – yearly
- Personnel Projections – every five years
- Updated Technology Plan – yearly
- Student Life Profile – every five years

<b>Part I      Enrollment</b>
-------------------------------

**Diocesan Enrollment Goal**      **Each grade in each school will be filled, as defined by school policy, with additional students on a waiting list for each grade.**

Please send an updated Enrollment Plan to the Catholic Schools Office every five years. You do not need to send the answers to the self-examination portion.

**Actual**

1. Is your enrollment, in the past five years increasing, decreasing, or consistently even pattern?
2. Can you account for the pattern? If yes, how? If no, what information do you need to account for the pattern?
3. Where are your areas of strength and to what would you attribute these?
4.
  - a. If you are experiencing growth in enrollment, is it due largely to students entering the initial grade or throughout the grades? To what do you attribute this?
  - b. If you are experiencing decline in enrollment, is it occurring in a particular grade(s) or throughout? To what do you attribute this?
  - c. Trends: Can you identify trends, (i.e., ethnic, financial, demographics, CTODP)
5. What particular areas need attention?
6. Review your enrollment pattern from your last plan, if available. Has it changed? How? What do you attribute this?

**Projected**

7. What observations can you make about your enrollment in the past five years?
8. Complete your enrollment projections using the attached forms and directions.
9. Projections are estimates of the future based on the past. Are there any new or additional factors in your community, parish or school that make you question the validity of these projections? If yes, describe.
10. Do you see areas of concern in your projected enrollments? If yes, what are the concerns?
11. What are the positive and negative consequences of your projected enrollments?

12. Projections will ordinarily become true if what has been done in the past continues to be done. This can be positive or negative. Do you need to continue with what you have been doing, do something more, or do something different than you have been doing?

It must be acknowledged that some aspects of enrollment are beyond the school's control. For example, people may be moving out of your area. This may require a whole new strategy, perhaps busing, recruiting an additional percentage of available students, etc.

13. What did you learn from the projections you made five years ago? (if available)

### **Recruitment**

Consider recruitment:

14. What recruitment efforts were made in the past five years? Were they successful?
15. Who are the persons responsible for recruitment besides the principal?
16. What public relations and marketing is currently being done? Is it effective or not? How do you know? How would you measure?
17. What new recruitment efforts should be considered?

### **Attrition**

Consider student attrition. The persons most directly responsible are ordinarily the teachers and principal. Be sure that teachers are especially involved in discussions of attrition.

18. a. Is attrition a problem for your school at the present time?
- b. If yes, why? (Here actually interviewing those who have left the school is important. If this has not been done, it should be.)
- c. Exit interviews – Determine why students are leaving.
19. Are some changes necessary to keep students? If yes, what are some suggestions?



## Directions for Enrollment Projections

1. After the first full week of school, fill in current year enrollment. (Done on Sample.)
2. For the initial year (L, 1 or 9) enrollment for (2001/2002), average the current year and the previous five years for that grade. (Sample below.) Subsequent grade enrollments:
3.
  - a. Take your total enrollment in year 1 (2002/2003) and the current year. Find the difference. If the enrollment has gone up, this is a positive number. If the enrollment has done down, this is a negative number. (Sample below.)
  - b. For the current year, subtract the enrollment in the final grade (8 or 12), from the initial grade (K, 1 or 9). If the initial grade is larger than the final grade, this number is positive. If the initial grade is smaller than the final grade, this number is negative. (Sample below.)
  - c. Add 3.a. and 3.b. results. (Sample below.)
  - d. Divide result of 3.c. by the number of grades in your school. (Round to nearest whole number. (Sample below.)
  - e. Add the answer in 3.d. to each grade enrollment in the current year to get an enrollment projection for the following grade in 06/07.

### Sample

2.	32		
	30		
	29	<u>30.6</u>	Round to 31
	30	6/ 184	
	33		
	<u>30</u>		
	184		

3.a. 
$$\begin{array}{r} 250 \\ \underline{229} \\ - 21 \end{array}$$

3.b. 
$$\begin{array}{r} 30 \\ \underline{- 18} \\ - 12 \end{array}$$

3.c.  $-21+12 = -9$

3.d. 
$$\frac{-9}{9} = -1$$

## School Enrollment Data

School Number \_\_\_\_\_ School Name \_\_\_\_\_

	1	2	3	4	5	6	7	8	9	10	11	
	01/02	02/03	03/04	04/05	05/06	Avg	06/07	07/08	08/09	09/10	10/11	Max
PK												
K	32	30	29	30	33	31	+0	31				
1	29	28	29	29	30	29	+1	30				
2	35	29	28	30	31	31	-4	27				
3	24	31	30	26	30	28	+1	29				
4	26	24	27	28	28	27	+3	30				
5	17	20	20	20	21	20	+8	28				
6	29	16	21	21	22	22	+0	22				
7	13	25	14	20	20	19	-2	17				
8	28	31	25	14	19	23	-3	20				
9												
10												
11												
12												
Ungr												
Total	250	234	223	218	234	230	+4	234				

## Part II      Development and Marketing

### **Diocesan Development/Marketing Goal**

**Each school will identify and fulfill the definition of Development to its potential.**

### **Definition of Development:**

The overall concept of development holds that the highest destiny of an institution can be realized only by a total effort on the part of the institution to:

- Analyze its educational philosophy and activities
- Crystallize its objectives
- Project them into the future
- Take the necessary steps to realize them

Quality Catholic Education + Sound Business Practices + Effective Public Relations  
Attract Human and Financial Resources

1. Do you have a Development Plan that includes the following areas:
  - Quality Education
  - Business Management
  - Public Relations
  - Major Gifts Estate Planning
  - Volunteers
  - Industry
  - Insurance
  - Catalog of Gifts
  - Fund Raising
  - Boards
  - Blue Ribbon Committee
  - Recruitment Alumni
  - Endowment
  - Planning
  - Case Statements
  - Foundations
  
2. Do you utilize development terminology and mind opening word in your communication? (See attached list)
  
3. Do you have a Development Director or Development Committee with the following characteristics?
  - Integrity
  - Understanding and enthusiasm for your school
  - Ability to be an extension of the office of the principal - - to represent the principal's aims and objectives at all meetings and activities
  - Accepts responsibility
  - Establishes high standards of self and others
  - Self-starter (considerable personal initiative)
  - Personally motivated and the ability to motivate others
  - Schedules own time and activities of others (lives up to a schedule)
  - Ability to work hard for sustained periods (robust health)
  - Ability to communicate (especially through written word)

- Personality (gets along with others)
- Sense of appropriateness (sense of timing)
- Being numerate, as well as, literate
- Experience in development or related activities

4. Does your Development activity look different than fund raising (see attached comparison)

5. Does your Case Statement include:

- Rational for existence of the school
- Demonstration of the school's productivity and benefit to society
- Presentation of ways to improve its service to society and the resources required

6. Is the writer of the Case Statement:

- Direct and brief, but thorough
- Writing only statements which are supportive and defensible
- Stressing the future
- Writing for the donor
- Emphasizing as many strengths as possible
- Positive and optimistic without being unrealistic
- Rational and emotional

7. Does your school have an Endowment Fund?

Endowment funds are significant, they consist of funds that have been set aside by a school and invested in order to produce income. An endowment fund suggests the future.  
Education + Commitment + Time = Endowment Growth

8. Does your school have an Annual Fund?

The successful Annual Fund involves people in your ministry. It enables your school to test its case. Annual Fund educates donors regarding your mission, goals and needs. Your school will broaden its base of financial support. It will also encourage donors to adopt an Annual giving habit.

9. Do you have an Annual Report?

It is the description of those events, programs and activities that were important and successful. You comment on those items that still need attention. A brief glimpse into the school's future hopes and dreams is also provided.

10. Do you have a Gift Catalog?

People give to people. People need information, interest, motivation and opportunities for investing. The gift opportunities need to meet the investor's interest.

Elements of a Gift Catalog:

- Clear statement of the need
- Need related to total school program
- Cost of item (new and used)
- Cost of endowment package
- Challenge aspect
- One item

11. Who are your internal and external publics?
12. How do you communicate with your publics?
13. Does your public relations program establish some broad base objectives?
14. Does your program determine long and short-term goals?
15. Have you assessed the availability of financial resources and human resources to accomplish your objectives?
16. Who is ultimately responsible for public relations at your school?
17. Does your Public Relations Program have the following components:
  - Become functional part of development
  - Have confidence of and access to principal
  - Communicate the mission of the school
  - Show how the mission is reflected in action
  - Highlight the public interest
  - Stress the school's successes
  - Communicate right image to key publics
  - Identify key publics
  - Show good stewardship
  - Strengthen management of public relations department
18. What forms of public relations does your school actively participate in?
19. Why does your school need public relations?
20. Who is ultimately responsible for public relations at your school?
21. Is the Local School Board involved in public relations? How? If not, should it be?
22. How do you coordinate public relations efforts?
23. Is there a formal process?
24. How would you improve public relations at your school?
25. In the next year, what school events/students activities should be communicated to the public? What efforts will be made? Who will be responsible?
26. Identify your school's three best qualities. Coordinate an effort to relate those qualities to your public.
27. Think of your school's three best qualities. Coordinate an effort to relate that to your public.
28. In the next year, what school events/student activities should you communicate to the public?

29. Do you recruit and train volunteers for your development program?

Volunteers can be recruited from:

- Church
- Corporations
- Fraternal Organizations
- Civic Associates
- Retiree Groups
- Co-Workers
- Family
- Friends

30. Volunteers can be donors because they understand and believe in the mission. They will advocate for your programs and services. Volunteers are also personally involved and committed to the school.

31. Is everyone connected to your school involved in the development effort?

- Volunteers
- Donors
- Staff
- Board

## Glossary – Development Terms

We invite investments	not	beg for help.
Invite to share	not	ask to give.
Provide options	not	remind of obligations.
Become involved	not	work for.
Recruit students	not	threaten parents.
Become distinctive	not	be all things to all people.
Be mutually supportive	not	competitive.
Promote development	not	fund raising.
Provide long-range planning	not	crisis orientation.
Report out facts	not	hide weaknesses.
Broaden base	not	raise tuition.
Expand to total education	not	cut back to Catechesis/performance
		Must match the promise.

### Mind Opening Words

Invest working capital  
 Buy dividend– paying stocks  
 Champion endorse  
 Improve  
 Benefits  
 Improved  
 Privileges and responsibilities  
 Personal liberty  
 Friendliness, appreciation  
 Facts  
 Cooperation  
 Participation  
 Ideal, purpose  
 Share in  
 Assure your future investment  
 Give  
 Conviction  
 You  
 You  
 Professional educator  
 Fun or thrill of learning  
 Teaching tools  
 Learning tools  
 Educational plant  
 In the public interest  
 Pause and praise  
 Ask

### Mind Closing Words

Support  
  
 Aid  
  
 Better  
 Rights  
 Freedom  
 Tolerance  
 Statistics  
 Help  
 Assistance  
 Objective  
 Donate  
 Taxes  
 Get  
 Thinking  
 I  
 We  
 Teacher  
 Study  
 Equipment  
 Supplies  
 School house  
 Public relations  
  
 Tell

## Development is Different From Fund Raising

### Development Basic Approach/Concepts

Commitment of chief administrator and board to the development program  
Complete integrity  
Principal concern is top quality education  
Good business management procedures are absolute necessity  
Long range planning  
Public relations are prerequisite  
Invites substantial investments  
Goals and objectives clearly written  
Negotiate from position of strength  
A positive attitude is paramount and permanent  
Publics must be involved with the institution on a continuing basis

### Programs and Projects (activities)

Establishing endowment fund  
Estate planning programs  
Annuity programs  
Marketing research program  
Needs of people  
Life insurance benefits solicited  
Business and industry grants  
Research major prospects  
Involve affluent, influential people  
Encourage writing wills  
Scholarship programs  
Proposals to foundations  
Long-range planning  
Written, distinctive philosophy  
Policy, practice and procedure manuals

### Results (effects)

Large private donations received on a consistent annual basis  
Money programmed for five-to-ten years down the road  
Working from clearly projected 10-year plan  
Positive attitude developed  
Obstacles are seen as opportunities  
Annual reports of progress to all publics  
Supporters of program have strong interest in programs  
Function charts developed  
Life insurance policies/dividends received  
Foundation grants  
Private dollars generated  
Insurance dollars attracted

### Fund Raising Basic Approach/Concepts

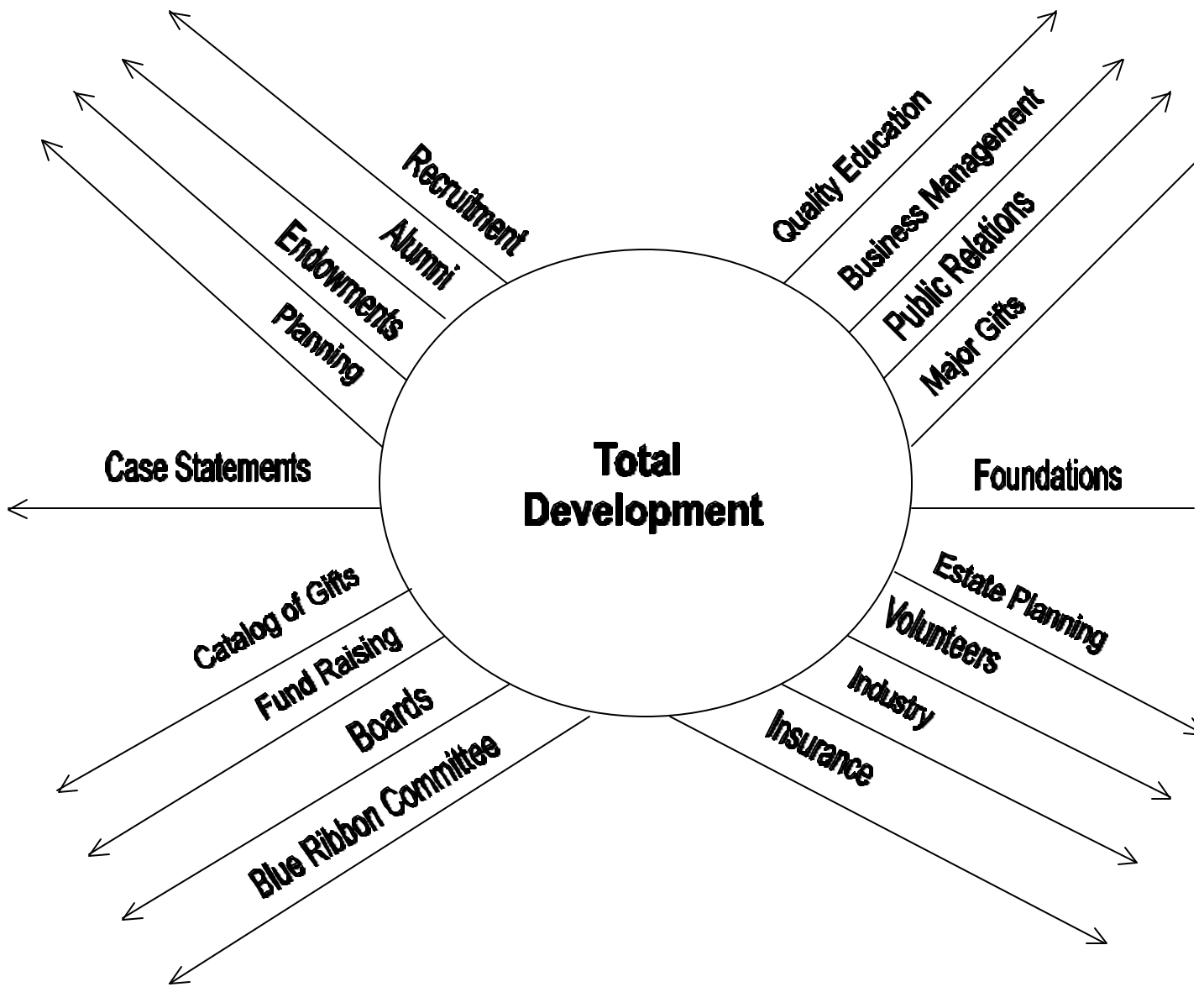
Panic reactions to negative deficits start process of fund raising  
Crisis orientation  
Project orientation; year-to-year  
Temporary solutions  
Limited objectives – short range  
Shaky, unreliable, insecure  
Immediate solution demanded  
Amateur approach; stopgap measures  
No planned continuing efforts: hit and miss; no long-range plan  
Band-aid approach  
Negotiate from position of weakness  
“help”, “need”, “poor”, “assist”  
Reply on gimmicks

### Programs and Projects (activities)

Bingo: a major form of financial support  
Car wash  
Annual bazaar  
Thanksgiving raffle  
\$10-a-plate dinner  
Cadillac ball  
Sales program and advertising  
Magazine sales  
Candy drives  
Festivals  
Annual book fair  
Bash  
Slave auction  
Las Vegas Night  
Mardi Gras

### Results (effects)

Recurring financial crisis  
Confused job specs  
Job descriptions out-of-date  
Working one year at a time  
Raising money on crisis orientation  
No clear cut goals or objectives  
High staff turnover  
Vague financial reporting  
No records of past progress or reason for change  
Changes made for change sake  
Vague organization chart  
Do nothing to educate public about values of education nor their role in supporting education  
Fails to get people involved in programs



## LOG OF DEVELOPMENT ACTIVITIES

School \_\_\_\_\_

City, State \_\_\_\_\_

Development Facet \_\_\_\_\_

**Proposed Goal**

\_\_\_\_\_

**Action Strategies**

1. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Resources Needed**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**Update Comments**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Reasons for Achievement**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

<b>Part III      Curriculum</b>
---------------------------------

**Diocesan Curriculum Goal**      **Between self-studies each school will revise all areas of the curriculum based on diocesan guidelines in the light of its student’s needs.**

The diocesan goal is, in this case, an expression of the requirements of the NCA/WCEA accreditation process, rather than an additional expectation.

A.      Ongoing Curriculum Revision

	2003	2004	2005	2006	2007
<b>Diocesan Guides</b>	Science	Physical Health Social Studies	Technology Language Arts Fine Arts	Religion Preschool/ Pre-K Kindergarten	Math Critical Thinking Skills

**Local  
Curriculum  
Evaluation**

<b>New Textbook Adoption (Copy/Date)</b>	
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**Directions – An updated copy of this form is to be submitted to the Catholic Schools Office**

## Part IV Finance

**Diocesan Finance Goal – The school will provide the necessary operating revenue while keeping it affordable for parents who desire a Catholic school education for their children.**

### Suggested Budget Guidelines

Budgeting is a process that is best described, as our best guess at what next year's operations will cost. Over time the process becomes much more refined as we monitor and evaluate the income and expenditures of each year. Being aware of the economic environment as it changes and the cost of things as they may fluctuate helps us to plan and prepare our budget. An approved Diocesan chart of accounts is attached for your assistance in setting up your budget.

- A. General Expenditures (this area is sometimes the hardest to get a handle on; it is acceptable to be a little generous when planning)

Suggested percentage increase for the following costs:

Utilities – 4 to 6%

Materials – 2 to 4 %

- B. Salaries and Benefits (Principals, Teachers, Administrators and Staff)

The Diocese publishes compensation schedules for these, with ranges and steps that are to be followed.

The Human Resource and Finance offices of the Diocese provide the cost projects for benefits and other insurance programs in January of each calendar year to assist in the budgeting process.

- C. Capital Expenditures.

Accounting for the depreciation of the existing buildings and equipment and funding the depreciation expense will help provide for resources in the future to fund the replacement, repair or new building/acquisition as the school grows. This should start slowly and be allowed to grow consistently until it reaches acceptable accounting standards. Check with the Diocesan Finance Office for assistance in setting this process up.

- D. Technology

Refer to the local school technology plan. Money for maintenance, support and technology upgrades should be budgeted.

- E. Continuing Education Aid

The budget should include an expense item for continued education, whether via workshops provided by the Diocese or educational opportunities from institutions of higher education or public school districts.

## F. Revenue

- 1) Tuition should be based on the cost to educate or operational costs of the school.
- 2) A small increase every year is necessary to avoid a large increase in a year which will negatively impact enrollment.
- 3) Scholarship/tuition assistance will always be a part of the actual revenue stream for a school. Basing the tuition costs on actual costs to operate will allow more families to qualify for subsidy to outside as well as internal assistance organizations, i.e. CCF, CTODP, ASCT.
- 4) Development. Be realistic in setting goals for this part of your revenue. Base your budget on your history of success with an incentive to improve the participation from the community, including students, parents, parish and larger neighborhood. Assess the impact of new programs on existing programs and be careful not to over tax your constituency to the point that it will negatively impact your performance.
- 5) Tuition Billing and Collection Companies. There are a number of organizations that provide this service. It is recommended that each site investigate the benefits of working with one of these services. The cost can be built into the tuition base and, if the structure is put in place and followed, history has shown that revenues are stabilized and increased.

# Elementary School Compensation Planning Form

Current Year \_\_\_\_\_ School \_\_\_\_\_

Grade Level	Total Enrollment	Number of Full-Time Classroom Teachers	Full-Time Teachers Total Salaries	Average Salary (D/C)	Year _____	Year _____	Year _____	Year _____	Year _____
K	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
1	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
2	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
3	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
4	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
5	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
6	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
7	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
8	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Counselor _____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Music/Art _____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
P E _____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Computers _____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Library _____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Principal _____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Asst Principal _____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Other _____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Totals	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

## Employee Benefits Paid by Employer (these estimates should be based on totals from above)

Health Insurance _____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Retirement _____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Short Term Disability _____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
SS/FICA _____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Total Benefits _____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Total Salary + Benefits _____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

# High School Compensation Planning Form

Current Year \_\_\_\_\_ School \_\_\_\_\_

List Positions By Subject Area	Total Enrollment	Number of Full-Time Classroom Teachers	Full-Time Teachers Total Salaries	Average Salary (D/C)	Year ____	Year ____	Year ____	Year ____	Year ____
_____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Sp Areas	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Media Spec	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Principal	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Assist Principal	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Athletic Director	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Campus Minister	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Other	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Totals	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

**Employee Benefits Paid by Employer (These estimates should be based on totals from above)**

Health Insurance	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Retirement	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Short Term Disability	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
SS/FICA	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Total Benefits	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Total Salary + Benefits	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

## **Part V      Facilities Maintenance**

### Create and Organize Maintenance Data File

- A.      Building History
  - 1.      History of past repairs, alterations or restorations
  - 2.      History of building from time it was built to present (include data building was built, who designed it and who constructed it).

Include:

  - Original building plans (blueprints, old and new)
  - Construction drawing remodel or major repairs
  - As-built drawings as generated at the time of construction

- B.      Photograph History of Buildings
  - 1.      Photograph building details, concerns, interior and exterior elevation
  - 2.      Note a description of photo on the back of each photograph with date
- C.      Present Structural Changes or Repairs needed (change, estimated cost, anticipated year of change or repair.
- D.      Receipt File
- E.      File of Contractors that could be called for maintenance repairs
- F.      Product Literature, Warranties, Guarantees, Manuals on equipment, materials and supplies
- G.      Review all Programs for Safety (fire, earthquake, flood, etc.) and Health (first aid, candle watts, cafeteria, lavatories, etc.)
- H.      Insurance and Risk Management coverage and limits

## Preventive Maintenance Daily Check List

Week \_\_\_\_\_  
(Initial if acceptable or comment on recommended corrective measures to be taken)

* Maintenance Item	M	T	W	Th	F	S	S	Comments
* Check exit lights								
* Check all outside lights								
Sweep/Mop								
Vacuum carpets								
Dust/clean								
Check all emergency exit lights								
Check all emergency exits are clear								
Pick up trash/adequate trash receptacles								
Clean up around dumpster								
* Check security systems and alarms								
Check all stoves, hood filters and cooking areas to insure they are properly cleaned to remove grease and inflammable waste								
Check all "portable heating units" to insure they are not a tripping hazard and don't overload a circuit								
Wet or (snowy) days – clean up water around entrances and stoops before and after events								
Hot/Cold weather precautions – if evaporative cooler, a/c or heat is on, check to see it is still on. Check that fans are circulating air								
* Items to be checked first.								



## Preventive Maintenance Monthly Check List

Month \_\_\_\_\_ Year \_\_\_\_\_  
(Initial if acceptable or comment on recommended corrective measures)

* Maintenance Item	Comments
* Trip hazards, loose flooring, free of holes, surface is even, walkways, concrete, pavement, flooring, carpet, tile, linoleum	
* Check caulking on windows	
* Check all window frames and glass for cracks	
* Check handrails	
* Check hardware on all doors – screws, adequate hardware	
Check all trees for dead branches	
Trim shrubs	
Check and clean outside drains	
Check all painted surfaces to see if scraping and painting are needed	
Check all fences and gates	
Water treatment filters/pads	
Check all pumps	
Check all storage areas to insure they are clean, shelves are not overloaded and heavy objects are stored on lower shelves	
Wet or (snowy) days – clean up water around entrances and stoops before and after events	
Hot/Cold weather precautions – if evaporative cooler, a/c or heat is on, check to see it is still on. Check that fans are circulating air	
* Items to be checked after a disaster	







**Preventive Maintenance  
Long Term Check List**

Year \_\_\_\_\_

* Maintenance Items		Year	
Item	Years	Checked	Comments
Water heater tank drain	2 - 3		
Building insulation	3 - 5		
Paint interiors	2 - 3		
Paint exteriors	2 - 5		
Ceramic tile grout	4 - 5		
* Sound system	5 - 10		
* Slurry seal pavement and stripping	6 - 10		
* Check generators	6		
* Check batteries	2 - 3		
* Check automatic start-up equipment			
* Electrical			
* Concrete			
* Masonry			
* Trusses			
* Structural steel			
* Lath and plaster			
* Glass and glazing			
* Check valves			
* Check ceiling material			
Asbestos			
* Items to be checked after a disaster			



## Part VI

## Personnel Development and Retention

**Diocesan School Personnel Goal:** Each school will develop a plan that will provide staff members opportunity to become stronger professionals and promote staff retention.

1. List current methods of allowing staff to seek professional development (i.e., professional days, money in budget for seminars, workshops).
2. List 3 ways professional opportunities are made available to staff members (newsletter, bulletin board, etc.)
3. How do staff members share their professional development with colleagues?
4. How does the administration encourage professional development in staff members (i.e., goal setting, future leadership planning)
5. List ways that new staff members receiving mentoring by experienced staff members
6. How is ministry certification encouraged/monitored in professional development?

Teacher Professional Growth Process forms are available at <http://www.diocesephoenix/Educ/School Office/Files/Personnel Forms/Prs frm 13.doc>



## Part VII

## Technology

**Diocesan Technology Goal**    **Each school will develop a plan that will be reviewed and updated on an annual basis.**

### Phase I

Each school will develop a plan to incorporate technological tools such as hardware, software and training to facilitate administrative and instructional services, thereby improving student achievement and the ability of Catholic school students to compete in the international work place.

### Phase II

Each school will extend technological tools such as, hardware, software and training materials to all classrooms. Upgrade, as needed, existing hardware and software in the Phase I departments. Provides the necessary support in personnel and training, in order to facilitate administrative and instructional services, thereby improving student achievement and the ability of the students to compete in the international work place.

### Phase III

Each school will upgrade existing hardware and software. Provide the necessary support in personnel and instructional services.

The complete Technology Plan is available on the Diocese of Phoenix website. See <http://www.diocesephoenix.org/catholicschools>

## Part VII

## Student Life

### **Diocesan School Student Life Goal**

**The school should provide opportunities for students in the areas of spiritual development, personal/social development, as well as physical development so as to address the needs of the whole child.**

Areas of student life to be addressed:

- A. Spiritual Development. The practice of our faith should be present in all aspects of the student's life. This should be done through prayer as well as the example of Christ in all activities.
- B. Academic Development. Includes students acquiring the attitudes, the knowledge, and the skills that will aid their learning in school and through their lifetime; to be prepared academically to carry on their learning to higher institutions; and to realize their education has a direct relationship to their place in the workforce, in their communities and at home.
- C. Career Development. Includes the students ability to make informed career decisions for the individual needs of that student; to develop a strategy to ensure future satisfaction and job success; to understand that personal strengths, education, and training are essential in the workplace.
- D. Personal/Social Development. Requires that a student understand and gain the knowledge to show respect for others as well as self; to learn decision-making and goal setting skills; and to understand the need for safety and survival skills in today's society.
- E. Physical Development. Instill in the student the ability to learn how to succeed, as well as how to handle defeat through the value of competition, while developing the strength of mind, spirit, and body.
- F. Artistic Development. Includes the student's ability to explore and experience the fine arts through programs such as music, speech, drama, and other culturally rich avenues.
- G. Emotional Development. It should be the goal of the faculty and staff to instill, encourage and nurture a healthy self-esteem within the student body using all resources available.



## Perception Check of Student Life

1. How is student leadership fostered at the school?
2. Comment on student participation in each of the areas listed on the previous page.
3. How are students invited/encouraged to be involved?
4. How are budget priorities given to these areas?
5. Reflecting on the school's mission and the information above, what areas need to be further addressed or added to improve student life at the school?

## Part XI

## Safety

### **Diocesan School Safety Goal**

**The school should use all resources available to them, including staff, procedures and education to provide a safe, secure environment for all students.**

Schools should review their present crisis/safety plan to ensure that the following items are covered:

- I. Crisis Prevention Policy
- II. Crisis Mission Statement
- III. Crisis Team Assignment and Responsibilities
- IV. Crisis Check List
- V. Prevention
- VI. Intervention
- VII. Specific Procedures
- VIII. Post-critical Incident/Evaluation