

National Standards and Benchmarks
for Effective Catholic Elementary
and Secondary Schools

Introduction to Standards and Benchmarks

Catholic Schools in collaboration with parents and guardians as the primary educators, seek to educate the whole child by providing an excellent education rooted in Gospel values. Since the founding of the first Catholic school, the United States Catholic Bishops speaking in conference have supported Catholic schools as foundational to the mission of the Church. As recently as 2008, Pope Benedict XVI, during his visit to the United States, stated that “Catholic schools are an outstanding apostolate of hope . . . addressing the material, intellectual and spiritual needs of three million children.” (Pope Benedict XVI, Address to Catholic Educators, April 17, 2008, Washington DC, par. 5)). The bishops of the United States, particularly in the seminal document, *To Teach as Jesus Did (1971)*, continuously underscore the three-fold mission of our Catholic schools—to proclaim the Gospel, to build community, and to serve our brothers and sisters. In their most recent document, *Renewing Our Commitment to Catholic Elementary and Secondary Schools in the Third Millennium (2005)*, the United States Catholic Bishops emphasized that the entire Catholic community is called to evangelize our culture, and stressed that Catholic elementary and secondary schools play a critical and irreplaceable role in this endeavor. In this same document, the bishops committed themselves and called on the entire Catholic community to ensure that Catholic schools continue to provide a Gospel-based education of the highest quality. “Education is integral to the mission of the Church to proclaim the good news. First and foremost, every Catholic institution is a place to encounter the Living God, who in Jesus Christ, reveals His transforming love and truth.” (Pope Benedict XVI Address to Catholic Educators, April 17, 2008, Washington DC, par. 2)

While the bishops in their document, *Renewing our Commitment to Catholic Elementary and Secondary Schools in the Third Millennium (2005)*, recognized challenges in the areas of the changing face of our Church, personnel, and finances, they expressed strong commitment to the future of Catholic schools. They called on the Catholic community to reach out to the broader community in order to address these challenges. “Our vision is clear: our Catholic schools are a vital part of the teaching mission of the Church. . . . We must respond to challenging times with faith, vision and the will to succeed because the Catholic school’s mission is vital to the future of our young people, our nation, and most especially our Church.” (United States Conference of Catholic Bishops, *Renewing Our Commitment to Catholic Elementary and Secondary Schools in the Third Millennium*, 15)

Recognizing the imperative that Catholic schools must provide an excellent academic program within a faith-filled environment, these *National Standards and Benchmarks for Effective Catholic Elementary and Secondary Schools* have been produced to provide a national articulation of defining characteristics and performance benchmarks that will enable all sponsors of Catholic elementary and secondary schools to assess, strengthen, and sustain their operations. The rich conversation among diocesan personnel, school leaders, Catholic educational networks, the National Catholic Educational Association (NCEA), and Catholic university scholars and leaders at the Catholic Higher Education Collaborative (CHEC) Conference on school leadership held at Loyola University Chicago in October, 2009, surfaced the possibility and desirability of joining many voices into a single foundational statement that

could serve as a basis for developing and validating local standards with the added credibility of a broader national vision. More specifically, conference participants voiced the conviction that collectively endorsed national standards supported and advocated by the Bishops offer the opportunity for the Catholic community to: clarify the “brand” of “Catholic school”; provide a framework to enhance public policy and advocacy efforts on behalf of Catholic schools; provide universal characteristics and criteria that could serve as a basis of Catholic school accreditation; provide a link to Catholic Higher Education professional development and leadership programs in support of Catholic schools; and increase funders’ confidence in school capacity for sustainable improvement. A number of local dioceses, Catholic school networks, and Catholic school accrediting agencies have developed similar documents for their schools. The publication of this document in no way intends to supplant or diminish their work.

The *National Standards and Benchmarks for Effective Catholic Elementary and Secondary Schools* is intended to describe how the most mission-driven, program effective, well managed, and responsibly governed Catholic schools operate. They are offered as school effectiveness standards rather than curriculum content standards, although they support curriculum development consistent with national standards and the Common Core State Standards. They provide benchmarks to determine how well a school is fulfilling its obligation to those who benefit from its services (e.g. students, parents/guardians and families, faculty and staff), to donors and contributors, to the Church, and to civil society. Catholic schools and sponsors are encouraged to commit to the defining characteristics and performance benchmarks of the *National Standards and Benchmarks for Effective Catholic Elementary and Secondary Schools* and to work toward implementing the principles and practices outlined here within the context of their own culture and community.

This document contains three types of statements grounded in Church teachings, best practice, and proven success of those committed to the future of Catholic elementary and secondary education in the United States.

The ***Defining Characteristics*** flow directly from the Holy See’s teaching on Catholic schools as compiled by Archbishop J. Michael Miller, CSB (*The Holy See’s Teaching on Catholic Schools*, 2006), and from statements by Pope Benedict XVI and the American bishops. The characteristics define the deep Catholic identity of Catholic schools and serve as the platform on which the standards and benchmarks rest. The defining characteristics authenticate the standards and benchmarks, justifying their existence and providing their meaning.

The ***Standards*** describe policies, programs, structures, and processes that should be present in mission-driven, program effective, well-managed, and responsibly governed Catholic schools that operate in concert with the defining characteristics. The standards address four domains: Mission and Catholic Identity, Governance and Leadership, Academic Excellence, and Operational Vitality.

The ***Benchmarks*** provide observable, measurable descriptors for each standard. Benchmarks provide a solid basis for future development of more detailed self-assessment and diagnostic

instruments, data collection and reporting structures, and accreditation tools, as appropriate at the local, diocesan, regional, and national levels.

National Standards and Benchmarks for Effective Catholic Elementary and Secondary Schools was drafted by a national task force of Catholic school educators and supporters, in communication with the National Catholic Educational Association (NCEA). The first draft was reviewed by participants at the Chief Administrators of Catholic Education (CACE) annual conference in October, 2010. Using the feedback from CACE, the task force crafted the second draft for open review at the NCEA national convention in April, 2011. Two sessions were attended by stakeholders representing all levels of leadership. Following revisions to Draft 2, the Task Force invited selected domain experts, leaders in Catholic education, Bishops, pastors, and other key stakeholders to provide a final round of feedback on the third draft. A fully vetted and revised document is now offered to the entire community January, 2012.

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Defining Characteristics of Catholic Schools

1. Centered in the Person of Jesus Christ

Catholic education is rooted in the conviction that Jesus Christ provides the most comprehensive and compelling example of the realization of full human potential. (*The Catholic School*, 34, 35) In every aspect of programs, life, and activities, Catholic schools should foster personal relationship with Jesus Christ and communal witness to the Gospel message of love of God and neighbor and service to the world, especially the poor and marginalized. (Miller, *The Holy See's Teachings on Catholic Schools*, 25–26)

2. Contributing to the Evangelizing Mission of the Church

By reason of its educational activity, Catholic schools participate directly and in a privileged way in the evangelizing mission of the church. (*The Catholic School*, 9; *The Catholic School on the Threshold of the Third Millennium*, 5, 11; *The Religious Dimensions of Education in a Catholic School*, 33) As an ecclesial entity where faith, culture, and life are brought into harmony, the Catholic school should be a place of real and specified pastoral ministry in communion with the local Bishop. (*The Catholic School*, 44; *The Catholic School on the Threshold of the Third Millennium*, 14; *The Religious Dimension of Education in a Catholic School*, 34;) The environment in Catholic schools should express the signs of Catholic culture, physically, and visibly. (*The Religious Dimension of Education in a Catholic School*, 25; Miller, 40)

3. Distinguished by Excellence

Church documents, history, and practices, supported by Canon Law, establish that first and foremost a Catholic school is characterized by excellence. Consistent with the defining characteristics, Catholic schools should implement on-going processes and structures and gather evidence to ensure excellence in every aspect of its programs, life, and activities. (*Gravissimum Educationis* 8 and 9; *Code of Canon Law*, Canon 806 #2)

4. Committed to Educate the Whole Child

Catholic school education is rooted in the conviction that human beings have a transcendent destiny, and that education for the whole person must form the spiritual, intellectual, physical, psychological, social, moral, aesthetic and religious capacities of each child. Catholic schools should develop and implement academic, co-curricular, faith-formation, and service/ministry programs to educate the whole child in all these dimensions. (*The Catholic School*, 29)

5. Steeped in a Catholic Worldview

Catholic education aims at the integral formation of the human person, which includes “preparation for professional life, formation of ethical and social awareness, developing awareness of the transcendental, and religious education” (*The Catholic School*, 31). All curriculum and instruction in a Catholic school should foster: the desire to seek wisdom and truth, the preference for social justice, the discipline to become self-learners, the capacity to recognize ethical and moral grounding for behavior, and the responsibility to transform and enrich the world with Gospel values. The Catholic school should avoid the error that its distinctiveness rests solely on its religious education program. (Miller, 43–45, 52)

6. Sustained by Gospel Witness

Catholic schools pay attention to the vocation of teachers and their participation in the Church’s evangelizing mission. (*The Catholic School on the Threshold of the Third Millennium*, 19; *Lay Catholics in Schools*, 37) A Catholic educator is a role model for students and gives testimony by his or her life and commitment to mission. (Benedict XVI, June, 2005; Miller, 53) As much as possible, Catholic schools should recruit teachers who are practicing Catholics, who can understand and accept the teachings of the Catholic Church and the moral demands of the Gospel, and who can contribute to the achievement of the school’s Catholic identity and apostolic goals, including participation in the school’s commitment to social justice and evangelization. (United States Conference of Catholic Bishops, *National Directory for Catechesis*, 231)

7. Shaped by Communion and Community

Catholic school education places an emphasis on the school as community—an educational community of persons and a genuine community of faith. (*Lay Catholics in Schools*, 41, 22) Catholic schools should do everything they can to promote genuine trust and collaboration among teachers, with parents as the primary educators of their children, and with governing body members to foster appreciation of different gifts that build up a learning and faith community and strengthen academic excellence. (*Lay Catholics in Schools*, 78) The Catholic school should pay especially close attention to the quality of interpersonal relations between teachers and students, ensuring that the student is seen as a person whose intellectual growth is harmonized with spiritual, religious, emotional, and social growth. (*The Catholic School on the Threshold of the Third Millennium*, 18)

8. Accessible to All Students

By reason of their evangelizing mission, Catholic schools should be available to all people who desire a Catholic school education for their children. (*Gravissimum Educationis*, 6; *Code of Canon Law*, Canons 793 #2; *Renewing Our Commitment to Catholic Elementary and Secondary Schools in the Third Millennium*, Introduction;) Catholic schools in concert with the Catholic community should do everything in their power to manage available resources and seek innovative options to ensure that Catholic school education is geographically, programmatically, physically, and financially accessible.

9. Established by the Expressed Authority of the Bishop

Canon Law states, “Pastors of souls have the duty of making all possible arrangements so that all the faithful may avail themselves of a Catholic education” (*Code of Canon Law*, Canon 794). Bishops need to put forward the mission of Catholic schools, support and enhance the work of Catholic schools, and see that the education in the schools is based on principles of Catholic doctrine. (John Paul II, *Pastores Gregis*, 52) Catholic schools have a formal and defined relationship with the Bishop guided by a spirituality of ecclesial communion, and should work to establish a relationship marked by mutual trust, close cooperation, continuing dialogue, and respect for the Bishop’s legitimate authority. (*Code of Canon Law*, Canon 803 #1 and #3; Miller, 33)

Summary of Standards

Mission and Catholic Identity

Standard 1:

An excellent Catholic school is guided and driven by a clearly communicated mission that embraces a Catholic Identity rooted in Gospel values, centered on the Eucharist, and committed to faith formation, academic excellence and service.

Standard 2:

An excellent Catholic school adhering to mission provides a rigorous academic program for religious studies and catechesis in the Catholic faith, set within a total academic curriculum that integrates faith, culture, and life.

Standard 3:

An excellent Catholic school adhering to mission provides opportunities outside the classroom for student faith formation, participation in liturgical and communal prayer, and action in service of social justice.

Standard 4:

An excellent Catholic school adhering to mission provides opportunities for adult faith formation and action in service of social justice.

Governance and Leadership

Standard 5:

An excellent Catholic school has a governing body (person or persons) which recognizes and respects the role(s) of the appropriate and legitimate authorities, and exercises responsible decision making (authoritative, consultative, advisory) in collaboration with the leadership team for development and oversight of the school's fidelity to mission, academic excellence, and operational vitality.

Standard 6:

An excellent Catholic school has a qualified leader/leadership team empowered by the governing body to realize and implement the school's mission and vision.

Academic Excellence

Standard 7:

An excellent Catholic school has a clearly articulated rigorous curriculum aligned with relevant standards, 21st century skills, and Gospel values, implemented through effective instruction.

Standard 8:

An excellent Catholic school uses school-wide assessment methods and practices to document student learning and program effectiveness, to make student performances transparent, and to inform the continuous review of curriculum and the improvement of instructional practices.

Standard 9:

An excellent Catholic school provides programs and services aligned with the mission to enrich the academic program and support the development of student and family life.

Operational Vitality

Standard 10:

An excellent Catholic school provides a feasible three to five year financial plan that includes both current and projected budgets and is the result of a collaborative process, emphasizing faithful stewardship.

Standard 11:

An excellent Catholic school operates in accord with published human resource/personnel policies developed in compliance with (arch)diocesan policies and/or religious congregation sponsorship policies, which affect all staff (clergy, religious women and men, laity and volunteers) and provide clarity for responsibilities, expectations and accountability.

Standard 12:

An excellent Catholic school develops and maintains a facilities, equipment, and technology management plan designed to continuously support the implementation of the educational mission of the school.

Standard 13:

An excellent Catholic school enacts a comprehensive plan, based on a compelling mission, for institutional advancement through communications, marketing, enrollment management, and development.

Mission and Catholic Identity: Standards and Benchmarks

The Church's teaching mission includes inviting young people to a relationship with Jesus Christ or deepening an existing relationship with Jesus, inserting young people into the life of the Church, and assisting young people to see and understand the role of faith in one's daily life and in the larger society. "This unique Catholic identity makes our Catholic elementary and secondary schools 'schools for the human person' and allows them to fill a critical role in the future life of our Church, our country and our world." (*The Catholic School on the Threshold of the Third Millennium, 1997*) The following standards address Catholic identity and culture as vital to the mission of Catholic schools in the United States.

Standard 1:

An excellent Catholic school is guided and driven by a clearly communicated mission that embraces a Catholic Identity rooted in Gospel values, centered on the Eucharist, and committed to faith formation, academic excellence and service.

Benchmarks:

- 1.1 The governing body and the leader/leadership team ensure that the mission statement includes the commitment to Catholic identity.
- 1.2 The governing body and the leader/leadership team use the mission statement as the foundation and normative reference for all planning.
- 1.3 The school leader/leadership team regularly calls together the school's various constituencies (including but not limited to faculty and staff, parents, students, alumni(ae)) to clarify, review and renew the school's mission statement.
- 1.4 The mission statement is visible in public places and contained in official documents.
- 1.5 All constituents know and understand the mission.

Standard 2:

An excellent Catholic school adhering to mission provides a rigorous academic program for religious studies and catechesis in the Catholic faith, set within a total academic curriculum that integrates faith, culture, and life.

Benchmarks:

- 2.1 Religious education curriculum and instruction meets the religious education requirements and standards of the (arch)diocese.
- 2.2 Religion classes are an integral part of the academic program in the assignment of teachers, amount of class time and the selection of texts and other curricular materials.
- 2.3 Faculty who teach religion meet (arch)diocesan requirements for academic and catechetical preparation and certification to provide effective religion curriculum and instruction.
- 2.4 The school's Catholic identity requires excellence in academic and intellectual formation in all subjects including religious education.

- 2.5 Faculty use the lenses of Scripture and the Catholic intellectual tradition in all subjects to help students think critically and ethically about the world around them.
- 2.6 Catholic culture and faith are expressed in the school through multiple and diverse forms of visual and performing arts, music and architecture.
- 2.7 The theory and practice of the Church's social teachings are essential elements of the curriculum.

Standard 3:

An excellent Catholic school adhering to mission provides opportunities outside the classroom for student faith formation, participation in liturgical and communal prayer, and action in service of social justice.

Benchmarks:

- 3.1 Every student is offered timely and regular opportunities to learn about and experience the nature and importance of prayer, the Eucharist, and liturgy.
- 3.2 Every student is offered timely, regular, and age-appropriate opportunities to reflect on their life experiences and faith through retreats and other spiritual experiences.
- 3.3 Every student participates in Christian service programs to promote the lived reality of action in service of social justice.
- 3.4 Every student experiences role models of faith and service for social justice among the administrators, faculty and staff.

Standard 4:

An excellent Catholic school adhering to mission provides opportunities for adult faith formation and action in service of social justice.

Benchmarks:

- 4.1 The leader/leadership team provides retreats and other spiritual experiences for the faculty and staff on a regular and timely basis.
- 4.2 The leader/leadership team and faculty assist parents in their role as the primary educators of their children in faith.
- 4.3 The leader/leadership team collaborates with other institutions (for example, Catholic Charities, Catholic higher education, religious congregation-sponsored programs) to provide opportunities for parents to grow in the knowledge and practice of the faith.
- 4.4 All adults in the school community are invited to participate in Christian service programs to promote the lived reality of action in service of social justice.
- 4.5 Every administrator, faculty, and staff member visibly supports the faith life of the school community.

Governance and Leadership: Standards and Benchmarks

Central to the mission of the Church is the work of Catholic school education. The success of this mission depends on the key components of effective governance, which provides direction or authority, and leadership, which ensures effective operations. Catholic school governance and leadership can be seen as a ministry that promotes and protects the responsibilities and rights of the school community. Governance and leadership based on the principles and practices of excellence are essential to insuring the Catholic identity, academic excellence, and operational vitality of the school. Although governance models vary based on the sponsorship of the school, those who serve on the governing body or leadership team in Catholic schools provide for an environment for the teaching of doctrine and Sacred Scripture, the building and experiencing of community, the serving of others, and the opportunity for worship.

Standard 5:

An excellent Catholic school has a governing body (person or persons) which recognizes and respects the role(s) of the appropriate and legitimate authorities, and exercises responsible decision making (authoritative, consultative, advisory) in collaboration with the leadership team for development and oversight of the school's fidelity to mission, academic excellence, and operational vitality.

Benchmarks:

- 5.1 The governing body, representing the diversity of stakeholders, functions according to its approved constitution and by-laws.
- 5.2 The governing body systematizes the policies of the school's operations to ensure fidelity to mission, and continuity and sustainability through leadership successions.
- 5.3 The governing body, in collaboration with or through the actions of the leader/leadership team, maintains a relationship with the Bishop marked by mutual trust, close cooperation, continuing dialogue, and respect for the Bishop's legitimate authority.
- 5.4 The governing body, in collaboration with or through the actions of the leader/leadership team, maintains a constructive and beneficial relationship with the (arch)diocesan Education Office consistent with (arch)diocesan policy pertaining to the recognition of Catholic schools by the Bishop.
- 5.5 In the case of a parish school, the governing body, in collaboration with the leader/leadership team, maintains a relationship with the canonical administrator (pastor or designee of Bishop) marked by mutual trust, close cooperation, and continuing dialogue.
- 5.6 The governing body engages in formation and on-going training and self-evaluation for itself and the leadership team to ensure the faithful execution of their respective responsibilities.

Standard 6:

An excellent Catholic school has a qualified leader/leadership team empowered by the governing body to realize and implement the school's mission and vision.

Benchmarks:

- 6.1 The leader/leadership team meets national, state and/or (arch)diocesan requirements for school leadership preparation and licensing to serve as the faith and instructional leader(s) of the school.
- 6.2 The leader/leadership team articulates a clear mission and vision for the school, and engages the school community to ensure a school culture that embodies the mission and vision.
- 6.3 The leader/leadership team takes responsibility for the development and oversight of personnel, including recruitment, professional growth, faith formation, and formal assessment of faculty and staff in compliance with (arch)diocesan policies and/or religious congregation sponsorship policies.
- 6.4 The leader/leadership team establishes and supports networks of collaboration at all levels within the school community to advance excellence.
- 6.5 The leader/leadership team directs the development and continuous improvement of curriculum and instruction, and utilizes school-wide data to plan for continued and sustained academic excellence and growth.
- 6.6 The leader/leadership team works in collaboration with the governing body to provide an infrastructure of programs and services that ensures the operational vitality of the school.
- 6.7 The leader/leadership team assumes responsibility for communicating new initiatives and/or changes to school programs to all constituents.

Academic Excellence: Standards and Benchmarks

The United States Conference of Catholic Bishops affirms the message of the Congregation on Catholic Education that intellectual development of the person and growth as a Christian go forward hand in hand. Rooted in the mission of the Church, the Catholic school brings faith, culture and life together in harmony. In 2005, the bishops noted that “young people of the third millennium must be a source of energy and leadership in our Church and our nation. And, therefore, we must provide young people with an academically rigorous and doctrinally sound program of education.” (*Renewing Our Commitment to Catholic Elementary and Secondary School is in the Third Millennium*, 2005).

The essential elements of “an academically rigorous and doctrinally sound program” mandate curricular experiences—including co-curricular and extra-curricular activities— which are rigorous, relevant, research-based, and infused with Catholic faith and traditions. The following essential elements provide a framework for the design, implementation, and assessment of authentic academic excellence in Catholic school education from pre-kindergarten through secondary school.

Standard 7:

An excellent Catholic school has a clearly articulated rigorous curriculum aligned with relevant standards, 21st century skills, and Gospel values, implemented through effective instruction.

Benchmarks:

- 7.1 The curriculum adheres to appropriate, delineated standards, and is vertically aligned to ensure that every student successfully completes a rigorous and coherent sequence of academic courses based on the standards and rooted in Catholic values.
- 7.2 Standards are adopted across the curriculum, and include integration of the religious, spiritual, moral, and ethical dimensions of learning in all subjects.
- 7.3 Curriculum and instruction for 21st century learning provide students with the knowledge, understanding and skills to become creative, reflective, literate, critical, and moral evaluators, problem solvers, decision makers, and socially responsible global citizens.
- 7.4 Curriculum and instruction for 21st century learning prepares students to become expert users of technology, able to create, publish, and critique digital products that reflect their understanding of the content and their technological skills.
- 7.5 Classroom instruction is designed to intentionally address the affective dimensions of learning, such as intellectual and social dispositions, relationship building, and habits of mind.
- 7.6 Classroom instruction is designed to engage and motivate all students, addressing the diverse needs and capabilities of each student, and accommodating students with special needs as fully as possible.
- 7.7 Faculty collaborate in professional learning communities to develop, implement and continuously improve the effectiveness of the curriculum and instruction to result in high levels of student achievement.

- 7.8 The faculty and professional support staff meet (arch)diocesan, state, and/or national requirements for academic preparation and licensing to ensure their capacity to provide effective curriculum and instruction.
- 7.9 Faculty and professional support staff demonstrate and continuously improve knowledge and skills necessary for effective instruction, cultural sensitivity, and modeling of Gospel values.
- 7.10 Faculty and staff engage in high quality professional development, including religious formation, and are accountable for implementation that supports student learning.

Standard 8:

An excellent Catholic school uses school-wide assessment methods and practices to document student learning and program effectiveness, to make student performances transparent, and to inform the continuous review of curriculum and the improvement of instructional practices.

Benchmarks:

- 8.1 School-wide and student data generated by a variety of tools are used to monitor, review, and evaluate the curriculum and co-curricular programs; to plan for continued and sustained student growth; and to monitor and assess faculty performance.
- 8.2 School-wide and aggregated student data are normed to appropriate populations and are shared with all stakeholders.
- 8.3 Faculty use a variety of curriculum-based assessments aligned with learning outcomes and instructional practices to assess student learning, including formative, summative, authentic performance, and student self-assessment.
- 8.4 Criteria used to evaluate student work and the reporting mechanisms are valid, consistent, transparent, and justly administered.
- 8.5 Faculty collaborate in professional learning communities to monitor individual and class-wide student learning through methods such as common assessments and rubrics.

Standard 9:

An excellent Catholic school provides programs and services aligned with the mission to enrich the academic program and support the development of student and family life.

Benchmarks:

- 9.1 School-wide programs for parents/guardians provide opportunities for parents/guardians to partner with school leaders, faculty, and other parents to enhance the educational experiences for the school community.
- 9.2 Guidance services, wellness programs, behavior management programs, and ancillary services provide the necessary support for students to successfully complete the school program.
- 9.3 Co-curricular and extra-curricular activities provide opportunities outside the classroom for students to further identify and develop their gifts and talents and to enhance their creative, aesthetic, social/emotional, physical, and spiritual capabilities.

Operational Vitality: Standards and Benchmarks

Catholic schools are temporal organizations committed to the Church and the mission of Catholic education including a commitment to a culture of excellence and rigor. These schools exist in a milieu of constant socioeconomic challenges grounded in continuous need for: sustainable financial planning, human resource/personnel management and professional formation, facilities maintenance and enhancement, and the requirement for institutional advancement and contemporary communication. Catholic schools must adopt and maintain standards for operational vitality in these areas and define the norms and expectations for fundamental procedures to support and ensure viability and sustainability. When a school does not maintain standards for operational vitality, the continuation of academic excellence is in grave jeopardy. Over time, even an academically rigorous school with strong Catholic identity will not survive without operational vitality.

Standards for operational vitality must focus on the “operation” of the school—how it works and how it is supported --in four key areas: finances, human resources/personnel, facilities, and institutional advancement. The leader/leadership team must manage each area and be subject to the direct oversight of the governing body in these matters.

Standard 10:

An excellent Catholic school provides a feasible three to five year financial plan that includes both current and projected budgets and is the result of a collaborative process, emphasizing faithful stewardship.

Benchmarks:

- 10.1 The governing body and leader/leadership team engage in financial planning in collaboration with experts in non-profit management and funding.
- 10.2 Financial plans include agreed upon levels of financial investment determined by the partners involved who may include but are not limited to parishes, dioceses, religious orders, educational foundations, the larger Catholic community, and responsible boards.
- 10.3 Financial plans define revenue sources that include but are not limited to tuition, tuition assistance/scholarships, endowment funds, local and regional partnerships, public funding, regional cost sharing, (arch)diocesan and/or religious communities’ assistance, foundation gifts, entrepreneurial options and other sources not listed.
- 10.4 Financial plans include the delineation of costs for key target areas such as instruction, tuition assistance, administration, professional development, facilities, equipment, technology, program enhancement/expansion, capital projects and other planned projects .
- 10.5 Current and projected budgets include a statement of the actual and projected revenue sources, indicating an appropriate balance among revenue sources, and a statement of actual and projected expenditures including the actual cost per child, benchmarked compensation/salary scales, and other health benefits and retirement costs.

- 10.6 Financial plans include educational materials for distribution to all members of the community explaining the total cost per child and how that cost is met by identifying the percentage of cost that is paid for by tuition and the remaining amount of cost that is supported by other sources of revenue.
- 10.7 The governing body and leader/leadership team provide families access to information about tuition assistance and long-term planning for tuition and Catholic school expenses.
- 10.8 The governing body and leader/leadership team ensure that appropriately developed financial plans and budgets are implemented using current and effective business practices as a means of providing good stewardship of resources.

Standard 11:

An excellent Catholic school operates in accord with published human resource/personnel policies, developed in compliance with (arch)diocesan policies and/or religious congregation sponsorship policies, which affect all staff (clergy, religious women and men, laity and volunteers) and provide clarity for responsibilities, expectations and accountability.

Benchmarks:

- 11.1 Human resource programs are professionally staffed at the appropriate level (i.e central office, school office) and ensure full compliance with human resource policies.
- 11.2 Human resource policies delineate standards for position descriptions including staff responsibilities and qualifications, hiring, compensation, and benefits, as well as standards for professional development, accountability, succession planning and retirement.
- 11.3 Human resource policies ensure that competitive and just salaries, benefits, and professional growth opportunities are provided for all staff.
- 11.4 Human resource policies ensure that institutional planning includes investment in personnel growth, health care and retirement.

Standard 12:

An excellent Catholic school develops and maintains a facilities, equipment, and technology management plan designed to continuously support the implementation of the educational mission of the school.

Benchmarks:

- 12.1 The school's facilities, equipment, and technology management plan includes objectives to support the delivery of the educational program of the school and accessibility for all students.
- 12.2 The school's budget supports facilities, equipment, and technology management with specific funds for capital improvements, depreciation, and replacement.
- 12.3 The school's purchasing, and physical and technological improvements are by design, done in alignment with the mission and the school's planning and curricular goals, and consistent with environmental stewardship.

Standard 13:

An excellent Catholic school enacts a comprehensive plan for institutional advancement based on a compelling mission through communications, marketing, enrollment management, and development.

Benchmarks:

- 13.1 The communications/marketing plan requires school leader/leadership team and staff person(s) to insure the implementation of contemporary, multiple information technologies to reach targeted audiences, and to establish reliable and secure databases and accountability to stakeholders.
- 13.2 The enrollment management plan requires the governing body to review and the school leader/leadership team to supervise annual and continuous measurement and analysis of both enrollment and retention patterns for all student groups.
- 13.3 The development plan requires school leader/leadership team, in collaboration with the governing body, to insure that key strategies are in place to identify, grow and maintain significant funding prospects, including alumni(ae), over time and when appropriate.

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