

VILLA JOSEPH MARIE HIGH SCHOOL



1180 Holland Road • Holland, PA 18966 • www.vjmhs.org

BE STRONG
BE SMART
BE CREATIVE
BE YOURSELF



Villa Joseph Marie is a private Catholic college-preparatory high school for young women — the only one of its kind in Bucks County.

Villa Joseph Marie High School Strategic Plan



OUR MOTTO

“Always more, Always better, Always with love.”

OUR MISSION STATEMENT

Villa Joseph Marie High School is a Catholic college-preparatory school committed to helping young women discern who they are and grow into the disciples God calls them to be, as revealed by the life and teachings of Jesus Christ.

The legacy of our foundress, **Venerable Mother Maria Kaupas**, and the **Sisters of St. Casimir** inspire the dedicated faculty and staff to provide a challenging environment and nurturing community which celebrates the dignity and uniqueness of each student and empowers young women through faith, education, and service, doing so in the spirit of “Always more, Always better, Always with love.”

VILLA JOSEPH MARIE HIGH SCHOOL STRATEGIC PLAN

GOAL

Ensure long-term vitality of Villa Joseph Marie as the Legacy Asset of the Sisters of Saint Casimir

STRATEGIC VISION

Villa will provide the very best opportunities for educational, spiritual, athletic, artistic and personal growth for a robust and diverse student body.

THE PROCESS

Villa’s Strategic Planning Committee met numerous times throughout 2018–2019 to refine our school’s goals and plans for the future. The Strategic Planning Committee was divided into six subcommittees that focused on specific areas of interest for our school:

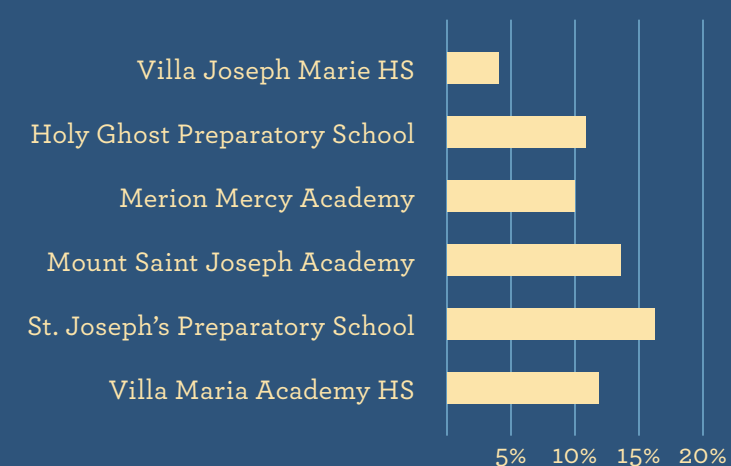
- (1) Development *SEE PAGES 2–5*
- (2) Education *SEE PAGES 6–9*
- (3) Enrollment *SEE PAGES 10–13*
- (4) Finance and Facilities *SEE PAGES 14–17*
- (5) Governance and Mission *SEE PAGES 18–21*
- (6) Marketing *SEE PAGES 22–25*

The six subcommittees presented the following goals, recommendations, and future plans, with supporting research and data, to Villa’s Board of Directors. The Board of Directors reviewed and ratified this plan in November 2019. Note: The strategic planning process is never truly complete, as the Villa Board of Directors and its subcommittees will continue to evaluate our school in order to provide the very best opportunities for our girls. In the words of Mother Maria, “Always more, Always better, Always with love.”

Listing of updates since ratification *SEE PAGES 26–27 Updated May 12, 2021*



In FY 2018, 3% of Villa Alumnae donated to the Annual Fund.
In FY 2020, 4% donated.
Average for area independent schools is 12%.



DEVELOPMENT COMMITTEE

GOAL 1

Increase Alumnae participation to 10% of total Alumnae in three years

- Interim Goals:
 - Year 1: Anticipated Success in Increase of 2%
 - Year 2: Increase of 2%
 - Year 3: Increase of 2%

STRATEGIES

- Reinvigorate system of Class Agents and communicate directly to them
- Further outreach to Alumnae through networking events, experiences, and social media
- Promote active engagement in order to stimulate further engagement (“I can do that.”)
- Build class giving by including Class Gift as part of Reunion and Yearbook Party communications
- Span communications beyond class years, taking advantage of relationships, sports teams, etc.
- Use Educational Improvement Tax Credit as vehicle to engage Alumnae in giving with very little out-of-pocket cost

BUDGETARY IMPLICATIONS

- Increased expenses as number of Alumnae networking and experiential events and marketing for those events increases / Goal of 10 networking events per year
- As growth of Alumnae participation increases, evaluation of staff composition is necessary

MEASURING PROGRESS

- Increase number of active Class Agents (75 Agents as of 4.28.2021)
- During the pandemic, when in-person Alumnae activities and events were suspended, the Alumnae Facebook Group was created. (578 members — 14% — registered as members as of 4.28.2021)
- Increase number of Alumnae donors to Annual Fund and MMK Scholarship (161 gifts in FY 2020)
- Increase total value of donations by Alumnae to Annual Fund (\$34,990 in FY 2020)
- Increase number of Alumnae giving consistently, year-to-year



DEVELOPMENT COMMITTEE

GOAL 2

Increase percentage of funded financial aid to 50% over three years

- EITC scholarship funding available

STRATEGIES

- Creation of a subcommittee within Development, led by an Alumna, parent, or past parent who is actively supporting financial aid funding and is educated on and dedicated to growing the number of supporters and total dollar value of support for financial aid
- In order to convey value of a Villa education, utilize video of Alumnae speaking on what they are doing now and how Villa brought them to this point
- Promotion and education
 - Small group gatherings with speaker, varying constituencies
 - Pitch at Alumnae, current parent, and past parent activities
 - Creation of social media campaign and materials for distribution

BUDGETARY IMPLICATIONS

- Increased expenses for production of video, creation of materials for distribution, and marketing campaign / Production of video, materials, and campaign would utilize current staff and students
- Increased expenses for one-on-one and small group meetings to secure financial aid funding
- Possible legal fees for creation and administration of named scholarships / Expenses would be limited as naming family assumes legal fees
- As volume and value of financial aid funding increases, evaluation of staff responsibilities and composition may be necessary

MEASURING PROGRESS

- Increase number of donors and total donations to financial aid funding (\$443,500 in FY 2021, including donations received through EITC and the Mother Maria Kaupas Scholarship)
- Increase number and value of need and merit-based scholarships available to students

GOAL COMPLETE

Since inception of Strategic Plan, there has been a 400% increase in number of donors and a 500% increase in funded financial aid.

- For 2021-2022, funded financial aid will have increased to 60% of need, including EITC funding, BLOCS grant, and private donations.



AMOUNT OF FUNDING

For FY 2018, Villa Joseph Marie awarded funded financial aid totaling less than \$25,000.

For FY 2019, those awards totaled \$50,000. Scholarship need, however, exceeded \$500,000.

The difference is assumed by the operating budget.

For FY 2020, Villa Joseph Marie's funded financial aid totalled \$348,750 (which included \$200,000 from the Sisters of St. Casimir and \$148,750 from EITC).

For FY 2021, Villa Joseph Marie's funded financial aid totalled \$443,500 (which included \$200,000 from the Sisters of St. Casimir and \$243,500 from EITC).



The education committee is developing an education platform for the 2020s that is experiential, self-generated, and progressive that empowers our Villa women to live out the Mission of Villa Joseph Marie. We will provide our educators with the institutional culture, people, process, and resources to rapidly evolve our platform on a formal and on-going basis.

EDUCATION COMMITTEE

GOAL 1

Initiate a cyclical process for curriculum review to foster a greater sense of collaboration among the academic disciplines and ensure our program prepares students for their next educational journey.

- Rationale:
 - To ensure graduates are prepared for post-secondary experiences and beyond in an ever changing world, create a universal tool for evaluating curriculum across the varying academic departments
 - Universal and consistent measures for curriculum development across the varied subjects

STRATEGIES

- Review best practices to ensure we are on the forefront of classroom engagement
- Research concentrations/themes to focus our review process – interdisciplinary in nature so all departments are able to participate
 - Concentrations will include, but not be limited to:
 - Adaptive, Experiential Learning
 - Beyond the Campus Learning
 - Curriculum Enhancement
 - Whole Person Education
 - Collaborative Learning
- Process for reviewing curriculum is in place. Early analysis has pointed us to be placing more of an emphasis on diversity and beyond the Campus learning opportunities for our students.
- Investigate opportunities to schedule more intentional time for collaboration among and between academic departments (foster interdisciplinary study)
- Investigate new scheduling options to enable more in-class instructional time to complement curricular reforms

BUDGETARY IMPLICATIONS

- Costs for Professional Development of Teachers in Best Practices
- Costs of Updated Curricular Materials and Resources



GOAL 1 CONTINUED... MEASURING PROGRESS

- Creation of Curriculum Review Metrics/Documentation
- Teacher observation by Administration and Department Chairs
- Tracking of curriculum throughout the year at department meetings for artifacts of alignment
- Student evaluation during the monitoring phase of the review process (Both qualitative and quantitative assessment data)

GOAL 2

Continue to develop and improve Villa's curriculum offerings in technology over the next three years, culminating with the creation of a stand-alone Technology department and coursework

- Rationale:
 - Implementing more technology coursework was a Middle States goal two years ago
 - Some progress has been made since that time — Freshman Seminar, extracurricular advances, etc.
 - Based on the Strategic Plan survey, perception is still showing this as an area to grow

STRATEGIES

- Continued integration of a technology component in the Freshman Seminar curriculum
- Investigation of ISTE Standards and research ways to implement these standards both within existing coursework and through creating a stand-alone Technology curriculum
- Publicize our advances in technological coursework as they occur
- Potential creation of a Technology department and creation of new coursework — coding, web design, etc.
- Investigate feasibility for making a technology course a graduation requirement
- Creation of student portfolio to hold artifacts of implementing technology
- Investigate partnerships with external organizations and businesses (Utilize potential alumnae connections)



GOAL 2 CONTINUED... BUDGETARY IMPLICATIONS

- Cost of physical improvements to instructional spaces
- Transportation costs for off-campus experiences
- Costs of professional development/new curriculum materials
- Hiring of additional staff for new coursework

MEASURING PROGRESS

- Portfolio of student work artifacts and assessment of students on technological standards
- Faculty survey data as to number of authentic learning experiences/ assignments given in classes taught
- Qualitative evidence of teaching through observations
- Survey data from alumnae as to how their Villa educational experiences compared to collegiate experiences





ENROLLMENT COMMITTEE

GOAL 1

Increase the number of engaged and educated Parent Ambassadors to 40 within the next two school years

- Why?
 - Effective/free advertising
 - Parent Satisfaction = Successful School
 - Unique stories attract a diverse student body

STRATEGIES

- How?
 - Invite all
 - Host trainings
 - Encourage peer recruitment
 - Create materials

BUDGETARY IMPLICATIONS

- If materials are printed in-house, this is a little to no cost strategy.
- If feasible, parent ambassadors could be given t-shirts or other promotional items at low cost.

MEASURABLE CRITERIA

- Parent representation at all recruiting events
- Parent panels at recruiting events
- In-home or off-campus events
- Working database of 40 parent ambassadors
- Printed reference materials for parent ambassadors containing school facts, branding, and current messaging



GOAL 2

Decrease the attrition rate of enrolled incoming freshmen from 10% to less than 8% during the one-year enrollment period

- Why?
 - Other scholarships awarded
 - Financial aid uncertainty
 - Failed scholarship negotiations
 - Refundable deposits for in-need families

STRATEGIES

- How to Prevent?
 - Timeline moved up from January to early December successfully in 2020-21 school year
 - Create comprehensive financial packages
 - Streamline scholarship evaluation
 - Increase understanding of budget constraints
 - Expand Big Sister/Little Sister Program

BUDGETARY IMPLICATIONS

- Necessitates careful collaboration between Finance Committee and Admissions Team
- Budget timelines move up
- Budget for awarded scholarships increased by up to 50%
- Enrollment security

MEASURABLE CRITERIA

- Admissions budget established by September for current 8th grade scholarships
- Early Candidates awarded comprehensive financial packages by September 15th
- Early Candidates submit non-refundable deposits
- Scholarship recipients awarded comprehensive financial packages by November 15
- Regular applicants awarded comprehensive financial packages by December 15th



GOAL 3

Increase the number of public school applicants/transfers by 20% in two years

- Why?
 - Parochial and private school enrollments are down
 - Increased competition among private schools in our market
 - Growing discontent in public middle schools
 - Untapped market

STRATEGIES

- How?
 - Outreach at community and athletic events
 - On-campus programs open to community (service, SAT prep, etc.)
 - Facilities for rent
 - Increase broad advertising

BUDGETARY IMPLICATIONS

- Renting out facilities could generate revenue
- Hosting community events — depending on the size and type — would come at a cost, but could create sponsorship opportunities
- Broad advertising in newspapers is expensive

MEASURABLE CRITERIA

- Overall increase of test takers
- Increased attendance at Summer Camps
- Increased attendance at Open Houses
- Increased applications from public school students
- Public school applications will fall in line with the typical admissions timeline





FINANCE AND FACILITIES COMMITTEE

GOAL 1

Achieve break even operations

- Surplus 2019-2020; Breakeven excluding debt service on target for year ending June 2021
- Breakeven including debt service in fiscal year 2021-2022

STRATEGIES

- Revenue
 - Achieve enrollment goals
 - Set appropriate tuition
 - Set and achieve annual fundraising goals
 - Increase funded financial aid
- Expense Management
 - Appropriate headcount
 - Benefit analysis
 - Business case for events/activities
 - Share information

BUDGETARY IMPLICATIONS

- No additional expenses required other than expansion of the Finance Committee

MEASURABLE CRITERIA

- Monthly budget updates with variance follow up
- Yearly five-year plan updates, done in conjunction with the budget
- Creation of budget and planning dashboard



GOAL 2

Complete a long-range campus development plan (including deferred maintenance) by FY 2021

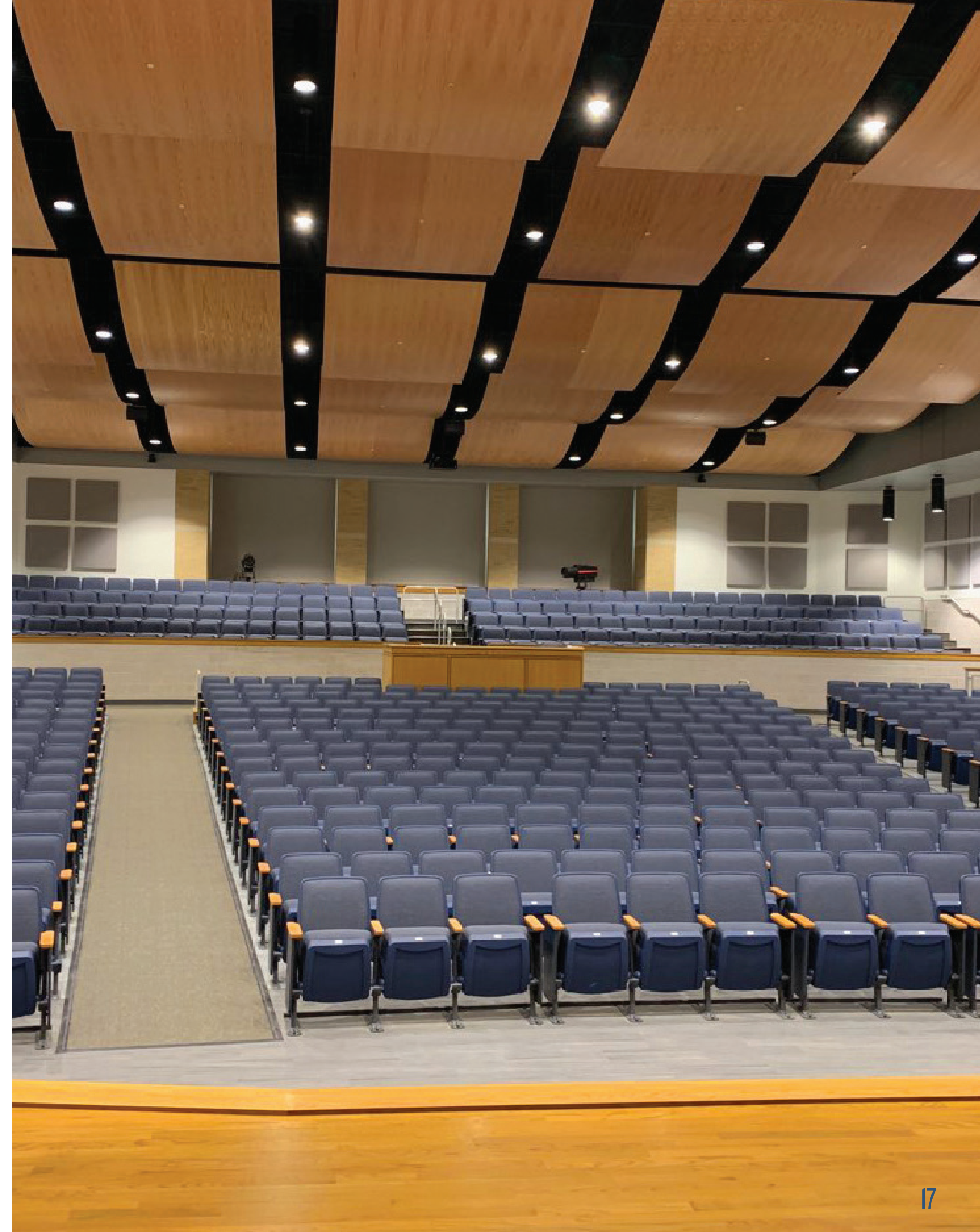
- Major repairs and improvements needed have been identified.
 - Projects are being approved based on availability of funding.
- Engineering firm hired to produce concept for long term campus plan

BUDGETARY IMPLICATIONS

- No additional expenses required

MEASURABLE GOALS

- Facilities Committee includes Facility manager, President, Controller and Head of Finance committee
- Present document to the Villa Board of Directors for approval
- Five-year financial plan (includes project costs) by FY 2022
- Annual budgets include detailed repair and maintenance plans





GOVERNANCE AND MISSION COMMITTEE

GOAL 1

Revise our current Mission Statement and establish practices that ensure the Mission and Catholic Identity of Villa are lived by all constituents

- Why?
 - Students understanding of the Mission
 - In-house Mission Committee
 - Supported by Middle States Data
 - Student and parent interest in Mission

GOAL COMPLETE

The new Mission Statement has been approved and communicated to all constituent groups. The new Mission Statement can be found on the inside cover of this Strategic Plan.

STRATEGIES

- How?
 - Mission statement edit timeline
 - Implementation
 - Feedback via survey
 - Catholic Identity (on-going with committee work)

BUDGETARY IMPLICATIONS

- This is a little to no cost strategy — some in-house printing and editing before any future publications.

MEASURABLE CRITERIA

- Re-write the Mission Statement and have this approved by February 2020
- Roll out our new Mission Statement for the 2020-2021 school year (Working with all groups will help ensure the sustainability of our new Mission Statement.)
- Make recommendation for how often the Mission Statement should be revised
- Evaluate constituents' understanding of the revised Mission and lived experience of Catholic Identity via a survey at the end of the 2020-2021 school year



GOAL 2

Embrace best practices that incorporate high performing Board standards and nonprofit compliance to ensure the stability and sustainability of Villa Joseph Marie's Board of Directors

- Why?
 - The Board is in the process of becoming a true managerial Board of Directors with fiduciary and mission responsibilities.
 - Board support and strategic direction are critical to ALL other objectives pursued by the school.

STRATEGIES

- How?
 - Samples of Board manuals, orientation processes, & evaluations were collected by this committee.
 - The committee collected the materials currently used by the Board for orientation, evaluations, nomination process, bylaws, and the manual.

BUDGETARY IMPLICATIONS

- In-house printing
- Software program purchase recommendation
- Salary cost relative to the outcome of the President's evaluation

MEASURABLE GOALS

- Create a clear and consistent process for Board nomination and sustainability by Fall 2020
- Create a clear orientation program for new Board members by Fall 2020
- Create an evaluation for the school President, Board member self-evaluation and a process to review the Board bylaws by Fall 2020
- Create a Board manual that will include all of these tools in one place by Fall 2020
- Evaluate the standards of nonprofit compliance by Spring 2021
- Follow-up with Board Chair and Vice Chair in the Spring 2021





TARGET AUDIENCES

- Girls (5th, 6th, 7th, & 8th graders)
- Parents of Prospective & Current Students
- Alumnae
- Benefactors

MARKETING COMMITTEE

GOAL 1

Expand specific areas of marketing to establish Villa as a premier Catholic high school that empowers women and prepares them for college

- In addition to standard print marketing, we will utilize social media and the school website to aid us in carrying out and tracking our progress.

STRATEGIES

- Define Villa Profile
- Create a Villa narrative
- Engage community
- Increased utilization of social media and digital marketing due to Covid
 - Has been the preferred alternative to three open houses: Spring 2020, Fall 2021, Spring 2021
- Tactics: “elevator speech,” key message Q&A, tag line, signage, event calendar, rental offerings, website content, social media, etc.

BUDGETARY IMPLICATIONS

- Coming up with the messaging is free. We need to strategically allocate funds across channels.
- Utilize our school website and social media whenever possible. It’s free!

MEASURING PROGRESS

- Increased website traffic
- Increased social media followers (likes, shares, etc. on Facebook, Instagram, Twitter, and LinkedIn)
- Record baseline metrics and assess (Twice a year: January 1, July 1)
- Note: Ongoing task. We need to continue to expand and stay current with fresh marketing ideas for the school.
- Note: Increased website hits and time spent on our site is slightly skewed for 2020, since people were forced into digital “events” without in-person options. Beginning with Fall 2021, re-assess numbers in comparison to 2019, not 2020.



GOAL 2

Provide strategic marketing support to the admissions team to increase applications and enrollment

STRATEGIES

- Competitive audit/research
- Printed materials
- Website
- TV commercials/radio
- Continually gathering information identifying where constituents find message
- Tactics: develop content, train ambassadors (ties in to admissions goal), etc.

BUDGETARY IMPLICATIONS

- Cost for marketing supporting admissions may increase, as the 2 departments split the cost of some of these materials
- Utilize our school website and social media whenever possible. It's free!

MEASURING PROGRESS

- Increased number of students applying to the school
- Increased number of students enrolling and attending the school
- In 2021, the 6th/7th Grade Practice Test realized highest registration in history.
- Achieved: Class sizes meet Villa's max capacity (begins over again the following year) — Ongoing task.



GOAL 3

Increase awareness of Villa's development and alumnae relations efforts to foster increased engagement

STRATEGIES

- Better inform people where their money is going (and that they can restrict it to a certain area)
- Methods for asking for support have been modified, ultimately maintaining participation while decreasing costs
 - Elimination of second Always Villa Fund letter
 - Addition of St. Casimir Week of Giving postcard
 - Digital marketing for May 2021 Phone-a-Thon
 - Tactics: TV commercials/radio, ambassador testimonials, social media, website content

BUDGETARY IMPLICATIONS

- Almost no cost associated with this, since the marketing is directly offset by the fundraising

MEASURING PROGRESS

- More dollars donated to Villa
- More alumnae participation (Alumnae Facebook Group initiated in October 2020; to date, 578 members — 14% of Alumnae)
- Achieved: 100% alumnae participation (unrealistic)
- Note: Ongoing task. It's never really possible to have too much money donated to Villa.

MARKETING THE STRATEGIC PLAN

- Announce Villa's strategic plan in 2020 and update it yearly.
- Show where the school is going — What does our future hold? (Not just for physical buildings, but for each committee's area)
- Tactics:
 - Reader/user-friendly presentation; Not just a 100-page word document
 - Utilize current relationships with news outlets
 - Create a content calendar for steady social media posts that tie in to the strategic plan
 - Make it available as a PDF for download, and include infographics and overview goals timeline

February 18, 2020

INSIDE COVER

The new Mission Statement was updated in accordance with the Governance and Mission Committee’s Goal 1 (page 19).

- Former Mission Statement: Founded and sponsored by the **Sisters of St. Casimir**, Villa Joseph Marie High School, a private Catholic collegepreparatory school for young women, defines itself by the special charism of its Foundress, **The Venerable Mother Maria Kaupas**, and by the life and teachings of Jesus Christ. Modeling Mother Maria’s belief in a life of faith, love, and service, the dedicated faculty encourages and celebrates the dignity, potential, and uniqueness of each student. A Villa graduate is a Christ-like woman committed to a life of faith and service, a lifelong learner, and an empowered global citizen.
- New Mission Statement: Villa Joseph Marie High School is a Catholic college-preparatory school committed to helping young women discern who they are and grow into the disciples God calls them to be, as revealed by the life and teachings of Jesus Christ. The legacy of our foundress, **Venerable Mother Maria Kaupas**, and the **Sisters of St. Casimir** inspire the dedicated faculty and staff to provide a challenging environment and nurturing community which celebrates the dignity and uniqueness of each student and empowers young women through faith, education, and service, doing so in the spirit of “Always more, Always better, Always with love.”

PAGE 19

Goal 1 for the Governance and Mission Committee was completed. The new Mission Statement has been approved and communicated to all constituent groups. The new Mission Statement, noted above, can be found on the inside cover of this Strategic Plan.

May 12, 2021

PAGE 2

Data in the highlighted box was updated to show progress as of FY 2020.

- In FY 2020, 4% of Villa Alumnae donated to the Annual Fund.

PAGE 3

Goal 1 for the Development Committee was updated, in addition to updating two strategies, adding one new strategy, and updating three points of measuring progress.

- Former Interim Goal: Year 1 Increase of 2%
- Updated Interim Goal: Anticipated success in Year 1 Increase of 2%
- Former Strategy: Reinvigorate system of Class Agents
- Updated Strategy: Reinvigorate system of Class Agents and communicate directly to them
- Former Strategy: Further outreach to Alumnae through networking events and experiences
- Updated Strategy: Further outreach to Alumnae through networking events, experiences, and social media

- New Strategy: Use Educational Improvement Tax Credit as vehicle to engage Alumnae in giving with very little out-of-pocket cost
- Former Measuring Progress: Increase number of active Class Agents (62 Agents as of 11.23.2019; 18 recognized as being active due to communication with Alumnae Relations)
- Updated Measuring Progress: Increase number of active Class Agents (75 Agents as of 4.28.2021)
- Former Measuring Progress: Increase number of Alumnae donors to Annual Fund and MMK Scholarship (148 gifts in FY 2019)
- Updated Measuring Progress: Increase number of Alumnae donors to Annual Fund and MMK Scholarship (161 gifts in FY 2020)
- Former Measuring Progress: Increase total value of donations by Alumnae to Annual Fund (\$32,135 in FY 2019)
- Updated Measuring Progress: Increase total value of donations by Alumnae to Annual Fund (\$34,990 in FY 2020)

PAGE 4

Goal 2 for the Development Committee was completed. Measuring progress was updated with current EITC totals. Since inception of Strategic Plan, there has been a 400% increase in number of donors and a 500% increase in funded financial aid.

- Former Measuring Progress: Increase number of donors and total donations to financial aid funding (\$54,000 in FY 2019, including donations received through EITC and the Mother Maria Kaupas Scholarship)
- Updated Measuring Progress: Increase number of donors and total donations to financial aid funding (\$443,500 in FY 2021, including donations received through EITC and the Mother Maria Kaupas Scholarship)

For 2021-2022, funded financial aid will have increased to 60% of need, including EITC funding, BLOCS grant, and private donations.

PAGE 5

The heading in the highlighted box was changed from “Amount of EITC Funding” to “Amount of Funding.” New data was also added to show progress.

- For FY 2020, Villa Joseph Marie’s funded financial aid totalled \$348,750 (which included \$200,000 from the Sisters of St. Casimir and \$148,750 from EITC).
- For FY 2021, Villa Joseph Marie’s funded financial aid totalled \$443,500 (which included \$200,000 from the Sisters of St. Casimir and \$243,500 from EITC).

PAGE 6

An introductory paragraph about the Education Committee was added.

- The education committee is developing an education platform for the 2020s that is experiential, self-generated, and progressive that empowers our Villa women to live out the Mission of Villa Joseph Marie. We will provide our educators with the institutional culture, people, process,

and resources to rapidly evolve our platform on a formal and on-going basis.

PAGE 7

One strategy under Goal 1 for the Education Committee was updated.

- Former Strategy: Establish three-year process for reviewing curriculum:
 - Year 1: Research/Planning for Changes
 - Year 2: Implementation of New Curriculum
 - Year 3: Monitoring of New Curriculum by Department Chairs/Administration
- Updated Strategy: Process for reviewing curriculum is in place. Early analysis has pointed us to be placing more of an emphasis on diversity and beyond the Campus learning opportunities for our students.

PAGE 12

Goal 2 for the Enrollment Committee was updated, in addition to updating one strategy and adding one strategy for this new goal.

- Former Goal: Decrease the attrition rate of enrolled incoming freshmen from 12% to less than 8% during the one-year enrollment period
- Updated Goal: Decrease the attrition rate of enrolled incoming freshmen from 10% to less than 8% during the one-year enrollment period
- Former Strategies:
 - Move up the timeline
 - Expand Big Sister/Little Sister Program (added bulletpoint)
- Updated and New Strategies:
 - Timeline moved up from January to early December successfully in 2020-21 school year
 - Expand Big Sister/Little Sister Program

PAGE 15

Goal 1 for the Finance and Facilities Committee was updated, in addition to updating one point of measurable criteria.

- Former Goal: Achieve break even operations
 - excluding debt service, by 2021-22
 - including debt service, by 2022-23
- Updated Goal:
 - Surplus 2019-2020; Breakeven excluding debt service on target for year ending June 2021
 - Breakeven including debt service in fiscal year 2021-2022
- Former point of Measureable Criteria: Quarterly five-year plan updates
- Updated point of Measureable Criteria: Yearly five-year plan updates, done in conjunction with the budget

PAGE 16

Goal 2 for the Finance and Facilities Committee was updated, in addition to updating one measurable goal.

- Former Goal: Complete a long-range campus development plan (including deferred maintenance) by FY 2021
 - excluding debt service, by 2021-22
 - including debt service, by 2022-23
- Updated Goal: Complete a long-range campus development plan (including deferred maintenance) by FY 2021
 - Major repairs and improvements needed have been identified.
 - Projects are being approved based on availability of funding.
 - Engineering firm hired to produce concept for long term campus plan
- Former Measureable Goal: Creation of Facilities Committee
- New Measureable Goal: Facilities Committee includes Facility manager, President, Controller and Head of Finance committee

PAGE 23

One additional strategy under Goal 1 for the Marketing Committee was added, in addition to adding one note of measuring progress.

- New Strategy: Increased utilization of social media and digital marketing due to Covid
 - Has been the preferred alternative to three open houses: Spring 2020, Fall 2021, Spring 2021
- New Measuring Progress Note: Increased website hits and time spent on our site is slightly skewed for 2020, since people were forced into digital “events” without in-person options. Beginning with Fall 2021, re-assess numbers in comparison to 2019, not 2020.

PAGE 24

One additional point of measuring progress under Goal 2 for the Marketing was added.

- New Measuring Progress: In 2021, the 6th/7th Grade Practice Test realized highest registration in history.

PAGE 25

One strategy and one point of measuring progress for Goal 3 for the Marketing Committee were updated.

- Former Strategy: Evaluate the “asks” for money – envelopes, letters Profiler magazine, website (in reference to Annual Fund and Capital Campaign)
- Updated Strategy: Methods for asking for support have been modified, ultimately maintaining participation while decreasing costs
 - Elimination of second Always Villa Fund letter
 - Addition of St. Casimir Week of Giving postcard
 - Digital marketing for May 2021 Phone-a-Thon
- Former Measuring Progress: More alumnae participation
- Updated Measuring Progress: More alumnae participation (Alumnae Facebook Group initiated in October 2020; to date, 578 members — 14% of Alumnae)



Always more, Always better, Always with love