Preparing your Campus Facilities for 2021-2022 and Beyond.

10 Lessons to Heed in Achieving School Financial Sustainability

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Learning Outcomes:

- Understanding of the lessons learned from 20 years of assisting Catholic Schools with the development of their facilities
- Understanding of the two key factors required in achieving financial sustainability
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A Cohesive Team...Dedicated to You!
### #1 Holy Boldness Advances Catholic Education

- Good Reputation
- Great Educational Program
- Comprehensive development /advancement program
- Appropriate Enrollment
- 21st Century Facilities
- Healthy Endowment

- Leadership moving forward with Holy Boldness!
#2 Your Facilities are Their First Impression
Facilities are key decision-making factors
Student Engagement Requires **Healthy Buildings**

What is a healthy building?
Classroom Design Factors that Drive Student Engagement

- Color: 23%
- Complexity: 28%
- Ownership: 23%
- Flexibility: 28%
- Light: 49%
- Temperature: 49%
- Air Quality: 49%
Nine Foundations of Healthy Buildings
#4 Safety & Security are Still First
What is **Safety**?

- Visibility
- Transparency
- Connectedness
- *(Social Emotional)*
- Welcoming
- School Attachment
- *(Pride of Ownership)*
- Feeling/Perception of Safety
- Trust/Agency
- Daylight

What is **Security**?

- Single Point of Entry
- Policies
- Practices
- Window Coverings
- No Vision Zone Demarcation
- Layers of Access Control
- CCTV
- Audio Notification/Communication
- Panic Buttons

**BOTH**

- Training
- Administrative Presence
- *(Foster Relationships)*
- Wayfinding
- Defined Private/ Public Areas

SAFETY

SECURITY
SAFETY STRATEGIES
- Daylight
- Social Emotional Connectedness
- Transparency
- School Attachment (Pride of Ownership)
- Trust/Agency (Student Commons)

DESIGN CONSIDERATIONS
- Bright/Open/Airy
- Student Focused
- Connected to Natural Environment
- Multiple Scales of Furniture & Seating Options

SECURITY STRATEGIES
- Access Control
- Layers of Access
- CCTV
- Audio Notification/Communication
Understanding the perception of safety
#5 Learning and Space Must be Linked

Learning zones designed to support the type of learning experiences:

- Culture
- Communicate
- Collaborate
- Create
- Connect
- Critical Thinking
The school building has been called “The Third Teacher”

1. Parents (Community)
2. Teachers
3. School Building
The Egg-Crate Culture

Hallway
Band-Aid Tactics Don’t Equal **Sustainability**

- Conduct Minor Facility Upgrades (cosmetic)
- Increase Tuition
- Conducting More Minimal Fund-Raising Efforts
- Expand Grade Level Offerings
- Enhance Science and STEM Labs
- Create T.E.A.L. (Technology Enabled Active Learning) Programs
- Add International Students
- Implement International Baccalaureate Programs
Annual U.S. Public School Spending on Facilities

New Construction /Capital Development: $49 Billion

Maintenance & Operations: $50 Billion

U.S. News 2018 Report:
Move from here

... to here

Life has changed. Schools must change.

Style Comfort Technology
Safety Fuel Economy
Lowering Tuition Can Increase Enrollment

What is the Mission of the Catholic Schools?
“Do not be discouraged by the difficulties that the educational challenge presents!”

Pope Francis
Vatican News – June 25, 2018

By using endowment funds gained via the Master Planning Process
There is always Money

Percent of Americans who identify as Catholic

US Population:
1965 = 190M
2017 = 325M
Your Alums ARE Wealthy
### Your Potential

<table>
<thead>
<tr>
<th></th>
<th>Elementary</th>
<th>High School</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year Opened</td>
<td>1965</td>
<td>1965</td>
</tr>
<tr>
<td>Grads Per Year</td>
<td>27</td>
<td>118</td>
</tr>
<tr>
<td>Total Alumni</td>
<td>1,458</td>
<td>6,372</td>
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</table>
# Average Elementary

<table>
<thead>
<tr>
<th>Wealth Bracket</th>
<th>Min. Net Worth</th>
<th># of Alumni</th>
<th>Total Wealth</th>
<th>1% Donation</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 - 5.01%</td>
<td>$1,182,390</td>
<td>75</td>
<td>$88,679,250</td>
<td>$886,793</td>
</tr>
<tr>
<td>5 - 1.01%</td>
<td>$2,377,985</td>
<td>75</td>
<td>$178,348,875</td>
<td>$1,783,489</td>
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<td>1 - 0.51%</td>
<td>$10,374,030</td>
<td>9</td>
<td>$93,366,270</td>
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<td>0.5 - 0.11%</td>
<td>$16,115,373</td>
<td>8</td>
<td>$128,922,984</td>
<td>$1,289,230</td>
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<tr>
<td>0.1% (or Wealthier)</td>
<td>$43,090,281</td>
<td>2</td>
<td>$86,180,562</td>
<td>$861,806</td>
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<td></td>
<td>169</td>
<td>$575,497,941</td>
<td>$5,754,979</td>
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</tbody>
</table>

1% donation from top 10% of Alums (169) = **$5,754,979**
## Average High School

<table>
<thead>
<tr>
<th>Wealth Bracket</th>
<th>Min. Net Worth</th>
<th># of Alumni</th>
<th>Total Wealth</th>
<th>1% Donation</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 - 5.01%</td>
<td>$1,182,390</td>
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<td>$391,971,090</td>
<td>$3,913,711</td>
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<tr>
<td>5 - 1.01%</td>
<td>$2,377,985</td>
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<td>$787,113,035</td>
<td>$7,871,130</td>
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<tr>
<td>1 - 0.51%</td>
<td>$10,374,030</td>
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<td>$404,587,170</td>
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<td>0.5 - 0.11%</td>
<td>$16,115,373</td>
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<td>$628,499,547</td>
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<td>$43,090,281</td>
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<td>$387,812,529</td>
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</tbody>
</table>

Total: $2,599,983,371

1% donation from top 10% of Alums (749) = $25,993,833
The Master Planning Process

Paves the Way for Progress and Sustainability

Vision Driven Actions, Not Actions Due to Limitations
Why Is the Master Planning Process Important?

- Incorporates Donors in the Visioning Process
- Creates a Unified Vision
- Provides Clear Communication, Understanding and Agreement
- Directs Maintenance, Repair, and Renovation Requirements
- Determines Achievable Financial Support
- Defines Path Forward to Implement Vision
Engaging your Community
Case Study
Manchester, CT
Case Study
Dickinson, ND
1. Move forward with **Holy Boldness**!
2. Your **Facilities** are Their First Impression
3. Facilities Must Be **Healthy**
4. Safety and Security are Still First
5. Learning and **Space** Must Be **Linked**
6. Band-Aid Tactics Don’t Equal **Sustainability**
7. Lowering **Tuition** Can Increase **Enrollment**
8. There Is Always **Money**
9. The **Master Planning Process** Paves the Way for Sustainability and **Fulfillment of the Mission**
10 Lessons to Heed in Achieving School Financial Sustainability

1. Holy Boldness Advances Catholic Education
2. Your Facilities are Their First Impression
3. Student Engagement Requires Healthy Buildings
4. Safety and Security are Still First
5. Learning and Space Must Be Linked
6. Band-Aid Tactics Don’t Equal Sustainability
7. Lowering Tuition Can Increase Enrollment
8. There Is Always Money
9. The Master Planning Process Paves the Way for the Mission
10. Our Recommendation: Focus on 1 & 9 and 2-8 will solve themselves
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