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# School of St. Mary Strategic Plan: 2026-2029

May 20, 2026

# What is A Strategic Plan?

A **strategic plan** is a structured roadmap that defines an organization's long-term direction, priorities, and actions to achieve its goals.

It answers:

- Where do we want to go?
- How will we get there?



# Development Process

- Conducted SAC brainstorm in June 2025
- Asked previous SAC leads for strategic plan examples and insights
- Reviewed strategic plans from similar Catholic schools
- Audited brainstorm notes and 2025-2026 Committee goals
- Reviewed draft with Father Ted, Kathy, and Maria
- Sought feedback from staff and families via anonymous surveys
- Refined plan during February 2026 SAC work session, including Father Ted, Father Andre, Kathy, and Maria
- Presented final plan to staff during May 1 in-service meeting, as well as in meetings with Father Ted, Father Andre, Kathy, and Maria





# Staff Survey Results

18 respondents



## How would you define success? (open)

- Recognition as a **vibrant community** that inspires students' faith formation, academic excellence, and social/emotional wellness
- Strong, visionary leadership
- Rigorous academic expectations and achievement to ensure students are prepared for the future
- Increased enrollment through 8<sup>th</sup> grade
- Strong parish partnership
- Strategic marketing and enrollment growth plan
- Staff retention



## What are 3 keys to achieving this success? (open)

- Strong, visionary leadership team
  - Full-time leader in each building
- Consistent, clear expectations of leaders, staff, students, and parents
- Improved accountability of leaders, staff, students, and parents
- More instruction time for core curriculum
- Stronger teacher support, starting with quality hiring and including ongoing collaborative development
- Strategic planning that includes staff input



Which areas need the most attention/focus to best support students' academic success, faith formation, and overall well-being? (choose 3)

1. Student behavior and discipline systems
2. Curriculum and instructional resources
3. Emotional and mental health supports
4. Accountability in school leadership and decision-making



# Parent Survey Results

37 respondents




# How would you define success? (open)

- Excellent education, continuous improvement in test scores
- Full capacity at every grade, including significant UGC growth
- Happy, qualified teachers who want to stay at SOSM
- Transparent, accountable communications systems
- Improved PGC-UGC integration
- More engaged parent community within the parish, school volunteerism, and social activities
- Thriving sports and extracurriculars
- Trusted relationships with administration (parish and school)
- Stronger discipline protocols
- Improved facilities



Which areas need the greatest focus to best support students' academic growth, faith formation, and overall well-being?

1. Curriculum and instructional resources
2. Student behavior and discipline systems
3. Family engagement and communications
4. Accountability in school leadership and decision-making



If the school could make one meaningful improvement in the next three years, where would you most want to see resources (time, funding, leadership focus) invested — and why?

1. Prioritize teacher satisfaction, retention, recruitment, and development
2. Fill staffing gaps (e.g., Dean of Students, admin in each building, SRO)
3. Commit to open communication and financial transparency
4. Enhance fundraising strategies, including new endowment
5. Improve curriculum and facilities

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# Cross-Cutting Themes

- Growing and thriving **community**
- Academic excellence, supported by strong curriculum, qualified & happy teachers, and safe, enhanced learning environments
- Strategic and transparent communications
- Accountability among all of us



# Mission, Vision, and Values

**Mission:** The School of St. Mary nurtures the spiritual, intellectual, physical, and emotional growth of every child. We inspire academic excellence and guide students to live with faith, purpose, integrity, and respect for others -- now and throughout their lives.

**Vision:** Rooted in faith, the School of St. Mary delivers an exceptional Catholic education that empowers students to develop their God-given talents and reach their fullest potential.

**Values:** We **learn** with purpose, **serve** with joy, and **lead** with integrity.



# In 3 years, SOSM will ...

Engage students and their families in a shared journey of life-long faith formation.

Consistently exceed standardized test goals.

Retain talented and satisfied staff who are committed to Catholic education.

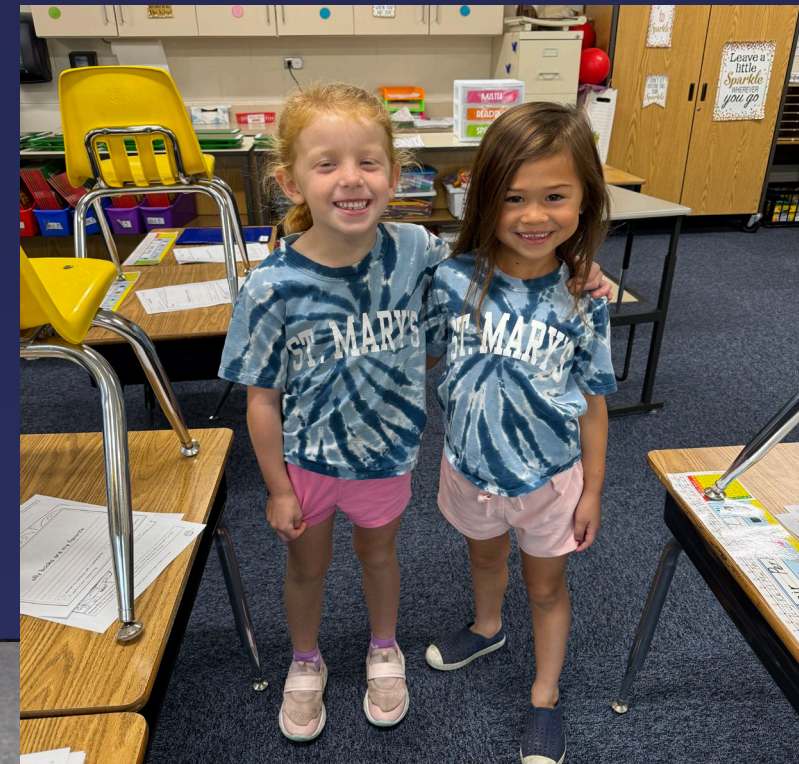
Support more than 500 students.

Manage a dedicated School Endowment Fund of at least \$30 million.

Maintain world-class facilities that foster a safe, innovative learning and extracurricular experience.

Fulfill this plan, supported by the Pastor, Principal, and leadership team, who actively follow it and build upon it as they work with parish leaders, teachers, staff, and parent volunteers to be accountable to strategic goals.

**The School of St. Mary will be a premier Catholic school in the Archdiocese, recognized for excellence in faith, academics, and community.**



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# Strategic Plan Goals



Catholic Identity and Faith Formation



Whole Child Academic Excellence and Social-Emotional Wellness



Financial Management and Growth



Marketing and Enrollment



Safety and Facilities





# Strategic Plan Goals



## **Catholic Identity and Faith Formation**

Form hearts and minds in the spirit of Mary to follow Jesus with faith, wisdom, and compassion, by supporting a community that is activated by Gospel values, enlivened by meaningful experiences of Catholic faith and tradition, and committed to servant leadership.



## **Whole Child Academic Excellence and Social-Emotional Wellness**

Offer a top-tier Catholic education and positive learning environment by thoughtfully designing a rigorous and proactive approach that celebrates the diverse needs of students.



## **Financial Management and Growth**

Ensure financial stability by focusing on growing enrollment, inspiring philanthropy, and managing fiscal responsibility.



# Strategic Plan Goals



## **Marketing and Enrollment**

Grow school enrollment by fostering strong connections with the community and positioning our school as a desired destination for students, families, and educators.



## **Safety and Facilities**

Continually update and maintain world-class safety and security measures across PGC and UGC campuses, prioritizing the well-being of our students, faculty, and staff, while also fostering a culture of innovation that supports faith-based education goals.





# Catholic Identity and Faith Formation

Form hearts and minds in the spirit of Mary to follow Jesus with faith, wisdom, and compassion, by supporting a community that is activated by Gospel values, enlivened by meaningful experiences of Catholic faith and tradition, and committed to servant leadership.





# Catholic Identity and Faith Formation: Actions

- Ensure **curriculum enhances faith** development beyond the sacramental years.
- Create **intentional events**, such as family-led masses, that bring parents and children together, helping to build a **deeper family dynamic** rooted in faith, love, and **shared experience**.
- Integrate the **celebration of Marian feasts and virtues** (humility, joy, courage, and compassion) in existing and future activities.
- Identify opportunities to engage SOSM students in **parish-led service projects and masses** beyond traditional roles.
- Strengthen the **partnership between the parish and school** through shared prayer, mission, and community life.





# Whole Child Academic Excellence and Social-Emotional Wellness

Offer a top-tier Catholic education and positive learning environment by thoughtfully designing a rigorous and proactive approach that celebrates the diverse needs of students.





# Whole Child Academic Excellence and Social-Emotional Wellness: Actions

- Implement a regular schedule for the **data-driven review and revisions of all curricula**, across core subjects as well as STEAM, music, art, and physical education.
- Ensure staff **capabilities and specialties align with students' needs and curricula**, including plans for proactive staff recruitment and retention, as well as ongoing training and development for new and existing staff.
- Employ an **integrated system to track student progress and provide timely and transparent reports** to parents (beyond conferences and report cards).
- Retain **qualified teachers and staff with a plan** that addresses their needs for **growth, development, and competitive compensation**.
- **Celebrate teachers and staff as they achieve school and personal milestones** and implement tactics that honor and communicate these highlights to improve awareness of their commitment to a **Catholic education vocation**.





# Whole Child Academic Excellence and Social-Emotional Wellness: Actions

- Create a **clear path for honoring students' academic achievements and faith formation** at all key grade levels, inspiring them to achieve excellence throughout their time at SOSM.
- Prioritize **resources for supporting students' emotional wellness**, including identification of needs for additional staff and facilities across both campuses and all grades.
- Implement a **plan for consistent, clear discipline protocols** that support focused classroom environments that prioritize learning for both teachers and students, including dedicated staff to implement these tactics.
- Prioritize **extracurricular activities and events that foster inclusiveness and relationship-building** within the school and the Lake Forest community among students across all grades.
- Utilize alumni data to **demonstrate SOSM academic excellence in action**, to inspire current students and recruit new families.

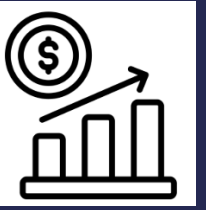




# Financial Management and Growth

Ensure financial stability by focusing on growing enrollment, inspiring philanthropy, and managing fiscal responsibility.





# Financial Management and Growth: Actions

- Continually **audit costs** and identify opportunities to ensure expenses support strategic priorities.
- Ensure **annual school budgeting and budget tracking are managed by the Principal and Vice Principal** with input from the Pastor, School Advisory Council (SAC), and Parish Finance Council.
- Support **enhanced transparency with families about financial health sustainability and needs** of the school through ongoing communication, SAC newsletters, Parish Annual Report, and a new Annual State of the School Overview.
- Ensure **families have a clear understanding of tuition, fees, and fundraising** needs and expectations.
- Clearly **outline scholarship opportunities and criteria**, to help support all families interested in Catholic education.





# Financial Management and Growth: Actions

- Build the **SOSM School Endowment Fund** that is overseen by school and SAC leaders, to help ensure unrestricted funds are strategically invested and targeted for school priorities, to help maintain tuition at modest annual increases – aiming to grow the Fund to \$30 million in 3 years.
- Support the **Parents Association Crusader Annual Fund** in its efforts to contribute to operating costs, staff bonuses, financial aid, and school resources.
- Implement a **strategy to identify, recognize, and regularly communicate with school donors**, including alumni engagement, local business outreach, and corporate matching with annual goals and proactive engagement led by school staff and supported by parent volunteers.
- Track **progress against Strategic Plan goals and priority actions**, including biannual updates shared with staff, parents, and parishioners.





# Marketing and Enrollment

Grow school enrollment by fostering strong connections with the community and positioning our school as a desired destination for students, families, and educators.





# Marketing and Enrollment: Actions

- Establish a **streamlined and transparent admission and enrollment process** that simplifies procedures and enhances the experience for prospective and returning families, including an ongoing survey mechanism to solicit feedback from new and existing families.
- Aim to **steadily increase enrollment, ultimately rebuilding to 500 students by 2030-31**, with annual metrics tied to staff leadership roles.
- **Retain students – particularly at key grade level transitions** (e.g., PreK to Kindergarten, 3<sup>rd</sup>-5<sup>th</sup>, middle school) – by seeking ways to define and amplify the middle school experience, as well as by demonstrating the value of a faith-based education.
- Enhance **Preschool, aiming for improved retention** into middle school.
- Create a **robust athletic and extracurricular program** that is managed by dedicated staff and supported by family volunteers.





# Marketing and Enrollment: Actions

- Create and implement an **annual strategic communications plan** including milestones for **regular, quality engagement** with staff, parents, and parishioners, and protocols for principal-level parent engagement.
- Strengthen **school-parent partnerships through easy-to-access and responsive communications channels** – with school senior leadership and teachers – as well as community-building events.
- Seek **recognition that credibly validates school, staff, and alumni excellence.**
- Implement **activities that engage community businesses and families** to showcase the school, inspiring interest in enrollment and engagement.
- Employ **strategies that proactively and regularly engage with school alumni**, to highlight their successes and seek their support in school growth.





# Safety and Facilities

Continually update and maintain world-class safety and security measures across PGC and UGC campuses, prioritizing the well-being of our students, faculty, and staff, while also fostering a culture of innovation that supports faith-based education goals.





# Safety and Facilities

- Ensure all **security and communications needs** (e.g., staff, equipment, protocols) are **fully operational and exceed basic needs**.
- Ensure **classrooms**, as well as athletic spaces and equipment, playgrounds, libraries and **all shared spaces**, **support a safe and effective learning and extracurricular environment**.
- Create and implement a **long-term technology plan** – **led by a full-time, on-site technology director** and informed by a comprehensive assessment to identify and address areas of security (including cybersecurity) and technology vulnerability and improvement.
- Identify opportunities to **enhance learning environments and resources as curriculum needs evolve**.





# Strategic Plan Goals



Catholic Identity and Faith Formation



Whole Child Academic Excellence and Social-Emotional Wellness



Financial Management and Growth



Marketing and Enrollment



Safety and Facilities



# Next Steps

- Unveil plan:
  - May 20 SAC meeting
  - MySOSM
  - School and parish websites
  - Parish communications
- Streamline actions for 2026-27 and subsequent school years
- Develop plans for ensuring accountability of achieving strategic plan goals -- among school leaders and staff, as well as SAC members
  - Updated SAC meeting approach and template to tracking progress





# Discussion



**Thank You!**