

ADDENDUM HB: FOUR STAGE PROCESS FOR A FORMAL STUDY OF THE PARISH ELEMENTARY SCHOOL(S)

PART 1: PURPOSE

"Yes, I know what plans I have in mind for you, Yahweh declares, plans for peace, not for disaster, to give you a future and a hope. When you call to me and come and pray to me, I shall listen to you. When you search for me, you will find me, when you search wholeheartedly for me, you will find me Yahweh declares. I shall restore your fortunes and gather you from all the nations and wherever I have driven you, Yahweh declares. I shall bring you back to the place from which I exiled you." (Jeremiah 29:11-14)

PURPOSE OF A FORMAL STUDY OF PARISH ELEMENTARY SCHOOLS

The purpose of a formal study of the elementary school(s) of a parish or groups of parishes is to reflect prayerfully on and strengthen the commitment of the parishioners to provide for the religious education of the Catholic children and to ensure that every child has access to a quality Catholic elementary school. (as described in the Standards for Quality Catholic Elementary Schools, Appendix G)

The study should result in a recommendation to the Regional Vicar, for presentation to the Archbishop, of the most desirable way for the parish(es) to provide access to quality Catholic elementary school(s) for all the elementary school age children of the parish(es) for the foreseeable future. The recommendation should be consistent with all appropriate Archdiocesan guidelines, the current cluster and parish pastoral plans and the characteristics of vital parishes regarding education.

The recommended option should result from broad consultation with the parishioners and school communities. Any options calling for a change in existing structure(s) such as build/expand, close, or form a regional parish school should include specific action steps, time lines, and identified responsibilities to ensure the most comfortable transition for students, their families, and school staff(s).

PREPARATION STAGE: ORGANIZING -Regional Vicar, Pastor(s) and Principal(s)

PURPOSE

- To establish a prayerful environment.
- To recognize the circumstance that prompted this initiative (parish/cluster plan(s), regular annual review of parish plan(s), experience of school(s), etc.)
- To identify the benefits and concerns about doing this study
- To consider the appropriateness of the timing of the study
- To review the study process itself
- To recognize the tasks to be done and time required to do them
- To determine the need for a facilitator and other staff support
- To consider the timetable for the study and modify as needed
- To identify where meetings will be held
- To construct and agree on a planning budget (facilitator, meals, materials, postage, supplies)
- Clarify roles and responsibilities of the members of the committees as distinct from their functions in the school/parish organization
- To begin to determine what background material is needed and available
- To identify any specific issues that the Regional Vicar feels need to be addressed.

THE REGIONAL VICAR, PASTOR(S), AND PRINCIPAL(S) NEED TO ANSWER THE FOLLOWING:

- How will this study enhance Catholic elementary education and ensure future access to Catholic elementary schools by the children in the study area?
- Is the timing right to begin the study?
- What will the benefits be of doing this study?
- What concerns do we have about doing this study?
- How will we proceed?

1. How does the need for a study become recognized?

There are several ways that the need for a study of the parish school(s) is recognized:

- In the parish pastoral planning process or cluster pastoral planning process,
- In the annual review of the parish plan,
- As a result of the regular review of the Standards for Quality Catholic Elementary Schools,
- In the normal activity of scanning the environment (school enrollment, parish registration, neighborhood demographics, etc.)
- In response to an inquiry or information offered by the Regional Vicar, Office for Catholic Education or others.

2. What is the process to obtain approval to begin a study?

The pastor(s) write(s) to the Regional Vicar and request(s) permission of the Archbishop to begin a formal study of the parish elementary schools identified to determine possible options for the future.

3. Who needs to be involved in the decision to request approval to conduct a study of the school?

Each pastor consults the parishioners in his parish either directly or through the following persons or groups:

- | | |
|-----------------------------|---------------------------------|
| a) Parish Pastoral Council, | b) Parish Finance Council, |
| c) School principal, | d) Home and School Association. |

4. What happens after approval has been granted for the study?

COMMUNICATION

-The pastor(s) send(s) a letter to the Secretary for Catholic Education, the Major Superior(s), if applicable, and the Pastors' Committee of the Personal Parishes, if applicable, to inform them that a study is being initiated and to invite the religious communities to participate in the study.

-The pastor(s) inform(s) the parish and school communities that a study will be conducted, the expected time schedule and consultative role that parishioners and school parents will have.

FORMATION OF THE STEERING COMMITTEE

-In instances where there are several parishes involved, the Regional Vicar forms a **Steering Committee** consisting of the Pastor and Principal from each parish and school involved in the study, and one lay representative from each **School Study Committee**. When only one parish is involved, the school study committee of the parish, chaired by the Pastor, takes the actions of the School Study Committee and the Steering Committee described below.

FORMATION OF A SCHOOL STUDY COMMITTEE IN THE PARISH

-The pastor(s) forms a school study committee consisting of the principal and representatives of the parish pastoral council, finance council, Home and School Association, and any other appropriate parish committees.

PREPARATION OF THE COMMITTEE(S)

All committee members need to become familiar with the documents guiding the process, the *Standards for Quality Catholic Elementary Schools within the Archdiocese of Philadelphia* (Appendix G of the Parish Elementary School Policies and Procedures 2000) and *Guidelines for the Process to Consider Alternative Structures for the Parish Elementary School* (Appendix H of the Parish Elementary School Policies and Procedures 2000 with addenda), reflect on their training and experience in planning, consider if additional preparation is needed and, if so, arrange for it.

THE STUDY PROCESS

The study process described here involves **four stages: 1. information gathering, 2. identifying options, 3. testing the options, and 4. identifying the major findings and recommendations**. The School Study Committee(s) and the Steering Committee share the work by doing the part of the process that each is best suited to do.

STAGE 1: INFORMATION GATHERING AND EXPLORING

PURPOSE OF THE SCHOOL STUDY COMMITTEE IN THE PARISH

- To establish a prayerful environment.
- To reaffirm and understand the Parish Mission Statement(s) and the responsibility of the baptized Catholics to provide for the religious education of Catholic children, the characteristics of vital parishes regarding education and the Standards for Quality Catholic Elementary Schools Within the Archdiocese of Philadelphia (Appendix G).
- To review the most recent parish and cluster pastoral plans, and the most current demographic information for the area being studied
- To review and analyze school information in light of the Standards for Quality Catholic Elementary Schools Within the Archdiocese of Philadelphia
- To obtain additional information as needed.
- To identify the internal strengths and limitations of the parish school(s).
- To identify the external opportunities and threats that exist for the school(s).
- To identify valid assumptions about the future of the Catholic elementary school in the study.

THE SCHOOL STUDY COMMITTEE IN THE PARISH:

- Reviews the findings of the most recent parish and cluster pastoral plans, the most current demographic information for the area being studied
- Assesses the parish school in light of the Standards for Quality Catholic Elementary schools Within the Archdiocese of Philadelphia(Appendix G)
- Analyzes enrollment history (Addendum HA) and develops enrollment projections for the school
- Conducts building assessments for existing school buildings
- Obtains additional information as needed.
- Identifies the internal strengths and limitations of the parish school.
- Identifies the external opportunities and threats that exist for the school.

Expected outcome: *Based on our study, the specific issues that proposed options for Catholic elementary school(s) must address are....*

Communication Requirements

- School Study Committees provide the Steering committee with the report of the assessment of the school against the standards, enrollment projections, building assessments, and their analysis of the **C**hallenges, **L**imitations, **O**pportunities and **S**trengths (CLOS analysis). All parishioners and school communities receive a summary communique of the findings.

STAGE 1: INFORMATION GATHERING AND EXPLORING *(continued)*

PURPOSE OF THE STEERING COMMITTEE

- To establish a prayerful environment.
- To review the findings of the most recent parish and cluster pastoral plans, the most current demographic information for the area being studied
- To review and analyze school information available from the Office for Catholic Education.
To review the reports of the School Study Committees
- To obtain additional information as needed.
- To identify the internal strengths and limitations for Catholic elementary education in the area.
- To identify the external opportunities and threats that exist for Catholic elementary education in the area.
- To identify valid assumptions about the future of the Catholic elementary schools in the study.
- To assist the Regional Vicar to identify specific issues that the Catholic schools need to address in the next five years.

THE STEERING COMMITTEE:

- Gathers the reports of the School Study Committees, other information about the schools in the study and additional information as needed.
- Performs an analysis of the **C**hallenges, **L**imitations, **O**pportunities and **S**trengths (CLOS analysis) for Catholic elementary education in the area
- Makes assumptions about the future needs for Catholic elementary education in the area.
- Recognizes the specific issues, identified by the Regional Vicar, that the Catholic elementary schools need to address in the next five years.

Expected outcome: *Based on reports from the school study committees the Steering Committee assumptions and those of the Regional Vicar, the specific issues that the proposed options for Catholic elementary school(s) must address are....*

Communication Requirements

- The Steering Committee provides each School Study Committee with their assumptions about study area, any specific issues that the formal study must address, and the results of their analysis for all the information that was sent to the Steering committee by the school study committees.
- Each School Study Committee keeps the Parish Pastoral Council, the parishioners and the school community informed about the information, assumptions and issues which must be addressed that have been recognized by the Steering Committee.

STAGE 2: IDENTIFYING OPTIONS

PURPOSE OF THE SCHOOL STUDY COMMITTEE IN THE PARISH

- To understand the specific issues that the study needs to address identified by the Steering committee and to accept responsibility for helping to develop options that address them.
- To begin to develop a list of options to ensure access to quality Catholic elementary schools for all parish children

THE SCHOOL STUDY COMMITTEE:

- Receives the assumptions about the study area, any specific issues that the formal study must address, and the results of the analysis of all the information from the Steering committee.
- Develops a list of options to ensure access to quality Catholic elementary schools for all parish children and forwards them to the steering committee.
- Keeps the parishioners and the school community informed about the information, assumptions and issues that must be addressed that have been recognized in the Steering Committee

PURPOSE OF THE STEERING COMMITTEE

- To reaffirm and understand the Parish Mission Statement(s) and the responsibility of the baptized Catholics to provide for the religious education of Catholic children, the characteristics of vital parishes regarding education and the Standards for Quality Catholic Elementary Schools Within the Archdiocese of Philadelphia (Appendix G).
- To understand the specific issues identified by the Regional Vicar that the formal study of the parish(es) elementary school(s) should address and to accept responsibility for developing options that will address them.
- To review feedback from the Parish Pastoral Council(s) and the School Study Committee(s) from Stage 1.
- To identify and prioritize the goals for the formal study of the school(s).
- To develop options to provide access to quality Catholic elementary schools for the children of the parish(es) for the foreseeable future.

THE STEERING COMMITTEE:

- Understands and accepts the Parish Mission Statements, Standards for Quality Catholic Elementary Schools (Appendix G) and the Characteristics of Vital Parishes regarding education.
- Understands the specific issues that the study should address identified by the Regional Vicar and accepts responsibility for developing options that address them.
- Reviews feedback from Parish Pastoral Council(s) and School Study Committee(s) on Stage 1.
- Identifies and prioritizes the goals for the study.
- Informs the School Study Committees of the goals for the study, unique situations the plan should address, and options being developed to accomplish the goals.
- Reviews the lists of options to ensure access to quality Catholic elementary schools for all parish children being developed in the school study committees.

STAGE 3: CREATING A FIRM LIST OF OPTIONS AND TESTING THE OPTIONS

PURPOSE OF THE STEERING COMMITTEE

- To consider the goals of the study and options for accomplishing the goals in light of the responses from the School Study Committees.
- To identify criteria which must be met by any option we propose to ensure access to quality Catholic elementary schools for all parish children.
- To test the proposed options against the criteria.
- To revise or eliminate options that do not meet the criteria.
- To share the list of options that meet the Steering Committee's criteria with the School Study Committees, the parishioners and school communities. This list would include an explanation of what each option could mean to each parish (e.g. preparation and reception of the sacraments, anticipated tuition, academic programs, subsidy expected from the parish).

THE STEERING COMMITTEE:

- Considers the responses of the School Study Committees to the developing options and revises them as needed.
- Develops criteria for testing if the options being developed will ensure access to quality Catholic elementary schools for all parish children for the foreseeable future
- Tests the options being developed against the criteria.
- Revises or eliminates options that do not meet the criteria.
- Identifies the options meeting the criteria and communicates these to the School Study Committees

Expected outcome: *We propose these options, that meet the criteria of the Steering Committee, to ensure access to quality Catholic elementary schools for all parish children for the foreseeable future...*

STAGE 3: CREATING A FIRM LIST OF OPTIONS AND TESTING THE OPTIONS
(Continued)

PURPOSE OF THE SCHOOL STUDY COMMITTEE IN THE PARISH

- To consult with the parishioners, school communities, faculty, Major Superiors, if applicable, and Pastors Committee for Personal Parishes, if applicable, regarding the options that have been proposed by the Steering Committee.

THE SCHOOL STUDY COMMITTEE:

- Receives from the steering committee the list of options to ensure access to quality Catholic elementary schools for all parish children for the foreseeable future that have met the criteria established by the Steering committee
- Consults with principal(s) and faculty in a meeting about the options, identifying the perceived strengths and limitations of each option, answers questions when possible and records all questions to obtain answers.
- Consults with parents with children enrolled in the school through meeting(s) and/or survey identifying the preferred option given the individual circumstance of each parent, answers questions when possible and records all questions to obtain answers.
- Consults with parish parents of pre-school children through a survey or other means identifying their intention to enroll their children in Catholic school in the case of each option, answers questions when possible, and records all questions to obtain answers.
- Consults about the options with all interested parishioners through announcements in the Church bulletin and at Mass, soliciting written suggestions, and concerns and in parish meeting(s) or in other ways, answers questions when possible, and records all questions to obtain an answer
- Consults with the Major Superiors, if applicable
- Consults with Committee(s) of Pastors of Personal Parishes, if applicable
- Forwards the results of all the consultations to the Steering committee

Expected outcome: *We have consulted with the parishioners and the school communities and are submitting to the steering committee their reactions to the proposed options to ensure access to quality Catholic elementary schools for all parish children for the foreseeable future...*

STAGE 4: DEVELOPING THE MAJOR FINDINGS OF THE STUDY

PURPOSE OF THE STEERING COMMITTEE

- To receive and analyze the results of the consultations in each parish.
- To draft a written recommendation from the study in accordance with the Guidelines for the Process to Consider Alternative Structures for Parish Elementary School (Appendix H)
- To ensure that the recommended option addresses issues that Regional Vicar identified
- To share the draft report of major findings with School Study Committees to solicit their responses and suggestions.
- To revise the draft report of major findings as needed, including specific actions, responsibilities and time line, and submit the final report and recommendation to the Regional Vicar who will present it to the Archbishop.
- To communicate, celebrate, and implement the recommendation if it is accepted.

THE STEERING COMMITTEE:

- Analyzes the results of the consultations and develops a draft report containing the recommended option
- Circulates the draft report to the School Study Committees
- Considers the responses of the School Study Committees to the draft report of major findings.
- Develops a final written report of major findings that includes:
 1. identification of how religious education of the children will be provided
 2. the reports of the School Study Committee(s) including the results of the assessment of the current or prospective parish school(s) in light of the Standards for Quality Catholic Elementary schools
 3. the **external opportunities and challenges** supported by appropriate data as identified by the steering committee
 4. **assumptions** of the steering committee about future conditions.
 5. the **internal strengths and limitations** supported by appropriate data identified by the steering committee
 6. **issues** identified by the Regional Vicar that **the recommended option must address.**
 7. **results of consultations** with parishioners, parents of school age and pre-school children, Major Superiors of Religious communities and Pastors' Committee(s) of Personal Parishes, as applicable
 8. the **recommended option** to ensure access to quality elementary Catholic education for all parish children for the foreseeable future and the specific **actions, including responsibilities and time lines**, required to implement the recommended option.
- Submits the final report containing the recommended option to the Regional Vicar to be conveyed to the Archbishop.

STAGE 4: DEVELOPING THE MAJOR FINDINGS OF THE STUDY *(continued)*

PURPOSE OF THE SCHOOL STUDY COMMITTEE IN THE PARISH

- To provide response and suggestions to the draft report of the Findings of the Study containing the recommended option provided by the Steering Committee
- To recognize the specific actions, responsibilities and time line that pertain to the school
- To provide for communication, celebration, and implementation of the recommended option if it is accepted.

THE SCHOOL STUDY COMMITTEE:

- Shares the draft of the Report of the Major Findings of the Study and solicits feedback from the parishioners and school communities and forwards any additional comment to the steering committee before final revisions are made.

Time line

The process is designed to be completed over a period of approximately 8 months. This could vary depending on how much work has already been done as a result of the normal ongoing monitoring and communication activities of the school and the parish.

Decisions to modify a school structure (closing or forming a regional parish school) are normally made in January preceding the September in which the decision is to take effect. The final report of the major Findings of a School Study containing a recommendation to modify a school structure would need to be submitted to the Archbishop not later than December preceding the September in which the decision is proposed to take effect.

Consequently, an ideal time to begin the school study process would be in the Spring when the most current data on the schools is well established. The request for permission to begin such a study could be prepared in the Fall prior to beginning the study.

Stage 1 and 2 could be completed before the usual summer break. The School Study Committee(s) are most active during this time gathering information, developing their reports of their studies and creating options for the future.

Stage 3 and 4 are best engaged in by the parish and school community during the period September to December, after the school year has begun and the teachers and students are settled into the school routine. The largest amount of work in these stages involve the consultation with the various parish and school communities and the development of the recommended option.

Stage 1 Information Gathering	3 months
Stage 2 Creating Options	1 month
Stage 3 Firm List of Options and Testing the Options	3 months
Stage 4 Identifying Major Findings and Recommendations	1 month

2 Years from Proposed Implementation				1 Year from Proposed Implementation					
Fall	Winter	Spring	Summer	Fall		Winter	Spring	Summer	Fall
Consultation and Request Permission to Conduct Study	Stage 1, Information Gathering	Stage 2 Creating Options	Stage 3 Consultation	Stage 4 Prepare Final Recommend.	Acceptance of Recommendation	Prepare to Implement decision to close or form parish region school	Implement Decision		
						Refer to appropriate implementation section in Appendix H.			

