

**GUIDELINES FOR THE PROCESS TO CONSIDER
ALTERNATIVE STRUCTURES FOR THE PARISH ELEMENTARY SCHOOL**

It is the hope of the Church of Philadelphia that every parish has its own school and that every parent wishing to send a child to a Catholic school will be able to do so (see for example canons 528, 798, 800). At certain points in the life of a parish, the pastor and parishioners may discover that there are reasons to engage in a dialogue to consider the current structure of the elementary school(s) in a parish or parishes within a geographic area. This dialogue may begin as a result of the parish or cluster pastoral planning process, an annual review of the parish plan or the regular review of the *Standards for Quality Catholic Elementary Schools within the Archdiocese of Philadelphia* (Appendix G of the Parish Elementary School Policies and Procedures 2000). This document is intended to assist the pastor and parishioners to engage in such a dialogue.

The pastor(s) review(s) appropriate data with the following groups within the individual parishes: a) Parish Pastoral Council, b) Parish Finance Council, c) school principal, d) parishioners and e) Home and School Association. (*Refer to Addendum HA*) Following these consultations, the pastor(s) must write to the Regional Vicar and request permission of the Archbishop to begin a formal study of their current or prospective parish elementary school to determine possible options for the future.

- A. After permission has been granted for the study to begin, the pastor(s) are to send a letter to the Secretary for Catholic Education, the Major Superior(s), if applicable, Vicar for Religious, if applicable, and the Pastors' Committee of the Personal Parishes, if applicable, informing them that a study is being initiated and to invite the religious communities to participate in the study. The pastor(s) forms a School Study committee to assist him in conducting the study. This committee should consist of representatives of the Parish Council, Finance Council, Home and School Association, the principal, and any other appropriate parish committees.
- B. Copies of all reports and letters that are generated during this process are to be sent to the Regional Vicar. The study of a parish elementary school(s) should be conducted by assessing the parish school or the prospective school in light of the *Standards for Quality Catholic Elementary Schools within the Archdiocese of Philadelphia* (*Refer to the Four Stage Process for a Formal Study of Parish Elementary School(s) in Addendum HB*). Once data has been collected by the individual School Study Committee(s), the Regional Vicar convenes a meeting of a Steering Committee composed of each pastor, his respective elementary school principal, and another member of the School Study Committee (as designated by the pastor) to deliberate on the outcomes of the study. This Steering Committee is convened monthly by the Regional Vicar until recommendations are reached.

- C. In addition to the major findings of the study (*Refer to Addendum HB*), the following issues should be addressed as part of the study:
1. Identification of how the religious education of the children of the parish will be provided
 2. Results of consultations regarding elementary education options with the following groups:
 - all parishioners
 - parents who currently have children enrolled in the parish school
 - parishioners who have elementary age children not attending parish elementary school
 - parishioners with pre-school age children
 3. Results of consultations with the principal and faculty of the existing school(s) regarding elementary education options
 4. Assessment of the buildings by an advisory committee of professional experts representing Capital Projects, pastor(s), principal(s), and contractors designated by the pastor(s) as to conditions of the building(s), availability of classrooms, and the ability of facilities to house projected number of students
 5. Enrollment Projections (*Refer to Addendum HA*)
 6. Results of consultations with the Major Superior(s), if applicable
 7. Report(s) of Pastors' Committee(s) of Personal Parishes, if applicable
 8. Recommendation of the individual parish School Study Committee(s)
 9. Report and recommendation of the Steering Committee when more than one parish is involved
 10. Report, observations/comments of other affected parishes
 11. Recommendation by the Cluster Implementation Committee

- D. When the study of the parish schools has been completed, the Regional Vicar sends the reports to the Secretary for Catholic Education and the Secretary for Temporal Services for their review and recommendations.
- E. When the Regional Vicar receives responses from the Secretaries for Catholic Education and Temporal Services, the Regional Vicar forwards all documentation including his recommendation to the Vicar for Administration.
- F. After reviewing all the reports submitted by the Regional Vicar, the Vicar for Administration provides the Archbishop with the following information:
1. The complete report of the Regional Vicar
 2. The recommendations of the Vicar for Administration
 3. An implementation date for closing a parish school(s), opening a regional parish school, or beginning formal gathering of data to build a school
- G. The Archbishop reviews all of the reports and makes a determination about the future of the parish school(s).
- H. The Vicar for Administration informs the Regional Vicar in writing about the decision that has been made.
- I. The Regional Vicar informs the pastor(s) in writing that a decision has been made. Copies of the Regional Vicar's communication are sent to the Secretary for Catholic Education, the Secretary for External Affairs, and the Secretary for Temporal Services, the Director of Communications, and the Director of the Office for Public Affairs.
- J. The *Communications Plan: Announcing Alternative Structures for the Parish Elementary School* is to be followed in communicating the decision to the parishioners and community at large. (Refer to Addendum HC)

This process will normally result in major findings recommended by the Steering Committee or in the case of a single parish, the School Study Committee to:

- ▶ **form a Regional Parish School**
- ▶ **to close a Parish School,**
- ▶ **to pursue Building a Parish School,**
- ▶ **to retain the same structure of the existing parish school.**

IMPLEMENTATION

Following the specific decision of the Archbishop and the notification to the pastor, the implementation phase takes place. Please refer to the appropriate implementation section of this process.

Regional Parish School

A regional parish school is defined as a parish school sponsored by two or more parishes within a cluster or geographic area. Since a decision by the Archbishop approving the formation of a regional parish school is usually made in January of a given school year, the following issues, actions, and decisions would be addressed and implemented between January and June of the same school year so that the new regional parish school would be ready to open for the following school year.

- A. The staff of the Office of Catholic Education assists the pastors in the selection of the principal, vice-principal (if applicable), and teaching staff of the regional parish school. (*Refer to the Parish Elementary School Policies and Procedures for outline of the protocol.*)
- B. The pastors of the parishes of the regional parish school should come to an agreement on the amounts to be subsidized by the parishes. A signed agreement by all pastors representing the parishes involved in the regional parish school should be designed at the end of the planning process. Prior to the signing of this agreement, it is to be reviewed by the Regional Vicar. The agreement should include a description of the responsibilities of each pastor and parish involved in the regional parish school. This agreement shall be reviewed every three years. In all cases, the total subsidy shall be equal to the operational costs of the school less the amount provided by tuition and fees. Parish Financial Services should be requested to help the pastors with this aspect of the planning.
- C. Once permission for a regional parish school is announced, consideration should be given to retaining the services of someone with educational experience to assist in the re-organization process. The Office of Catholic Education could assist the pastors in the selection of such a person. This position is meant to be temporary and part time. The job description should include the following:
 - To establish a time line for staff meetings of all pastors/principals
 - To chair staff meetings with pastors and principals with minutes
 - To communicate information to all members of the community via memos, newsletters, phone calls etc.

- To assist in registration procedures
 - To contact the Director of Government Programs and Marketing in the Office of Catholic Education to initiate new marketing efforts
 - To develop a process that will assist the pastors in the selection of a new name for the regional school
 - To lead the discussion on possible change of the school uniforms
 - To assist the principals in establishing a time line for the merging of materials and programs
 - To communicate with the Director of Government Programs and Marketing in the Office of Catholic Education regarding the possibility of additional funds for educational materials
- D. The staff of the Office of Catholic Education assists the pastors and principals in developing a recruitment plan for the school. The goal of the recruitment plan should be the placement of 100% of the affected students. Specific information about the availability of seats and the projected tuition charges should also be made available as soon as possible. (*Refer to Addendum HD*)
- E. The staff of the Office of Catholic Education assists pastors in the selection of a school name.
- F. The pastor who is responsible for the finances of the regional parish school is to bill the other pastor(s) on a monthly basis or a quarterly basis in accordance with the agreement that was established at the time of the consolidation.
- G. Parents of non-Catholic students are responsible for at least 75% of the per pupil operational costs at the regional parish school; however, efforts should be made to charge the parents of non-Catholic students 100% of the total cost per pupil.
- H. When a re-organization of schools takes place, the Permanent Record Cards, the medical records and the bound books of students' roll slips are to be kept in the new school. Inactive Permanent Record Cards are to be kept for seven years while the roll slips are to be preserved in perpetuity. The medical records are kept in the school until the students graduate or transfer from the regional parish school.

These records are to follow the student wherever the student subsequently enrolls. If a child chooses not to enroll in the regional parish school, the Permanent Record

Card and roll slips are to be kept in the regional parish school; however, the medical records are to be released to the school in which the student is going to enroll. If a student transfers to another parish elementary school, the Permanent Record Card is forwarded to the new school. Psychological records cannot be transferred to a new school without the permission of the Intermediate Unit and/or the parent/guardian.

- I. Books and materials that are the property of the government are placed in the regional parish school.
- J. The personnel records for teachers who continue to teach in the regional parish school are to be kept at the regional parish school. The personnel records for teachers who transfer to another parish elementary school within the Archdiocese of Philadelphia are to be forwarded to that school. The personnel records of teachers who do not continue teaching in a parish elementary school of the Archdiocese of Philadelphia are to be forwarded to the Office of Catholic Education. Inactive files of former teachers in the schools that are part of a re-organized school should also be forwarded to the Office of Catholic Education.
- K. As the school year comes to an end, it is recommended that the individual parish/school community gather as a Catholic community of faith to acknowledge and to give thanks within the context of a Eucharistic celebration for the gift that the school has been to so many and for the ministry of the many principals and teachers who have served the parish. At the same time, an opportunity should be planned with the parishes to acknowledge the birth of a new regional school about to take place, asking God's blessings on this new venture within Catholic Education.
- L. The principals involved in the re-organization process are encouraged to create opportunities for the faculty and students to meet and interact prior to the opening of the new regional parish school. It is imperative that steps be taken to foster a strong faith community among students, faculty, and parents/guardians.

Closing a Parish School

When an individual parish is unable to directly sponsor and operate its own parish school, a recommendation may be made to close the school. The parish school will then cease to exist. Since a decision by the Archbishop approving the closure of a parish school is usually made in January of a given school year, the following issues, actions, and decisions would be addressed and implemented between January and June of the same school year so that the parents and the parish have ample time to prepare for the transfer of their children into other parish schools for the following school year.

- A. The staff of the Office of Catholic Education assists the pastor in facilitating the process of closing the parish school.
- B. The staff of the Office of Catholic Education assists the pastor and principal in developing a recruitment plan for the transfer of students to the "receiving parish school(s)." The goal of the recruitment plan should be the placement of 100% of the affected students in these parish elementary schools.
- C. The pastor of the "sending parish school" is responsible for the parish subsidy portion for all of his participating parishioners in the neighboring parish elementary schools. The pastors of the "receiving parish school(s)" will invoice the pastor of the "sending parish school" either monthly or quarterly in accord with the agreement that was established among the pastors.
- D. Parents of non-Catholic students are responsible for at least 75% of the per pupil operational costs at a parish elementary school; however, efforts should be made to charge the parents of non-Catholic students 100% of the total cost per pupil.
- E. When a school closure takes place, the Permanent Record Cards and the medical records are forwarded to the receiving schools. All bound books of students' roll slips and inactive Permanent Record Cards are to be kept at the rectory. The Permanent Record Cards are to be kept for seven years while the bound roll slips are to be preserved in perpetuity. The medical records are kept in the receiving school until the student graduates or transfers from the school. These records are to follow the student wherever the student subsequently enrolls.

- F. Books and materials that are the property of the government are given to the “receiving parish school(s).” The Director of Government Programs and Marketing will facilitate between the principal and the Intermediate Unit in the dissemination of materials to the receiving schools.
- G. The personnel records for teachers who transfer to another parish elementary school within the Archdiocese of Philadelphia are to be sent to that school. The personnel records of teachers who do not continue teaching in a parish elementary school of the Archdiocese of Philadelphia are to be sent to the Office of Catholic Education. Inactive files of former teachers in the school should also be sent to the Office of Catholic Education
- H. As the school year comes to an end, it is recommended that the parish/school community gather as a Catholic community of faith to acknowledge and give thanks within the context of a Eucharistic celebration for the gift of this school to the community. As a community of faith we also acknowledge the ministry of the many principals and teachers who served in the particular parish school.

Building a New Parish School

When in response to the report developed to consider alternative structures for the parish elementary school(s), permission is granted by the Archbishop to pursue building a school, the following activities are undertaken to support the "Request for Formal Approval to Build" a parish school or a regional parish school consistent with the *Policies, Procedures, and Guidelines for Parochial Capital Projects*.

- A. The pastor consults with Parish Financial Services to determine:
1. the financial history of the parish for the past three years
 2. if the financial resources of the parish are sufficient to construct a school
 3. the ability of the parish to maintain an appropriate school subsidy
 4. the financial feasibility of the parish to
 - a. purchase an existing building* or
 - b. renovate an existing building* or
 - c. construct an entirely new school building - or
 - d. construct a school with one of each grade with projections for further expansion
 5. the actual cost of operating a parish elementary school based upon financial reports of comparable parish schools

* in the case of purchasing or renovating an existing building, it is recommended that the Pastor contact the Office of Catholic Education, before any action is taken, to determine whether the existing facility will serve the educational needs of the students and that it meets all code requirements

N.B. There may be the availability of tax-free loans from commercial banks for construction of a school. Such loans must be approved by the Secretary for Temporal Services. The Pastor is encouraged to discuss this matter, early in the process, with Parish Financial Services.

- B. The Pastor contracts with an independent research firm to conduct a Feasibility Study to determine:
1. the percentage of parishioners in favor of or opposed to the establishment/

P/P

construction of a new parish elementary school

Policy No.: Appendix H

Date: May 2003

Page: 11 of 12

2. the willingness and ability of parishioners to contribute to a capital campaign to fund the capital project
 3. the willingness and ability of parishioners to contribute to the ongoing financial support of a school
 4. the existing parish programs that may be impacted by the diversion of funds
 5. the projected number of families/children who would register in the school
- C. The Pastor may wish to contact the Vicar for Religious to determine the availability and willingness of a Religious Community to staff the new school.
- D. The Pastor establishes parish committees to address the various aspects of this project. The list of committees should include:
1. Building Committee
 - a. Pastor and committee members should become familiar with the *Policies, Procedures and Guidelines for Parochial Capital Projects*
 - b. Pastor contacts Archdiocesan Building Committee for consultation on the selection of an architect
 - c. Pastor interviews several architects and determines their fees
 - d. Pastor and Committee members may visit sites of recent buildings and/or additions
 - e. Pastor and Committee members may invite parishioners with commercial building expertise to facilitate communications
 - f. Pastor and Committee members are to establish a time-line for building
 2. Fund Raising Committee
 - a. Pastor appoints a group of parishioners to assist him in working with a professional Capital Campaign Fund-Raising Company
 3. Committee to work with the Office of Catholic Education

This Committee is responsible for reviewing the various aspects of a parish school in order to assess whether a new parish school would be capable

of fulfilling its mission and could be sustained given the resources of the parish.
The

P/P

Policy No.: Appendix H

Date: May 2003

Page: 12 of 12

Pastor should arrange for him and his Committee to meet with appropriate personnel from the Office of Catholic Education in order to discuss the Standards for Quality Catholic Education and archdiocesan guidelines for parish elementary schools. (*Refer to Appendix G: Standards for Quality Catholic Education, Parish Elementary Schools Policies and Procedures, Early Childhood Guidelines, Personnel Handbook for Parish Elementary School Lay Teachers 1997, and Personnel Handbook for Parish Lay Principals and Directors of Religious Education 1997*)

4. Committee for Development and Recruitment

It is the Pastor's responsibility to contact the following archdiocesan Offices:

- a. The Director of Government-Funded Programs and Marketing from the Office of Catholic Education - for assistance in developing appropriate goals and strategies for the promotion of the school
- b. The Office for Development
- c. The Office for Communications

5. Additional committees as needed

E. Requests for Formal Approval to Build

1. For details concerning the process for approval, the Pastor should refer to the *Policies, Procedures and Guidelines for Parochial Capital Projects*.
 - a. To purchase an existing building, renovate an existing building or construct a new school building, the Pastor is to write a letter to the Vicar for Administration requesting approval. This request will require review by and the recommendation of the College of Consultors as well as the approval of the Archbishop.
 - b. To initiate a Capital Campaign, the Pastor is to write a letter to the Vicar for Administration requesting approval to initiate the Campaign.

