NEWMAN CATHOLIC SCHOOLS
2025 Strategic Plan Update

Introduction

During the first half of 2023, Newman Catholic Schools (NCS) started the review process of its Strategic Plan. A comprehensive and lengthy process in 2018/19 resulted in the current strategic plan. While many of those strategies are still relevant and being implemented, there were multiple significant events that occurred since that plan was put into implementation. Among those events were the COVID-19 epidemic, a new President being hired and the achievement of being accredited. This process of updating the strategic priorities for NCS was born out of recognition of both a new(er) environment for NCS as well as honoring and using the efforts that were put forth by staff, leadership and NCS stakeholders in 2018/19.

To accomplish this, NCS used an appointed Parent Advisory committee in addition to its Leadership staff with facilitation by Tim McKeough of John Kelly and Associates. Work started in the fall of 2023 with the formation and facilitation of the Parent Advisory Committee. This committee created a set of updated strategic expectations that were

presented to the commission and handed over to the NCS Leadership in April of 2024. As a result of changing NCS leadership (3 new Principals), efforts were delayed until October of 2024. In October 2024, NCS leadership began to meet and by March of 2025 created the updated strategic plans reflected in this report.

Members of each committee include:

Parent Advisory Committee:

Mona Fox

Kati Goetsch

Jeff Gulan, NCS President

Laura Reamer

Tim McKeough, Facilitator/Consultant

Marcy Stenstrom

Rick Svennes

Jeanne Worden

NCS Strategic Steering/Leadership Committee:

Amy Faust	Site Director – Newman Catholic Early Child Care: St Therese
Caleb Feidt	Principal – Newman Catholic Elementary School: St Anne's
Pam Fochs	Principal – Newman Catholic Elementary School: St Mark's
Jeff Gulan	Newman Catholic Schools President
Sarah Keene	Newman Catholic Advancement Director
Jacci Lepak	Newman Catholic Schools Enrollment Spec., Marketing & Communications
Jim Lynch	Headmaster – Newman Classical School: Holy Name
Tim McKeough	Facilitator/Consultant
David Radtke	Newman Catholic Schools IT Coordinator
Waylon Resch	Principal – Newman Catholic Middle/High School
Sarah Welch	Site Director – Newman Catholic Early Child Care: St Michael

The subsequent strategic plan update has been thoughtfully created and evaluated by all committees and approved by the NCS Commission. All involved agree that the strategies laid out, best position Newman Catholic Schools to successfully fulfill its mission. This plan is a living document and will be reviewed periodically throughout its three-year cycle and updated on an annual basis or as deemed necessary.

NOTE: *For Timeline information not specified in month and year, we use the school-based fiscal year which reflects:*

Quarter 1 = July – September

Quarter 2 = October – December

Quarter 3 = January – March

Quarter 4 = April - June

Mission/Vision Statement:

MISSION: Newman Catholic Schools fosters disciples of Christ through Catholic faith, service, and academics.

VISION: Newman Catholic Schools will be the choice for a Catholic Education built on academic excellence, strong community, and a deepening relationship with Jesus Christ.

Core Values

Faith

Service

Academics

Responsibility

Respect

Integrity

Empathy

Gratitude

Strategies

During the 2024/25 Strategic Planning Sessions with the Parent Advisory Committee and then Steering Committee made up of Newman Catholic Schools Leadership, NCS agreed that to reach its goals in the next three years (2025 - 2028), the following update or the current strategic plan identifying 13 specific strategies will require the greatest focus, effort, and resources. For efficiency and clarity, these strategies were further identified into the following 5 strategic categories (Pillars) of System of Excellence, Financial Stability/Stewardship, Culture of Respect and Trust, Robust Marketing and Branding and Positive Parish Relations.

1. STRATEGIC CATEGORY: SYSTEM OF EXCELLENCE

1A: Goal – Define/Create a Student Success Profile (Faith, Service, Academics, & the Individual)

Rationale: NCS offers education from 4 years old through 12th grade. One of the opportunities NCS has as a small school system is to have a unique focus on each individual student as they progress through the system. In addition, a known challenge is the retention and sharing of information at different milestones (i.e. PreK to Elementary, 5th grade to Middle School and Middle School to High School). Those challenges can be compounded with a changing perception/landscape of higher education, accepting trade/technical schools as a more popular and/or viable option in addition to the more traditional 4-year college. All these factors lead to the desire to create a student success profile; unique to the student, grounded in our values of faith, service, and academics, assisting teachers, parents/guardians and counselors in ensuring our students success when transitioning through NCS and graduating out of the system into higher education.

Success/Metrics

Success will be measured first with discovery and implementation milestones, specifically:

1. July – October 2025: Research other school systems who are using a similar concept and documenting what we are currently doing. This information will be reviewed, and a Gap Analysis/Best Practice Document will be created for review.
2. January – May 2026: Create a Student Success Template with the appropriate inputs, outputs, and timing of each. Parallel to this template will be building a process that involves training, timing, data gathering, surveying stakeholders (student, teacher, guardian, etc.). NOTE: This

process needs to focus on our key transitions (PreK to K-5 / 5th to 6-8th / 8th to 9-12th)

3. September 2026: Implementation of Student Success Profile Template, tool and process. Feedback mechanisms will be established with data collection over Q1, Q2 and Q3 with review and incorporation of any changes in Q4. Changes then implemented in Q1 of the following year.

It is anticipated that it may take 2-3 cycles (years) before the template and process are finalized.

Success will be measured by

a. Each student having his/her individual success profile
b. Surveys upon student exit from the system will provide data to improve process and tool.
c. Engagement increases of relationships of teachers, students, and guardians as the tool serves both the system and the individual student as a both a tracking system and goal setting process to providing each student with his/her unique success story.

1B. Goal: Development of a Consistent Process of Reviewing Materials/Curriculum Used in Academics

Rationale: Curriculum is at the core of what is taught and the basis for instilling our values of faith, service, and academics. In addition, we need to align with outside entities (i.e. accreditation requirements, college admission requirements and state funding requirements). During leadership sessions, it was identified that there is a current curriculum review process in place with a standard 7-year cycle (see attachment). However, given its importance, the decision was to add it as a strategic goal to ensure that the process is reviewed and feedback gathered on a consistent basis to ensure it stays current and valid.

Success/Metrics

1. Review/Documentation of current system, identifying gaps in the current process (focus on future state). (May – July 2025)
2. Create a pilot program for each subject (rotating timeline)
    a. Programs to include accountabilities and communication
3. Implement program for each subject
4. Consistency around program with feedback, training, review, communication and implementation
    a. Q1 – Review and Gap Analysis
    b. Q2 – Next Subject
    c. Q3 & Q4 – Pilots

1C: GOAL: Define/Create a Professional Development Ecosystem to empower leaders, teachers, and staff to succeed, develop, and feel fulfilled.

Rationale: Staff that are engaged and challenged to grow will, in turn, be better adept at engaging and challenging students to do the same. In addition, in a competitive environment where employees can find alternate job opportunities, providing professional development to teams and individuals is paramount to

performance and retention of staff. Building an ecosystem of development for the organization and the individual creates

- Collaboration
- A safer environment to learn
- Personal and organizational metrics to measure increased performance quantitatively and through emotional intelligence.

Success/Metrics

Ecosystems can be difficult to measure as at its very core is cultural integration. However, we do think we'll be able to measure or create measures going forward to help us gauge success. Those measures will be:

- Staff/Student Retention (Decrease in turnover)
- Staff/Student Engagement
- Student Outcomes
- Scorecards (focusing on culture/values)

Defining the ecosystem will have the following steps:

i. Document Current: NCS currently offers professional development on both an organizational and personal level. These need to be documented and assessed for effectiveness
ii. Through review of best practices and surveying staff and students, a gap analysis will be created identifying the opportunities we have to create an effective ecosystem.
iii. Define both the organizational and individual components of the new ecosystem
iv. Communicate at both the system and individual level.
v. Create a calendar and implementation timeline

Staff engagement and development is successful when involves accountability and when the process is fluid and flexible to the changing needs of both the organization and the individual. Therefore, we anticipate a yearly cycle for the ecosystem of Q1 & Q2 being times of communication and implementation and Q3 & Q4 being times of feedback and adjustments.

Overall timeline anticipated is 2025/26 to develop the core ecosystem with implementation occurring in September 2026.

2. STRATEGIC CATEGORY: FINANCIAL STABILITY AND STEWARDSHIP

2A: GOAL: Define a Consistent Process of Communication and Transparency around reporting and sharing Financial Information

Rationale: NCS has gone through an extended period where financial stability was at question and at the top of mind of stakeholders. Over the past 5 years, measures have been implemented, placing NCS in a current stable financial position. However, through our committee meetings it became evident that the perception of financial stability is still negative by some stakeholders. Therefore, we felt it was an appropriate strategy to create a clear, consistent process of reporting and sharing financial information.

Success/Metrics

In combination with the Finance Committee, first steps will be to clearly document:

1. What information is being shared
2. Who it is being shared with
3. The format and the decisions that are being made (if any) with what is being reported.

Feedback will be invited with a gap analysis created identifying items, formats, timing that may help create a more positive perception. In consultation with the finance committee, the results will help us create and implement a clear process

of data collection and timing of communication. (NOTE – it will be important to have a clear process/reporting internally and externally).

Measures of success include:

1. Communication – Initial and ongoing both internal and external
2. Review – Yearly review with Finance Committee to ensure validity
3. Surveys – Yearly surveys of internal and external stakeholders to gauge perception and trust.

Implementation of this goal is targeted to accompany the Annual report in October 2025.

2B: GOAL: Create a Process around Stewardship Excellence for Leadership.

Rationale: As the committee discussed goal 2A above, the need for an ongoing documented process of excellence in stewardship internally was identified. As mentioned before, NCS is currently financially stable. In addition, Changes in leadership resulted in 3 out of 4 principals being new to the system in 2024/25. Therefore, to sustain financial stability and enable future growth, it is imperative that a clear process be put in place for NCS leadership to use and refer going forward.

Success/Metrics

Success of this process is ultimately measured by the continued financial stability of NCS. This success will be driven by a clearly communicated and executed process that defines accountabilities, creates best practices, and adheres to milestones and deadlines. As with many strategic initiatives, work and processes are already in practice and therefore, steps to attain this strategy will be:

1. Document the current process and areas currently being focused on for stewardship and the steps/schedule currently being adhered to.

2. Review and identify gaps and best practices.

3. Identify/Assign Accountabilities to each step/milestone

4. Create a timeline/schedule of the process with deadlines, milestones, and feedback.

5. Communication of process internally and externally (Finance Committee)

Measures for success will be:

1. Accountabilities with deliverables on schedule

2. Budget concerns identified in advance of need

3. Yearly review with Leadership with communication of changes

4. Financial Reporting (Goal 2A)

Implementation targeted for September/October 2025.

2C. GOAL: Increase and Identify diversity and amount of funds/donations to NCS

Rationale: Building on the goal of financial sustainability, it was identified as a strategic goal to explore diversity and increase in current donations as well as exploring additional sources (i.e. additional grants, partnerships, etc.). An increase in funds to the NCS System allows for growth and properly funding many other strategies including services, extra-curricular and professional development.

Success/Metrics

Success of this goal will be broken down into two categories: Donations and Diversification.

The goal of increasing donations is already being addressed and can be done with current resources. A clear and consistently communicated donor report would be a goal of this strategy, serving similar to a CRM/Sales report in a for-profit environment used for analysis, forecasting and business development. As with many strategies that are currently in place, first step will be to document current process and identify gaps in reporting, communication, and follow up. From this information, a donor report would be created an would include measurables such as:

1. Number of Donors
2. Repeat Donors (with frequency)
3. Amount Donated per Donor
4. Categorization of Donor (i.e. Current, Alumni, Community, etc.)

This report would then be incorporated into financial reporting (goal 2A).

Implementation of this goal is anticipated to be October 2025.

The second part of this strategy, diversification of funds is thought to need increased resources (i.e. grant writer, business relationship manager, etc..). The basic process around this goal would be to create a system of identifying funding options that are not currently being used such as grants, community partnerships, events, additional fundraisers, etc. An additional staff position would be created to manage this process and execute any duties related to the process (i.e. grant writing, business development, event planning).

Given the need for additional resources, we recommend that this goal be revisited at the next annual review of the strategic plan in May of 2026, with the goal of the other strategies creating additional funding for this initiative.

Measurements to gauge success would be:

1. Identification of 1-2 additional sources of funds per year
2. Success rate of obtaining these funds
3. Percentage of Revenue by source report showing increased diversity.
4. Integration into marketing and branding campaigns

3. STRATEGIC CATEGORY: FOSTER AND ENHANCE A CULTURE OF RESPECT AND TRUST

3A: GOAL – Define and Create a Consistent Process around Building Culture.

Rationale: Organizational culture is an evolving representation of the behaviors of those in the organization. If not defined and nurtured by leadership through example and values, it will be defined for them by employees, customers and stakeholders. In essence, in the absence of clearly defined expectations and values, culture can easily reflect each person's perception and interpretation. NCS's "Bring It" Character expectations of Responsibility, Respect, Integrity, Empathy, and Gratitude are at the core of the culture of success needed. In past surveys, we have received data that our culture is not where we want it to be and/or moving in the right direction. Therefore, the steering committee decided to incorporate into the strategic plan the goal of creating a consistent process to foster and build the culture needed, creating feedback systems to continually

analyze and build the culture around trust and respect – displaying all our core values.

Success/Metrics

Ultimate success of this process will be the execution of a continuous cycle of data gathering, feedback and adjustments to alert the leadership of any contradictions and to enhance and continually build the culture, increasing trust and respect in and between students, staff, parents/guardians and the parishes (community).

The committee recognized the work already being done and the overall positive culture currently exemplified. Therefore, first steps will be to

1. Define a template of Culture Variables that will be followed to include at least the 5 “bring its”.
2. Review current surveys against those variables
3. Create a new/updated Survey
4. Add to job descriptions and performance evaluations.

Subsequent steps will be to define the Process Loop that includes

- Data Collection/Processing
- Feedback
- Gap Analysis
- Adjustment/Communication
- Implementation

Culture integration will parallel the Process Loop by

- Incorporating Culture into the Performance Management Process
- Incorporating Culture into Student Success Profile
- Incorporating Culture into Professional Development programs

The Process Loop will be a yearly cycle with data collection and feedback obtained in Q3 & Q4 with communication and implementation of adjustments occurring in Q1.

Implementation of this process estimated September 2025.

3B: GOAL – Review/Revamp Onboarding Process to be Clear and Consistent.

Rationale: An effective way of building the culture that you desire as an organization is to have onboarding processes that are clear and consistent across organizational functions. These processes, when done well, create immediate engagement of employees, show respect, increase clarity in expectations and ultimately create cultures of individuals that have an outward mindset, focused not only on individual success but the success of others and the organization.

Success/Metrics

Success of this goal is staff and leadership working together to ensure that expectations are challenging, achievable, measured, and clear. Proper onboarding creates a baseline for these measures leading to early engagement and motivation for new employees. Checks and balances result and increases successful new hires or more timely separation of poor fit hires.

As with other goals, collection and review of current process and results is the first step. In parallel, feedback sessions will help identify the ideal process. A gap analysis comparing current to ideal state will be performed to create an updated onboarding process.

Subsequent steps will be communication of the process and implementation for all new hires. (NOTE: Upon completion it will be a leadership task to review and decide if current staff should go through the onboarding process (or a portion of it) to ensure consistency.

Measures of success will be:

1. Culture Scores (see Goal 3A) for staff
2. Adherence to timelines/milestones (see timeline below)
3. Staff Retention Rates
4. Student Retention Rates

Timeline of implementation: It is currently scheduled for Leadership to review onboarding processes in May of 2025. Therefore, it is estimated that an updated process will be rolled out in September of 2025. There will be a yearly cycle of looking at feedback and data in Q3/Q4 of each subsequent year with communication and implementation of updates in Q1 of the following year.

4. STRATEGIC CATEGORY: A BRANDING AND MARKETING STRATEGY ALIGNED WITH VALUES

4A: Goal – Create common internal messaging and training about the mission, vision, values and strategies of NCS.

Rationale:

In meetings with NCS Leadership, it was identified that an effective marketing and branding strategy begins with a consistent message coming internally from leadership and staff. Inconsistent messaging internally can be the primary source of misperceptions from our stakeholders and community. Therefore, creating and training our internal message is an important strategy. To help start this process, each member of the leadership team independently wrote what they thought NCS

was to them and the community. These statements were reviewed and incorporated during strategic planning sessions.

Success/Metrics

Success of this goal is having a document that explains guidelines and talking points of communicating the message and brand consistently in a way that aligns with our mission, vision, and values. Accompanying this document will be a training schedule incorporated into professional development and onboarding to ensure initial and continued focus on consistency and purpose.

From the individual leadership submissions mentioned above, it was clear that the basis of the internal message was already shared within the leadership. Therefore, the next steps of:

Creating a template/document explaining the messaging

Creating a training schedule

Performing the training

Could all be done within one quarter of approval of the strategic plan – goal of training in September – November of 2025 is attainable.

4B: Goal – Create an Internal Marketing Strategy for NCS.

Rationale:

Building on Goal 4A, the leadership recommended creating an internal marketing strategy that is consistent in its message and execution to positively influence the perception of stakeholders and the community and to provide inputs to the external marketing strategy (Goal 4C).

Success/Metrics:

The NCS Leadership put together a timeline and steps to developing this goal.

1. April – June 2025: Creation of Value Proposition(s) and Internal Story (Goal 4A)

2. June – August 2025: Create Training Process

4. September – December 2025: Initial Training of Internal Staff

5. January – May 2026: Create draft of internal Marketing Strategy.

6. July – October 2026: Document feedback of past trainings and feedback sessions. Incorporate Feedback into strategy.

7. January 2027: Formal implementation of strategy.

4C: Goal – Create a Year-round External Marketing and Branding Strategy

Rationale:

NCS does a fair amount of external marketing using a variety of channels (Social Media, Internet, Print, Radio, TV, Billboards, etc.) with differing degrees of success. During our strategic planning meetings, it was recognized that many of our marketing initiatives seemed driven by reaction to a situation versus driven strategically. Marketing this way is difficult to measure and resource plan, many times leading to increases in cost or both material and staff resources. In addition, it puts a level of complexity when analyzing future budgeting for marketing efforts. This strategy was created to address these concerns and have NCS be consistent and year-round in their marketing (while still adding additional focus when needed – i.e. Catholic Schools Week/registration).

Success/Metrics:

In parallel with the internal marketing strategy (4B), the following timeline and schedule were put together to create a formal external marketing strategy by 2027.

1. April – June 2025: Document current strategy/efforts, define ideal state, and create a gap analysis.

2. August – November 2025: Gather internal feedback via surveys and focus groups. (parents and parishes involved)

3. January – May 2026: Create a draft of an external marketing strategy

4. August – November 2026: Testing of strategy / Gathering of feedback / Implementing Adjustments and Finalization of Strategy

5. January 2027: Implement New External Marketing Strategy

This implementation schedule parallels the internal marketing strategy allowing for the entire strategy to be functional at the same time. Yearly review Q1/Q2 of each year will be done to coincide with any updates/changes being budgeted and implemented at the beginning of a fiscal year (January - Q3 of the school year).

Measures of Success will include:

1. Consistent marketing budget with proper allocation of resources and material.

2. Proper analyzation of marketing efforts – measures will include reach, theme, timing, market segment, ROI (if appropriate), engagement and perception (parish, community)

3. Increased decision making and proper budgeting around unplanned events.

4. Communication of accountabilities, timing and schedule to NCS internal staff and departments.

5. STRATEGIC CATEGORY: PARISH RELATIONS

5A: Goal – Create a Playbook to Answer the Question "How can NCS contribute positively to parish relations"

Rationale:

Parish relations was a strategy born by the parent advisory committee that met in 2023/24. This strategy is based on perceptions, comments and surveys that do not always positively reflect on how parishes view NCS and vice versa. In strategic planning meetings with NCS leadership, it was decided to approach this issue from a position of internal responsibility, focusing on what NCS can do to create a more positive view of NCS in the eyes of the parishes. Therefore, this first goal is to answer that question internally as a leadership group and create a playbook that can be executed, communicated and adjusted with feedback. There is an understanding that there will need to be interaction and participation with parish staff/leadership to realize this goal. However, NCS leadership thought an initial goal of identifying internal strengths and weaknesses was an essential first step.

Success/Metrics:

Ultimate success of this goal is consistent, positive relations between the parishes and NCS, where each are supporting different initiatives, listening to feedback, and adjusting efforts along the way. However, to address this goal specifically, the following steps will be executed:

1. NCS Leadership to perform and Internal SWOT Analysis as it relates to their involvement in parish relations (positive and negative). SWOT Analysis involves identifying Strengths, Weaknesses, Opportunities and Threats to the strategy/question at hand.

2. Create a report and subsequent playbook outlining the analysis and steps NCS leadership feels it can accomplish that will make a positive impact on parish relations.

3. Obtain feedback from Parish leadership (Priest, DRE, etc.)

4. Perform and External SWOT to include parish leadership (This step will be reevaluated after feedback gathered to determine necessity).

Timeline would be to complete the Internal SWOT and playbook by August of 2025 with feedback being collected by December of 2025.

An additional goal of this process is to set up a mechanism of consistent feedback and surveying of parish relations to enable measuring the success of both the playbook and the process.

5B: Goal – Creation of a Parish Liaison/Campus Minister Position

Rationale:

Building on Goal 5A, the possible advantage of the role of a Campus Minister/Parish Liaison position surfaced multiple times in our strategic planning meetings when discussing parish relations. It has been a position in the past that has gone away for a variety of reasons. Discussions renewed in whether it was feasible in reinventing that position. Understanding that current resources are not allowing for this to be a separate new position(s), the importance of the duties were noted and

thought to be a strategy to explore. The hope is that other strategies being successful could eventually lead to resources being available to make this a separate, permanent position. Therefore, this goal in the short-term will be to focus on the job duties and prioritization of those duties using current staff/resources.

Success/Metrics:

Given our past experience with this type of position, we can use past information and documentation to aid in this goal. Integration of the items in goal 5A will be important as well to help shape these duties to have the highest impact with the lowest level of implementation (time and cost).

Steps in this process will be:

1. NCS Leadership to create job duties and functions of this position using past job description and current SWOT Analysis.
2. Create new job description
3. In the absence of funding, identify job duties with acute impact/need and identify accountabilities for each job duty. (i.e. Weekly bulletin announcement for each parish done by marketing)
4. Create an implementation plan
5. Gather feedback from Parishes on the plan / adjust if necessary
6. Implementation

Steps 1-5 are estimated to be accomplished in May – August of 2025 with communication and implementation in September of 2025.

Measuring success will be tied to overall parish relations survey data that were discussed in goal 5A above.

To position for the future, an additional key measurement will be documentation of the amount of time/resources for each duty to gauge resource level and timing of approval of a separate position.

REVIEW/UPDATES

A strategic plan is not meant to be a static document. It is meant to serve as a compass rather than an inflexible blueprint for action. The intent of this document is to identify key goals and provide clear measurements of success to create efficiencies in process and operations with an end goal of serving the Mission of Newman Catholic Schools and exemplifying our core values.

A critical next step is to create an operational plan for this strategic plan. That operational plan, assuming each goal is its own project, will entail:

- Identification of Project Lead(s)
- Detailed Project Plan with milestones, deadlines and budgets.
- Identification of critical success factors and monitoring strategies to show progress toward the goal.

This strategic plan will be formally evaluated and updated at the beginning of each fiscal year at a minimum to help define annual objectives and to identify and define any changes resulting from unexpected changes. Any updates will be documented to ensure that, operationally, NCS is working from the most updated version.