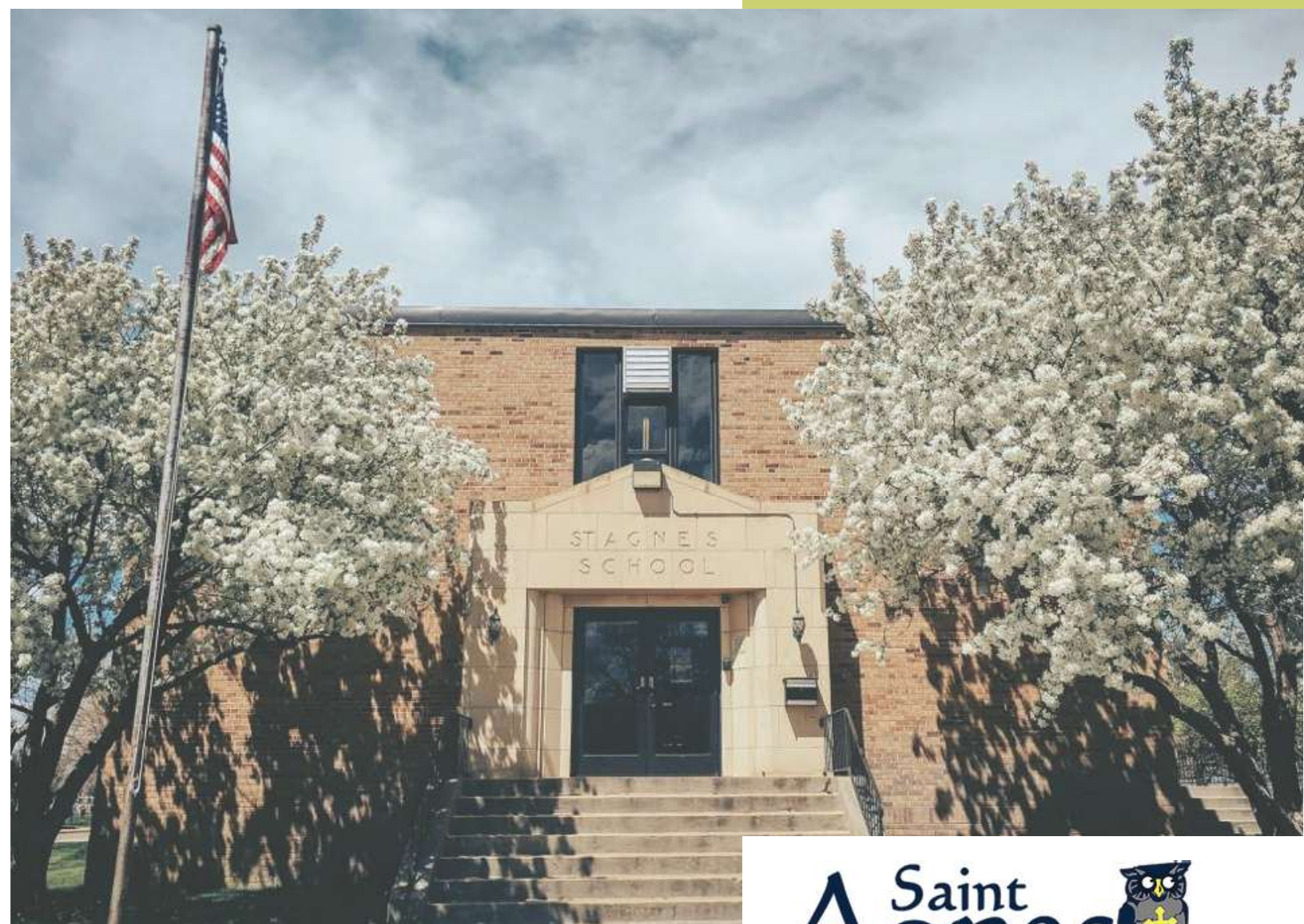


ST. AGNES CATHOLIC SCHOOL **STRATEGIC PLAN**

2025 - 2027



EXECUTIVE SUMMARY

On Saturday, March 29th, 2025, Members of the St. Agnes School Administration, Foundation Board, Staff, and Parish met with Jamie Weingart of JNW Consulting for a full-day strategic planning retreat. The day began with introductions and opening comments by Foundation Director Isabel Moreno and Administrator Julie Brown. The group then held a discussion regarding aspects of St. Agnes within the past few years that each participant was most proud of, as well as opportunities for future organizational improvement. This led to the introduction of expectations for the day, and the first group activity—a Visioning exercise—began.

The Visioning exercise was designed to help St. Agnes identify an ideal future state based on its highest level of impact, accomplishments, and culture. Insights from this activity can be found in the appendix of this report. This activity was followed by a current state discussion, in which team members worked in small groups to discuss organizational strengths, opportunities for improvement, aspirations for the future, and results-based outcomes to aim for over the next three to five years.

After a brief break, a facilitated discussion led to the identification of potential strategic priorities for St. Agnes over the next two to three years. The strategic priorities were established as follows:

1. Financial Stability and Security
2. Faith-Based Academic Excellence
3. Facility Upgrades and Maintenance
4. St Agnes Organizational Cohesiveness
5. Community Marketing, Outreach, and Visibility

Following the identification of strategic priorities, the team worked diligently to develop strategies that would support these priorities. From this body of work came 16 defining objectives for St. Agnes Leadership and Staff to focus on through 2027.

Following the Spring Retreat, members of the Planning Committee reconvened in May and July for additional planning work. This collaborative efforts resulted in the establishment of action Items, responsible parties, and timelines aimed to support the execution of the 16 defining objectives mentioned above. This full body of work can be found on pages 4-12 of this report.

JNW wishes to thank the Leadership and Staff of St. Agnes for your trust and willingness to engage in this Strategic Planning Process. We wish the St. Agnes Community great fulfillment and success as you 'Empower your students to lead with faith and excellence', through 2027 and beyond!



Jamie Weingart
Jamie Weingart
Principal Consultant
JNW Consulting



MISSION

St. Agnes School is committed to providing our students an opportunity for academic excellence in the Catholic tradition through a partnership with parents and the parish community. As a Catholic faith-centered community, we commit to help students develop their potential as conscious and responsible leaders, empowering them to live the Gospel values of love, peace, respect and service in their everyday lives.

VISION

Provide students at St. Agnes with a quality education, a place to learn about and serve the Lord, pleasant and up-to-date facilities, and a fun and safe recreational environment.

STRATEGIC PRIORITIES

1. Financial Stability and Security
2. Faith-Based Academic Excellence
3. Facility Upgrades and Maintenance
4. St Agnes Organizational Cohesiveness
5. Community Marketing, Outreach, and Visibility

STRATEGIC PLANNING ROSTER

Mandi Adams	Troy Herman	Elise Gurrola
Kristen Bauer	Teresa Johnson	Dave Schaff
Julie Brown	Father Rayappa Konka	Kristin Schiff
Redo Celli	Teri Ramirez	Mary Skiles
Tiann Colwell	Isabel Moreno	Brooke Talkington
Megan Dockery	John Navarro Songco	Jennifer Urdiales
Kristie Becker	Meghan Calvert	Terri Calvert

KEY DEFINITIONS

Strategic Plan

A Strategic Plan outlines the future direction of an organization. It identifies how an organization will allocate their resources to achieve a desired future state, while positioning itself to be competitive and sustainable.

Strategic Priority

Each Strategic Priority represents and details the organization's focused commitment in pursuing the organizational Mission, Vision, and Values. These priorities are conceptual targets that the organization must successfully hit in order for the plan to have served its purpose.

Measures of Success

Measures of Success, also known as Key Performance Indicators (KPIs), represent a quantifiable measure of performance over time for each strategic priority.

Defining Objective

Defining Objectives within this plan refers to the overarching goals through which each strategic priority will be addressed.

Action Items

Action Items within this plan refer to the specific steps for action required to execute on Defining Objectives. Defining Objectives will often consist of several action items related to specific, measurable, achievable results. Action items will also be tied to responsible parties, deadlines, and status updates.

Responsible Party

The Responsible Party within this Strategic Plan represents the person/organizational role responsible for the execution of each Action Item. In partnership with the CEO, the Responsible Party has the authority to add tactics that will support the action plan, as well as to select additional team members to execute on each item.

STRATEGIC PRIORITY #1

FINANCIAL STABILITY AND SECURITY

STRATEGY	ACTION ITEMS	RESPONSIBLE PARTIES	TIMELINE
1. Improve Income Generation	1. Grow Funding Streams - Estate Planning and Endowment Donations - education, seminars, brochures, website. Provide professional/estate planners to parish to educate on options - Consider varies levels of donations/Programming - Consider dedicated allocation options	Foundation, Troy Herman, Parish Resources, etc.	Plan in Place by October 1, 2025
	- Alumni Engagement - Include on Website - Newsletter - Programming	Foundation with Core Team: (Brooke Talkington, Mary Skiles)	Complete by October 1, 2025
	- Website Capabilities "How can i support?" - Alumni sign up - Testimonials and Thank You Messaging 'Donate Now' Button - Link to Payment Method - Build Foundation Website	Terri, Julie, Marketing, Teresa	Basic Foundation Website Live by October 1, 2025
	- Increase Grant Opportunities - Discovery Work - Set Grant Finance Goals - Consider Role Candidates, Discern paid vs. volunteer	Foundation	Discovery complete by: March 30, 2026; plan in place by: June 30, 2026
	2. Establish Corporate and Key-Role Donors - Establish relationships for professional services - Estate planners, trust advisors, financial advisors, CPAs - Service-Based Support* / In-Kind Donations - Identify Potential Partner Businesses - Local, Alumni, etc. - Identify Contribution Opportunities - Create Recognition Opportunities - Review/Reference Other Business-Partner Programs - Set Financial Goals	Foundation	Action Plan in place by July 1, 2026

STRATEGIC PRIORITY #1 (CONTINUED)

FINANCIAL STABILITY AND SECURITY

STRATEGY	ACTION ITEMS	RESPONSIBLE PARTIES	TIMELINE
2. Grow Fundraising/Community Events	1. Continue Premiere: • Increase directed, intentional donation opportunities • Ensure ‘thank-yous’ to donors, estates, honorariums. • Continue to tell the story about what money is used for. • Provide a feedback loop that creates “ownership” of the donation • Set an example for how to leave a legacy.	Foundation	Review Annually in January - Strategically Consider Changes and/or Alternative Major-Fundraiser Options
	2. Continue Penny Carnival	School Volunteer Group	Review Annually in April
	3. Continue 100 Club - sustain	School Volunteer Group	Review Annually in June; Sustainability Plan 2026
	4. Maximize Start Cards	School Volunteer Group	Review Annually in January
	5. Continue Fish Fry	School Volunteer Group	Review Annually
3. Create a Rolling Financial Plan	1. Include the following: • Expenditures • Curriculum • All Foreseeable Variables • Review fund-a-need documentation	Advisory Council, 100 Club, HSA, Finance Manager, Administration, Foundation	Quarterly Meeting: Beginning of Q1, Q2, Q3, and Q4

STRATEGIC PRIORITY #2

CATHOLIC-BASED ACADEMIC EXCELLENCE

STRATEGY	ACTION ITEMS	RESPONSIBLE PARTIES	TIMELINE
1. Provide Progressive Education	1. Invest in Technology Necessities, Upgrades, and Trainings	Administration, Bytes Managed IT, with School Staff	Rolling Process, Reviewed as Needed- Communicate with Foundation
	2. Provide regular and relevant Catholic formation and professional development - Gather Teacher Input - Increase Individualized PD Opportunities - Include Catholic Formation Component	Administration, School Staff, DRE	Discovery Complete by December 31, 2025 High-Level Plan for 2026-2027 School Year in Place by May 31, 2026
	3. Take Action to Increase Overall Academic Scores - Continue with new math curriculum - Honor suggested curriculum life cycles and plan proactively - review and utilize standardized testing data (place focus on areas for improvement) - provide professional development related to standardized testing (MAP,IXL)	Administration with School Staff	Ongoing, as needed Review Annually Review Annually
	5. Consistently Collect and Publish Current Student Academic Data Share student success through communication channels (website, alumni, newsletters, bulletins, advertising, Catholic Education)	Administration, Marketing, Family Outreach, Foundation	Marketing Communication Plan in Place by June 30, 2026 (See Strategic Priority #5)
2. Continue to Grow a Catholic identity	1. Enrich Families through Catholic Formation Opportunities - Continue to share 'good news' events (First-Communion, baptisms, etc.) - Offer More Family Based Formation Opportunities - Add one family-school formation opportunity per year	DRE, School Volunteer Group	Ongoing, as applicable Begin plan in January, 2026

STRATEGIC PRIORITY #2 (CONTINUED)

CATHOLIC-BASED ACADEMIC EXCELLENCE

STRATEGY	ACTION ITEMS	RESPONSIBLE PARTIES	TIMELINE
3. Retain Students (from Pre-k and beyond)	1. Offer Unique Pre-K Christian Experiences/Activities Introduce Pre-K Students/Families to Mass Experience	Pre-K, K, Administration	Communicate Earlier (Christmas, 2025)
	2. Create continuity from Pre-K - K "We're glad you're here...stay with us!" - Create excitement for programs through marketing		
	3. Highlight Financial Opportunities, Tax Credits, alternative incentive opportunities	Administration	Begin 2026
	4. Highlight student outcomes and Spanish education	Administration, Marketing	Ongoing, Market Through a Variety Communication Channels
	5. Create continuity messaging and partnerships between families and Administration: (i.e. buddy programs, pre-k touchpoints with Principal)	Administration and Staff	Ongoing, Review Annually
4. Retain Staff	1. Review and align wages with competitive standards as capable	Advisory Council with Administration, Foundation	Review Annually
	2. Improve Benefit Packages	Advisory Council with Administration, Foundation	Review Annually
	3. Prioritize and Highlight School Culture - Family Relationships - Administrative Support - Inclusive and Inviting Environment - Helpful, Collaborative Relationships - Work-Life Balance - Character-Building and Behavior Support - Mission and Ministry	Advisory Council with Administration, Foundation	Review Annually

STRATEGIC PRIORITY #3

FACILITY UPGRADES AND MAINTENANCE

STRATEGY	ACTION ITEMS	RESPONSIBLE PARTIES	TIMELINE
1. Create a Rolling Asset Management Plan	1. Prioritize Needs - Establish True Maintenance Committee - Seek Volunteers, within and outside school - Create a 'who to call' list	Advisory Council Administration, Revitalized Maintenance Committee and Committee Lead	Nominate and Select Committee Members by August, 2025
	Create a Communication Plan to Offer Transparency Regarding School Facility Issues	Maintenance Committee	Begin Quarterly Meetings by October 1, 2025
	2. Create Short-Term List Upgrade School Railings	Maintenance Committee	In-Place by December 31, 2025
	3. Assign Responsible Parties to Building Facility Issues	Maintenance Committee	In-Place by December 31, 2025
3. Plan for Long-Term Upgrades	1. Consider Bathroom Upgrades	Maintenance Committee	In Place by May, 2026
	2. Fund New Ceiling in Gym, Classrooms and Hallways	Maintenance Committee	In Place by May, 2026
	3. Plan for evolving ADA Accommodations	Maintenance Committee	In Place by May, 2026
	4. Upgrade basement windows	Maintenance Committee	In Place by May, 2026
	5. Prepare for Upgrading/Replacement of Plumbing System	Maintenance Committee	In Place by May, 2026
	6. Prepare for Roof Replacement	Maintenance Committee	In Place by May, 2026
	7. Establish an Infrastructure-Sinking Fund	Maintenance Committee	In Place by May, 2026
4. Prioritize and Plan for School Safety and Security	1. Review Doors/Glass/Cameras/etc. on an annual basis 2. Re-engage Safety Team 3. Attend Safety and Security Trainings 4. Complete Annual Local Education Training 5. Continue St. Agnes Safety Day 6. Continue Drills	Maintenance and Safety Committee	Review Annually, begin June 30, 2026

STRATEGIC PRIORITY #4

ST. AGNES ORGANIZATIONAL COHESIVENESS

STRATEGY	ACTION ITEMS	RESPONSIBLE PARTIES	TIMELINE
1. Unite School, Church, and Foundation Board Under One Vision	1. Create a plan to Increase Parish Support • Increase parishioner volunteer opportunities within school • Continue and expand school masses. • Establish school/parishioner pen pal program. • School sending cards to parishioners for holidays.	Administration, DRE, and Parish Council Rep, Pastor, Foundation, Other ("Liaison Team")	Establish Liaison Team by December 31, 2025
	2. Improve Communication Within All Areas • Establish annual finance meetings	"Liaison Team"	Begin, January 2026
	3. Increase Accountability Around Goals and Objectives • Designate one person for all parish/school accounting • Establish annual recap meeting. • Issue more frequent financial statements.	"Liaison Team"	Begin, January 2026
	4. Work Toward Team Cohesiveness • St. Agnes/parish social justice bulletin. • Develop roles and expectation statements for foundation members.	"Liaison Team"	Begin, January 2026
	5. Create a United Understanding of Each Facility/Organization's Financial Needs • Develop roles and expectation statements for foundation members.	"Liaison Team"	Begin, January 2026
2. Inspire Community Trust	1. Share Knowledge Across All Areas • Designate one person for all parish/school accounting • Establish annual recap meeting. • Issue more frequent financial statements. • Present Budget to Finance Team at Annual Meeting	Foundation Treasurer/Finance Lead: (Troy Herman?), Parish Finance Committee	Meet Annually, Beginning February, 2026

STRATEGIC PRIORITY #4 (CONTINUED)

ST. AGNES ORGANIZATIONAL COHESIVENESS

STRATEGY	ACTION ITEMS	RESPONSIBLE PARTIES	TIMELINE
3. Develop "Working" Advisory and Foundation Board	1. Create Action Plan based on School Strategic Plan	Foundation and Advisory Presidents	Presidents to meet by March 30, 2026
	2. Establish terms, bylaws for both Boards	Foundation and Advisory Presidents	In Place by June 30, 2026
	3. Assign levels of task/project to Board Members • Maintenance • Marketing (Foundation and Advisory) • Fundraising • Alumni, etc.	Foundation and Advisory Presidents	In Place by June 30, 2026

STRATEGIC PRIORITY #5

COMMUNITY MARKETING, OUTREACH, AND VISIBILITY

STRATEGY	ACTION ITEMS	RESPONSIBLE PARTIES	TIMELINES
1. Break the Barriers that Exist Between Parishes	1. Create a Presence in Neighboring Churches a. Establish a meeting including ALL parish priests, along with Julie Brown, and create a common objective highlighting the importance of Catholic education and faith within the community. i. Objective: Recognize that unity among parishes strengthens Catholic identity, reminding the faithful that we are part of something greater than our individual churches. Working together reflects the unity of the Body of Christ by instilling a Catholic foundation with education among our youth.	Administration	Initial Meeting by December 31, 2025
	2. Invite all parish priests to participate in school activities & weekday masses	Administration	Ongoing, Begin Immediately
	3. Increase Visibility through HSA Community Outreach	HSA	
	4. Increase communication and education for all Parishes: Support and communicate all-parish mass attendance (students do not have to attend this church to attend this school)	Marketing	Ongoing, Begin Immediately
	5. Seek Opportunities to Collaborate on Religious Education		Begin January, 2026
	6. Consider Opportunity to Bus Students	Advisory Council	Decide by October 31 st , 2025

STRATEGIC PRIORITY #5 (CONTINUED)

COMMUNITY MARKETING, OUTREACH, AND VISIBILITY

STRATEGY	ACTION ITEMS	RESPONSIBLE PARTIES	TIMELINES
2. Through Marketing, Promote and Engage the Community	1.Create a Marketing Budget and Plan Consider a. Market to the Entire Panhandle - Partner with DECA students for marketing ideas and promotion. This also helps create awareness with St. Agnes among the public schools. It also provides free marketing campaigns & ideas for the school. b. Target 'ideal' Audience - Retain preschool students (how does St. School set other preschools apart?) - Consider Catholic Demographics in the community - Promote the school's new Spanish curriculum to Our Lady of Guadalupe - Families who are looking for an enriching & faith-based education c. Create Marketing Measures of Success d. Utilize a Variety of Marketing Platforms. - Services & Activities: Singspirations performances, school council activities e. Share student success through communication channels (website, alumni, newsletters, bulletins, advertising, Catholic Education) f. Develop Foundation Newsletter	Marketing and Administration	Plan Complete by December 31 st , 2025
3. Highlight Our Quality Education**	1. Track and Share/Highlight Outcomes - Current students, middle school/ HS Alumni, Graduated Alumni - Honor rolls, sports, awards, etc. - Create an Alumni Outreach: - Social Media pages - creates communication & updates among Alumni - provides invitations to events & the premiere - Invite Alumni for a Mass & School tour during high school reunions	Administration and Marketing Foundation	Marketing Communication Plan in Place by June 30, 2026 Plan in Place by June 30, 2026
	2. Refine Mission and Vision Statement - School - Foundation - HSA	Administration with Advisory / Board Reps	Review at Strategic Planning Retreat - Summer, 2027

CONSULTANT OBSERVATIONS

On March 29th, 2025, St. Agnes Catholic School hosted a Strategic Planning Retreat, bringing together leaders, staff, parents, and key stakeholders to collaboratively shape the organization's future. In this unique situation, I am serving as an outside consultant, as well as offering an internal perspective through my position as the St. Agnes Foundation Board Secretary.

It is my observation that the St. Agnes Organization is strong, committed to meaningful and impactful teacher and student outcomes, and deeply passionate about ensuring the long-term success of St. Agnes. A central theme that emerged throughout this Retreat was the need to enhance St. Agnes' financial sustainability. It appeared that the participants felt the school was currently in a survival phase, and there was strong consensus that implementing strategic financial initiatives would be critical to fostering long-term stability and growth. Participants recognized that achieving this goal would create a stronger foundation for students, families, and staff to thrive.

An additional key opportunity identified involved strengthening organizational cohesiveness across the entire St. Agnes community. This collective focus aims to include parishioners, clergy, board members, school leadership, staff, parents, and the broader Catholic and Christian communities. Retreat discussions emphasized that achieving this unity will depend on enhanced communication throughout St. Agnes' boards and committees, building a culture of mutual trust and support, and driving an organizational commitment to developing one Living Strategic Action Plan that aligns all efforts under a common Vision and Mission.

As a final reflective thought, all participants demonstrated a deep sense of responsibility and dedication to making St. Agnes the best it can be. The group's willingness to engage in constructive dialogue and solution-focused discussions was inspiring and uplifting. A strong collective hope was evident that, with sustained focus and strategic execution, St. Agnes could reach a future point at which financial concerns, staffing challenges, and enrollment pressures no longer weighed upon the organization's core mission.

In summary, the retreat seemed highly productive, forward-thinking, and collaborative. The energy and engagement of the participants reflected their commitment to shaping a bright future for St. Agnes Catholic Schools. It was an honor to facilitate this important work, and we look forward to supporting and celebrating the success of St. Agnes for years to come.

Best Regards,
Jamie Weingart

RECOMMENDATIONS AND TIMELINES

To ensure the timely completion of this plan, it is recommended that the St. Agnes Strategic Planning Committee reconvene in Spring of 2025. The purpose of this second session would be as follows:

1. Review and Revise all Strategic Priorities and Defining Objectives
2. Create a High-Level Strategic Action Plan
3. Develop Organizational Accountability through the Development of Responsible Parties, Committee Leads, and Timelines
4. Determine Measure of Success that Will Provide the Committee and the St. Agnes Community with Measurable Results Related to Strategy Execution.

A Suggested Timeline is as follows:

May, 2025	• Committee gather for a second session to work through plan revisions and edits • Final Revisions made by JNW team
Summer, 2025	• Collaborative Meeting with All Involved Stakeholders to Discuss Action Steps and Further-Clarify Responsible Parties
Fall, 2025	• Prepare Communication Plan • Strategic Plan Launch • Engage St. Agnes Staff in Action Planning
Sept 2025 - May 2026	• Committee-Based Action Planning • Consultant-Led Departmental Goal-Setting Sessions, as Necessary
May, 2026	• Strategic Planning Committee Reconvene to Review Progress Made on Living Plan, Celebrate Success and Review Measurable Outcomes, and Refine Strategic Action Plan

TIMELINES AND STATUS UPDATES (CONTINUED)

The following language may offer value and clarity as the organization measures progress on each future action item:

Status	Description
Hold	No Action Being Taken During This Quarter
In Development	The Development of Action Items & Tactics are in Progress
Discover, Research, and Recommend	Discovery Work and Research are in Progress, Implementation Pending
Implementation	Action Items and Tactics are Being Implemented by Responsible Parties
Sustain and Monitor	Defining Objectives, Action Items, and Tactics are Executed. *This Phase May Require Additional Monitoring to Measure Success and Effectiveness
Complete	Defining Objectives, Action Items, and Tactics are Fully Operationalized within the School District
KPIs Met	The Action Plan is in Progress or Completion, and Measures of Success identified within the original Strategic Plan have been fully realized.

A Potential Revised Strategy Table or Dashboard May Look Similar to the Following:

Strategic Priority #1								
Measures of Success:								
	Action Item	Responsible Party Leader	Responsible Party Members	Deadline	Status 2025-2026	Status 2026-2027	Status 2027-2028	Status 2028-2029
Defining Objective #1								
Defining Objective #2								