

***Regis Catholic Schools***  
***Advancement Assessment – Summary Report***  
***February 15, 2011***

***Strategic Insights***

In order for any Catholic school system to achieve its greatest potential a variety of components of organizational behavior must be in place to ensure sustained confidence in its mission and thus its ability to succeed. The following is a summary of strategic insights that resulted from the assessment at Regis Catholic Schools. The assessment focused on organizational behavior, staffing, structure and communication.

***Vision:***

Throughout the assessment, interviewees expressed support for the mission of Regis Catholic Schools. At the same time, however, the interviews revealed a vagueness and inability to articulate the vision of the system. While there is confidence in the future of Regis Catholic Schools there also are concerns related to enrollment and the ability to attract significant philanthropic support. For the future of the system, it is imperative that these needs be actively addressed, clearly articulated and effectively communicated through a strategic visioning and planning process.

For RCS to reach its optimal level of success in advancement, the vision for the future and plans for its implementation must be clear. It is vital that members of the RCS Administration; Pastors and other Education Commission, Foundation, Faculty and Staff members; Alumnae, Parents, Friends, and members of the Eau Claire area business community be able to know, understand, believe and articulate the vision for Regis Catholic Schools.

***Leadership:***

Every prominent Catholic school system has a successful and vibrant advancement program associated with its leadership structure. To this point, the school or system leadership must be both visionary and strategic -- capable of implementing plans, hiring and empowering talented and dedicated staff, recruiting, engaging and empowering key volunteers, and communicating their belief in the mission and vision of the school in compelling ways that encourages reaching “optimal enrollment” and generating significant philanthropic support.

Interviewees consistently expressed confidence, much gratitude and appreciation for the dedication and hard work of system President, Joe Eisenhuth. Also, consistently expressed was gratitude and appreciation for the support of various Eau Claire Area Catholic Pastors and their parishes. Most interviewees were unclear regarding the members and role of the RCS Education Commission and Foundation Board.

Further, the interviews revealed an undertone of frustration identified primarily in the area of implementation of strategic plans in the advancement area. In fact, very few interviewees could articulate anything about the RCS advancement program other than that there were various “development fundraising” events and programs. Few interviewees have any sense of the importance of a comprehensive advancement model. It was obvious, however, that each person interviewed was interested if the interview session allowed the opportunity to explain and introduce the advancement model concept. There was associated frustration that a model such as the comprehensive advancement plan might never quite make it to implementation or, that any initiative to establish a comprehensive and integrated advancement plan might not be given the time, resources and staffing needed to realize its full potential.

In conjunction, interviewees expressed interest in developing a consistent and focused advancement initiative that is structured and administered to “advance the mission of RCS”, specifically relating to attaining “optimal” enrollment and securing ongoing and transformational philanthropic support.

Within the RCS system there is no defined vision or accountable leadership to champion and administer an advancement program. There is no Advancement Director and no Enrollment Management Director. What is in place is sparse staffing, fragmented fundraising initiatives and little, if any, true understanding of what needs be accomplished -- and what could be possible.

### **Results:**

In conjunction with the discovery relating to the absence of a strategic Advancement vision, staffing and organization, there does not seem to be any coordinated system tracking historical advancement results. A review of past efforts revealed disorganized, inaccurate and incomplete data. Communication of past development efforts and results was also seen as inconsistent or non-existent. This is of significant concern as tracking and reporting results is basic to stewarding donors, administering ongoing genuine cultivation of stakeholders and gaining the support from and confidence of stakeholders and system leaders for future investment in advancement related activities.

### **Summary (Vision, Leadership and Results)**

The RCS advancement program clearly needs an infusion of strategic vision, establishment of tactical responsibilities and the development of a matrix to track measurable results. Absent a renewed commitment and investment in a comprehensive organizational structure which promotes best practices in Catholic school advancement, Regis Catholic Schools will continue to underperform and risk ensuring its viability and sustainability in support of its mission.

### **Representative Interviewee Comments**

As Regis Catholic Schools looks to reach its optimal level of success in advancement, its vision for the future, as well as implementation of a resultant plan, the following provide representative comments from interviewees who, generally, spoke very positively about the system:

- *“Regis is family to us.”*
- *“We are genuinely concerned about the system’s future.”*
- *“Regis offers a great product but it could be better. In order for Regis to maintain itself it needs to raise the bar, especially at the middle and high school levels.”*
- *“We are looking for a plan before we will provide financial support. We are hopeful these assessment sessions will initiate a process to develop a strategic plan.”*
- *“We need to get the message out.”*
- *“We have to quit talking about and waiting for the same people to provide financial resources needed to get the system to the next level... everyone needs to support Regis Catholic Schools.”*
- *“We think that Regis is headed in the right direction. However, we are just not sure they know where they want to go.”*
- *“The system has made exceptional progress in the past two to three years but is being held up by the conservative and non-visionary thinking of some constituents.”*
- *“The President is an effective leader who needs the broad based support of Regis’ constituency to optimize opportunities and the potential of RCS at this time in history.”*

## **TAC Insights and Observations**

- Many Regis stakeholders are “hanging on this assessment” with a keen eye on the future. Stakeholders will be watching closely if there is follow-up to the assessment recommendations.
- When it comes to viability, sustainability and growth there are only two things that really count -- “students and money”.
- The system has gotten as skinny as it dare. It is time to build the system back up. And, the way to do so is by way of re-establishing and re-configuring the Advancement program.
- “If a school aspires to prominence, there must be a change in the value the school itself places on its work. There must be a change in how the school views its own potential if it hopes to increase the value – and thus, the investment – its constituents place in the school”. When it comes to parents of children, they expect excellence and are not going to “settle for less”.
- The reduction of system debt in recent years from \$2M to a more manageable \$1M is an important accomplishment. The resolve of system leadership to continue to “chip away” at that debt responsibility and their proven ability to make many other significant financial management improvements will pay dividends as the system moves toward viability and sustainability.
- The system must continue to develop its Regis Catholic Schools “brand”. Continue to investigate “who you are” and how you are positioned -- specifically relating to what distinguishes you from your competition. Then, train and inform your faculty, staff and constituents to use the resultant messaging to attract both “students and money”.
- The Regis Catholic Schools have captured the heart of its constituents and stakeholders ... now it is the systems responsibility to complete the vision with the implementation of a comprehensive Advancement program.
- The Catholic community in Eau Claire consists of all Parishes and the Catholic School System...parishes and the school system define the Catholic atmosphere in the Eau Claire area.

## **Recommendations**

In order for Regis Catholic Schools to truly achieve optimum strategic results, a concerted investment of resources and time will be necessary. **Based on careful, realistic, strategically planned revenue goal setting, choices will need to be made in regards to a time-table for implementation, staffing, technology, communications, constituent relations, volunteer management, research and stewardship.**

For any school that has significant revenue expectations of advancement there must be adequate resources and personnel. The two areas of advancement focus are “students and money”. These two areas are among the most critical for the system to remain viable and sustainable -- while growing the system at the same time.

All recommendations detailed below are provided under the backdrop of the following -- How can the Regis Catholic Schools system sustain its mission while successfully moving Catholic education in the Eau Claire area into an improved position of viability, sustainability and growth in light of the financial realities the system faces today?

### **Strategic Planning/Visioning**

- It is recommended that Regis Catholic Schools begin a system wide strategic planning process for providing an opportunity for key stakeholders to reflect upon the school’s mission and vision.

### **Annual Planning**

- Annually the system should develop a tactical plan to achieve ambitious goals for advancement.

## **Leadership**

- Establish the President as the Chief Mission and Advancement Officer for the system.
- Establish and publish a system-wide staff organizational flow chart  
*\*This means that the organizational structure of RCS must be in harmony with and function to support the Advancement Program. Roles, duties and responsibilities of system administrator positions and other Central Office staff need to be redefined in a manner that will allow the President to effectively serve as the Chief Mission and Advancement Officer. Inherent in these positions is the expectation that they each function in support of the Advancement Program – as a shared responsibility.*
- In conjunction with the above, the President must create the ongoing opportunities to become more visible and present in each of the system schools -- on a consistent basis.
- Take steps to insure that the RCS Education Commission leadership and membership is both seamless and effective as it relates to partnering and supporting Regis Catholic Schools.
- Take steps to insure that the RCS Foundation leadership and membership is both seamless and effective as it relates to partnering and supporting Regis Catholic Schools.

## **Enrollment Management**

- Establish a systematized enrollment management program that offers the best solutions -- with a scientific approach to optimizing enrollment, thus providing the system with a foundation for viability and sustainability.
- Establish an “optimal” enrollment figure for the system.
- Identify and hire an enrollment management (admissions) director.
- Retain TAC to train an enrollment management director, central office leadership, school leadership and associated staff personnel in the science of enrollment management.

## **Advancement**

- Commit to re-establish and invest in building a system-wide comprehensive Advancement Program.
- Immediately begin to identify the positions and define the duties of these positions as they relate to supporting the Advancement Program.
- Craft a compelling case for providing ongoing philanthropic support of Regis Catholic Schools.
- Review all fundraising and Special Events to not only ensure greatest revenue yield (i.e. examining and instituting a strategic approach to grow revenue) but re-evaluating these events across the board relating to building community, sharing the vision/mission and engaging donor prospects.
- Re-establish an Annual Fund Commitment Program centered on creating increased revenue as budget enhancement dollars to support on-going mission initiatives that have a tangible and visible impact in the school (i.e. increase the commitments of constituents to establish RCS as charitable priority from the significant number of stakeholders that the system enjoys).
- Invest in a growing and sustainable Major Gifts Initiative designed to provide for financial assistance, staff compensation and development, facility/campus enhancements, technology and teaching materials and endowment growth from a qualified audience of 50 -75 prospects in order to generate significant revenue without the high labor of a capital campaign.
- Establish a Cost of Education Partnership© program for all RCS families educating them on the actual cost to educate their child and elicit charitable commitments for the difference between stated tuition and actual cost. – there are at least 20%+ families that could meet the actual cost and the 50%+ who could contribute some percentage thereof.
- Establish a “Patron Saint” program to provide both budget relief and unfunded enhancements for RCS sponsored programs.
- Consider serving as the catalyst (and conduit) to assist your “parish partners” in gaining sustained offertory support and participation by way of ministry involvement through the Commitment to Parish Life© Program.
- Initiate a planned giving program/strategy.
- Ensure that all auxiliary organizations and activity booster groups work cooperatively with the central office and/or advancement program.
- Retain *The Advancement Counsel*.