



Benilde-St. Margaret's

STRATEGIC PLAN 2025

RICH
HISTORY.
RADIANT
FUTURE.





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Dear Benilde-St. Margaret's Families and Friends,

Successful people, organizations and schools regularly take time to envision, plan and adapt for the future. In fact, in an era of rapid change, organizations resist change at their own peril. Every healthy and vibrant organization - school, business, or non-profit - must look to the future and answer the question: What must I do differently in the future to sustain the level of excellence for which we are known today?

Benilde-St. Margaret's (BSM) Catholic mission in education is forever linked to the identity of the Sisters of St. Joseph, the Christian Brothers, and the Order of Saint Benedict. Each approached education as a way to grow closer to God and shape the world, and that shared mission has lived on strongly through time. However, our world is not static, and change and complexity are normal descriptors that need to be acknowledged through education, calling BSM to build upon its foundation and evolve.

Our school enjoys a reputation of excellence in education as a Catholic college preparatory school with a rigorous and holistic approach. Yet, we cannot afford to become complacent. Learning today requires a base of knowledge rooted in academic disciplines along with critical skills that will apply across settings and endure over time. It requires a foundation of faith and the constant application of ethics and values. Learning requires deeply engaging multiple perspectives in pursuit of true understanding. It requires opportunities for exploration, for one to find purpose. As Pope Francis said, "we need to give a soul to the global world through an intellectual and moral formation."

To that end, BSM engaged a representative group of stakeholders as a Strategic Planning Team, charged with envisioning our future. An audit and professional assessment conducted by Meitler Group engaged students, faculty, staff, alumni, religious and business leaders, along with others from our community. Through those channels, we built an understanding of the current educational environment, identified our strengths, and articulated our opportunities for growth. This document represents a well-researched and collaborative discovery of our community's aspirations.

Rich History. Radiant Future outlines a vision forward for Benilde-St. Margaret's built upon four core pillars - Exceptional Academics, Being Catholic in the World, Vibrant Community, and Investing in the Future. We start from a position of strength and embrace our profound responsibility to impact not only the lives of our students and alumni, but the millions of lives Red Knights will collectively impact over the course of time. The importance of Catholic education is more significant today than in any previous time and we are ready for that challenge.

Sincerely,



Adam Ehrmantraut, Ed.D.
President



Benilde-St. Margaret's

A Catholic, college preparatory school, grades 7-12

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952-927-4176

President | Adam Ehrmantraut, Ed.D.
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The BSM crest:
Veritas: Truth
Pietas: Holiness, Dutiful Conduct
Scientia: Knowledge
Crown: St. Margaret's
Knight: Benilde, 3 Benedictine Crosses

MISSION AND LEGACY

Mission

Benilde-St. Margaret's is a dynamic Catholic learning community that partners with parents/guardians to develop the student's highest potential in body, spirit and mind. We offer a challenging college preparatory curriculum and a uniquely caring experience that includes faith formation, academic rigor, social responsibility, and extensive extracurricular activities. We educate servant leaders for a global society.

Living Our Legacy

Rooted in the vibrant and Catholic traditions of the Sisters of St. Joseph of Carondelet, the Christian Brothers, and the Order of St. Benedict, we've been uniquely blessed with three charisms that guide how we teach, act and treat one another at BSM. We lead by example, living out our mission each day with joyful hearts while embracing the lessons entrusted to our school by the Sisters and Brothers who have come before us. Grounded in our heritage, our community is uniquely positioned to educate and support all Red Knights and their families through service learning, strong academics, an array of co-curricular opportunities and the chance to make a difference in the world.



OUR VALUES

Our values are inspired by our founders:
Sisters of St. Joseph, the Christian Brothers,
and the Order of Saint Benedict.

God's Presence

- We believe in the living presence of God in our students, our community and our world.
- We believe each student is created in the image of God, capable of learning and, if guided through quality instruction, capable of great achievements.

Balance

- We believe in finding balance in work, prayer, and leisure.
- We believe that faith permeates life, gives meaning to learning, and both are life-long processes.

Community

- We celebrate diversity and welcome all members of our community.
- We believe that teachers, staff, coaches, and parents share in the responsibility to provide quality instruction, model conscientious behavior, and assist students in learning to make good decisions based on Christian values.

Respect for Others

- We honor and respect the dignity of all individuals.
- We believe that diversity and multicultural education are essential as we prepare students to live and work in an ever-evolving, complex society.

Excellence

- We educate students not only to contribute to society, but also to transform it; to use their knowledge and talents to critically examine and engage the world inspired by the message of the Gospel.
- We believe that the whole person is integral to learning. We attend to the intellectual, physical, emotional, interpersonal, and spiritual well-being of each student and provide a safe and enriching environment to foster creativity.





"You can do more with the
grace of God than you think."

—St. John Baptist de La Salle

PILLARS, STRATEGIC DIRECTIONS, INITIATIVES

There are four pillars of our Strategic Plan, and each aligns with the NCEA National Standards for Excellence in Catholic Education. The strategic direction and rationale provide the “what” and the “why” for each pillar, and should guide the continual improvement of all areas of our school. All students, faculty and staff should readily see themselves and their work as contributing to one or more of the pillars and strategic directions.

There were also areas that, during our extensive research and engagement with key stakeholders, called for revision or improvement. After careful analysis and thoughtful consideration, specific initiatives will be prioritized over the next five years. For each initiative, action plans include researching/assessment, planning a framework, and designing a system of measurement or evaluation. These initiatives will require collaboration, focused attention and resources to boldly move BSM toward fulfilling its mission.

BSM enjoys a reputation of excellence in education as a college preparatory school with a rigorous academic program. We are known and respected for providing a personal experience that includes faith formation, academic rigor, social responsibility, and extensive co-curricular activities.

It is with a deep sense of pride that we’ve sent thousands of graduates out into the world, who are now thriving in a variety of vocations, pursuing their passions, succeeding in college and leaving a positive impact on the world. We value our strong ties to our alumni and their continued commitment to our school and one another.

Yet, we cannot afford to become complacent. Change is key to remaining relevant and to achieving our vision. Our Catholic school, like those across the globe, has been empowered to look to the future and reawaken Catholic education within the reality of our world today. Our complex global challenges need the intellectual and moral leadership our Catholic education provides.



"Education needs to help our youth discover their passions and purpose in life, develop the critical skills needed to be successful in pursuing their goals, be inspired on a daily basis to do their very best, and be active and informed citizens."

— Tony Wagner, *Most Likely to Succeed: Preparing Our Kids for the Innovation Era*

PILLAR 1

EXCEPTIONAL ACADEMICS

Strategic Direction

Benilde-St. Margaret's college preparatory learning – rooted in the development of body, spirit, and mind – blends core knowledge and enduring skills with innovative learning experiences equipping each scholar to shape the world.

Rationale

We are living in a period of profound change, uncertainty, rapid technological advance, globalization, economic disparity and social injustice. The world will demand much of our graduates, and the challenges our students will face as adults are unprecedented. The shifting nature of society demands a base of core knowledge accompanied by valuable skills that endure over time. Our students need to understand that deep learning is a life-long pursuit that requires engagement in a range of dynamic, innovative contexts, engaging multiple perspectives in pursuit of true understanding. The challenges ahead will require a foundation of faith and the constant application of ethics and values.

As a college preparatory learning community, our identity is defined by a holistic educational approach, which must continue. We must also recognize the competitive educational landscape in the Twin Cities and the multitude of choices families have for secondary education. According to the College Board, there has been a 70% increase over ten years in the number of public high school graduates who have taken an AP Exam sometime in high school. The research is clear that students

who complete AP courses are more likely to thrive in college. Exposure to AP curriculum has also shown to increase ACT scores. Advanced standing gained following success on AP exams allows students to engage more quickly in a major area of study or double major at most universities. However, AP is not the only pathway to college credit. Many Catholic schools around the country are developing articulation agreements with colleges and universities for dual credit programs. There is a desire among BSM stakeholders for our graduates to have access to more opportunities to earn college credits through the academic program.

Rapid advances in research and the complexity of society have affected every academic area. It is simply not possible for one expert teacher to master the latest discoveries in their field. What we ask of teachers today has changed. They are no longer the “sage on the stage” but now must be a guide or coach, facilitating varied experiential learning opportunities for students. Technology tools have increased efficiency, but as we look to increasing expectations, our teachers will require professional development, curriculum writing and interdisciplinary collaboration to adapt instructional approaches.

INITIATIVE 1

Ensure innovative and authentic learning experiences for each student's academic journey.

- 1.1 Research innovative programs throughout the United States that provide authentic learning experiences and integrate core knowledge into real-world situations.
- 1.2 Create experiences throughout grades 7-12 that provide opportunities for each student to apply learning in real-world context.
- 1.3 Develop online learning experiences, aligned with expectations in colleges and universities.
- 1.4 Research, design and integrate high school internship and mentorship programs into the curriculum.
- 1.5 Differentiate and market BSM's innovative learning experiences as part of the academic program.
- 1.6 Develop a system for each student to reflect and document authentic experiences throughout their BSM education.

INITIATIVE 2

Ensure effective instructional approaches promote enduring skills – creativity, critical thinking, communication and collaboration.

- 2.1 Conduct an audit of existing classroom experiences that promote enduring skills.
- 2.2 Develop a graduate profile framework, a philosophical direction and expected academic outcomes for BSM students.
- 2.3 Embrace traditional academic knowledge and its intersection with broader enduring skills – critical thinking, collaboration, communication and creativity – throughout the academic program.
- 2.4 Ensure implementation and support for teaching enduring skills is part of all staff supervision procedures and clearly delineated in teacher expectations and evaluation tools.
- 2.5 Construct an aligned multi-year professional development plan to support faculty growth and proficiency in teaching the enduring skills – critical thinking, collaboration, communication, and creativity.
- 2.6 Develop an academic performance dashboard that includes measures of enduring skills – critical thinking, collaboration, communication and creativity.

INITIATIVE 3

Expand opportunities to earn college credit throughout the academic program.

- 3.1 Conduct a curricular audit to determine opportunities for students to earn college credit.
- 3.2 Introduce new AP courses based on the curricular audit and full academic program.
- 3.3 Audit current AP teaching and learning activities and align subject-specific items based on AP and ACT college readiness data.
- 3.4 Establish measurements and standards for each academic discipline related to AP and ACT scores.
- 3.5 Emphasize junior high preparation for rigorous academic courses, such as AP. Ensure high expectations, study skills, critical thinking and analytical skills have an early foundation.
- 3.6 Introduce dual credit courses at the high school level by collaborating with a nationally recognized college or university.





"Eyes open to the world, ears attentive and spirit alert, with sleeves rolled up for ministry in a continual joy of spirit."

— *From the tradition of the Sisters of St. Joseph*

PILLAR 2

BEING CATHOLIC IN THE WORLD

Strategic Direction

Benilde-St. Margaret's embraces its role as a part of the Catholic community accompanying students in developing their personal faith while actively leading them to live and serve according to their values.

Rationale

In one of the Catholic Church's foundational documents, *The Church in the Modern World*, the church is revealed as "a visible association and a spiritual community," renewed in Jesus Christ and transformed into God's family. Benilde-St. Margaret's has lived in that light as a spiritual community shaping the lives of our students. In an increasingly complex world where incredible challenges are presented daily, we hope to inspire in our students an understanding of the powerful role faith can have in their lives. Faith can offer moments of deep introspection but should also call one outside of oneself in order to make meaningful change, always interpreting the signs of the times in light of the Gospel.

Expressing our Catholic identity in a meaningful way, so that we clearly communicate it to all —while also welcoming and respecting other faith traditions — is an important initiative in our plan. It is critical that all faculty and staff believe in our mission serving as important teachers, mentors, and guides to our young people. Therefore, it is imperative that our school provides teaching and reflective opportunities for all faculty and staff members to build deeper understanding of the Catholic faith and their own spiritual life, equipping each to accompany our students on their faith journey.

Grounded in the Catholic traditions of The Sisters of St. Joseph of Carondelet, the Christian Brothers, and the Order of St. Benedict, we've been uniquely blessed with three charisms that guide how we

teach, act and treat one another at BSM and beyond. Each day, we carry out the lessons instilled by the Sisters and Brothers who have come before us, strengthening our foundation as an educational institution and a community of faith.

The relationship between schools and parishes is important to building a Catholic community of faith committed to bringing about good in this world. By collaborating with other Catholic organizations, we extend our reach in the community and multiply the impact of our efforts. For our students, collaboration ensures their school life and parish life are more closely aligned. For our community, collaboration means a strong Catholic voice and opportunity to spread and share the values of the Gospel.

True faith, rooted in our Catholic Tradition and the Gospel, requires action. We are called to serve boldly in the world. Service and social ministry are strong components of our student experience at BSM, but our research identified a need to review the structural framework for campus ministry and to better integrate service experiences and Catholic Social Teaching. Theology, Campus Ministry and Service Learning, the three components of faith formation of BSM, should be seamlessly integrated. With that goal in mind we will be best equipped to offer our students an experience of faith and God that inspires hearts and minds.

INITIATIVE 1

Strengthen Catholic identity to enrich spiritual experiences for students, parents, faculty, staff, alumni and friends.

- 1.1 Collaborate with local parishes' youth ministers and pastors to strengthen Catholic youth experiences, such as Mass, World Youth Day, common community service projects, and other archdiocesan youth activities.
- 1.2 Integrate the specific charisms of the Sisters of St. Joseph, the Christian Brothers and the Benedictines to further the vision and culture of BSM, and develop a teaching model for intentionally integrating them into life and learning at BSM.
- 1.3 Provide diverse opportunities for various stakeholders to share and deepen their faith: invitations to school Masses, prayer and mini-retreats, service activities, evening of reflection.
- 1.4 Initiate a faith-based retreat program for the 8th and 10th grades to provide balance with the Youth Frontiers program.
- 1.5 Create a "bridge" program to help non-Catholic students, families, faculty, and staff understand Catholic culture, traditions and values, while respecting their faith traditions.
- 1.6 Provide consistent formation opportunities for all faculty and staff to ensure the charisms and a Catholic world view are presented throughout the curriculum and co-curricular activities.
- 1.7 Include in new employee orientation deep learning of the BSM mission, charisms, religious heritage, along with each employee's role and responsibility for living and witnessing that tradition.
- 1.8 Review the roles and responsibilities of the current campus ministry program and staff to provide for more defined leadership in planning and decision-making.

INITIATIVE 2

Solidify the connection between service experiences and Catholic Social Teaching.

- 2.1 Review current student service opportunities and articulate their grounding in Catholic values.
- 2.2 Redesign the service program to provide a six-year progressively developmental experience grounded in specific Catholic social teaching.
- 2.3 Develop a method for each student to capture their service experiences throughout their education.
- 2.4 Create a senior-year capstone summary, reflecting on service experiences, learnings, personal growth, and faith impact.
- 2.5 Recognize, publicize and celebrate service experiences and outstanding individual or group impacts.
- 2.6 Consistently incorporate professional development opportunities for faculty rooted in service-learning pedagogy.
- 2.7 Institutionalize reflection as an essential component of the service and service-learning program.

INITIATIVE 3

Enrich the theology curriculum, focusing on student engagement and grounded in the USCCB framework.

- 3.1 Actively involve the chaplain, members of our founding orders, theology faculty, Campus Ministry team and administrators in regularly assessing the content, scope and sequence of the Theology curriculum.
- 3.2 Expand classroom activities that apply Catholic principles to everyday life.
- 3.3 Assess student engagement and effectiveness in growing personal faith to inform instruction and programming.
- 3.4 Provide professional development focused on engagement pedagogy with theology teachers.



"In community, we work out our connectedness to God, to one another, and to ourselves. It is in community that we find out who we really are."

— Sister Joan Chittister, Order of St. Benedict

PILLAR 3

VIBRANT COMMUNITY

Strategic Direction

Benilde-St. Margaret's is a diverse and vibrant community fostering long-term personal and professional connections throughout the world.

Rationale

Our identity as a Catholic school, rooted in the values of the Sisters of St. Joseph, the Christian Brothers, and the Order of St. Benedict, embraces the individual without distinction. Our reputation among parents, students and elementary school principals is positive and strong. The school's sense of community is bolstered by what most consider being the "right size," the strong academic program with appropriate personal attention for students, the numerous opportunities to participate in co-curricular activities. All of these efforts support a sense of belonging that positively affects students, faculty and staff members well-being and academic accomplishments. It is important that we maintain our reputation as a welcoming, values-based school community to maintain our consistently stable environment and vision for being a school of choice.

The multicultural and global world our students will live and work in demands people appreciate the value of varied perspectives and their inherent human dignity. Minnesota's ever-present opportunity and prosperity gaps call upon all educators, and especially our Catholic schools, to intentionally increase access to our educational program for students who have financial barriers.

Our strategic plan seeks to sustain a student body that reflects the racial, economic and academic diversity of the communities we serve.

Communities are an important part of an individual's identity. We will work to ensure that BSM students, parents, faculty, staff, alumni and friends see our community as integral to their identity. We know that communities today are associations that provide a range of value in the world across varied contexts throughout time. For our alumni, faith, career networking and philanthropic interests can call them back to the school that provided them the personal care, faith and academic foundation that made them who they are today.

"To whom much is given, much is expected" is a common phrase derived from the Gospel of Luke, "For unto whomsoever much is given, of him shall be much required," (Luke 12:48) We believe our alumni give much of themselves, and our advancement team is eager to develop new programs that help our alumni advance in their career, grow in their faith and service and reconnect with the Benilde-St. Margaret's family.

INITIATIVE 1

Sustain a fully enrolled student body that reflects racial, economic and academic diversity.

- 1.1 Create a five-year enrollment management plan, with a focus on enrolling a student body that is representative of the demographics of the Benilde-St. Margaret's attendance area.
- 1.2 Build strong relationships with Directors of Religious Education (DREs) to empower them as ambassadors of BSM's educational excellence and Catholic identity for student and parents in parishes.
- 1.3 Develop and promote academic and co-curricular competitions (with financial incentives) for elementary and middle school students designed to boost enrollment in line with highly desired student profiles.
- 1.4 Develop another partner school relationship to continue diversifying BSM's student body.
- 1.5 Revise tuition assistance policies and procedures to be more strategically, intentionally focus allocations on specific student needs, and diversify the student body.
- 1.6 Improve effectiveness of Parent Ambassador Program with targeted messaging and strengthening parish affiliation.
- 1.7 Investigate the feasibility of an early-admissions program for students enrolled in K-8 Catholic elementary schools.
- 1.8 Improve faculty and staff recruiting efforts to support diversity, reflecting the student body.

INITIATIVE 2

Enhance alumni engagement with professional connections and a philanthropic focus.

- 2.1 Survey alumni regularly to inform effective engagement strategies.
- 2.2 Re-initiate an alumni association with a focus on peer networking and engagement with the Advancement Office.
- 2.3 Research best practices in supporting alumni career advancement, and create a plan that connects BSM alumni to professional mentorship, internships and job opportunities.
- 2.4 Engage alumni as a student resource through the Guidance Office (school events, career days, mentoring, internships, etc.)
- 2.5 Engage alumni donors as ambassadors to educate students and recent graduates on the importance of philanthropy and their role in supporting BSM over the long-term.
- 2.6 Establish a “President’s Alumni Group” to serve as a vehicle for major gift cultivation, identification and solicitation among other graduates.

INITIATIVE 3

Enhance the sense of belonging among students, faculty, and staff.

- 3.1 Develop an advisory program in grades 7-12 with specific outcomes per grade level.
- 3.2 Revise student orientation and mentorship programs.
- 3.3 Facilitate fall activity participation for all new students.
- 3.4 Build avenues for dialogue between school leadership and faculty and staff.
- 3.5 Build opportunities for project-based leadership among faculty and staff.
- 3.6 Consistently integrate professional development opportunities focusing on culture and equity.



Remember the past with gratitude. Live the present with enthusiasm. Look forward to the future with confidence.

—*St. John Paul II*

PILLAR 4

INVESTING IN THE FUTURE

Strategic Direction

Benilde-St. Margaret's governance, leadership, financial position and facilities ensure long-term sustainability and accessibility.

Rationale

As outlined in the National Standards for Catholic Education, the success of our school and our 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."

Organizations that thrive over time require the systemic advancement of leadership. Succession planning requires years of career development, and when career development occurs within the organization, the culture of the organization can be sustained with less disruption as leadership changes over time. Engaging multiple stakeholders in collaborative planning efforts ensures the legacy of the organization lasts beyond any one person or governance board.

Operational sustainability requires careful planning and access to a range of resources. To ensure the long-term sustainability of BSM—one that will make our alumni proud—operational vitality relies on systemic financial, facilities, development, and enrollment planning.

INITIATIVE 1

Implement financial planning processes that ensure long-term stability.

- 1.1 Shift finance planning from a one-year to a five-year ongoing cycle, in line with strategic plan.
- 1.2 Revisit the financial performance dashboard and align it with the strategic plan to ensure long-term stability.
- 1.3 Draft a multi-year facilities master plan to provide cost estimates and timelines for anticipated upgrades, renovations or expansion.
- 1.4 Integrate technology initiatives and infrastructure in the facilities master plan.



INITIATIVE 2

Build development revenue through the endowment, annual giving, major gifts, planned-giving and capital campaigns.

- 2.1 Shift advancement planning from one-year to five-year goals that align with strategic and financial plans.
- 2.2 Share the vision and strategic plan initiatives with BSM's constituencies and potential donors to establish the need for increased financial support.
- 2.3 Increase unrestricted revenue by 15% by 2023-24, designating the annual fund as the primary focus for development efforts through 2024.
- 2.4 Evaluate all special events and fundraising activities annually to determine return on investment (i.e., time, resources, energy expended relative to revenue and/or participation and support).
- 2.5 Increase alumni participation in the Annual Fund from 6.6% to 10% by 2024.
- 2.6 Identify five to ten priorities for the President's relational visits/meetings each month to inspire donors to higher levels or secure lead donors for a major gift.
- 2.7 Train and engage the Board of Directors and Advancement Committee members in the identification, cultivation and solicitation of major donors.
- 2.8 Develop a multi-year schedule of small and large campaigns to implement the initiatives and action steps of the strategic plan starting with a campaign planning study in 2021 or 2022.
- 2.9 Research and create a planned giving strategy.
- 2.10 Increase endowment gifts and pledges by \$4 million by 2029.
- 2.11 Promote the endowment fund in school publications to increase understanding and contributions.

INITIATIVE 3

Enhance board governance and school leadership continuity over time.

- 3.1 Develop a leadership succession plan for the school's administrative positions focusing on the intentional development of potential leaders from within the faculty and staff.
- 3.2 Provide annual in-service opportunities for Board of Directors and its committees members to ensure an understanding of their role and responsibilities.
- 3.3 Define processes regarding working committee membership and terms.

FINANCIAL IMPLICATIONS

FINANCIAL OVERVIEW

Benilde-St. Margaret's is engaging the *Rich History. Radiant Future.* strategic plan from a position of financial strength and stability. In the past year, the school's assets have grown in an important way acquiring the land from the Archdiocese on which the school sits, bringing long-term security and financial savings. The most substantial liability related to building improvements from the early 2000's continues to shrink.

Over the past two years, the enrollment trends at BSM have been quite encouraging, despite the challenges many Catholic schools are facing in the Twin Cities. During that time, the demand for a Benilde-St. Margaret's education has exceeded our capacity, one of the key health indicators of an independent school. Furthermore, our development revenue has become stable representing approximately ten percent of our annual budget. Those trends look to be sustainable meaning revenue looks predictably positive.

The primary expenses experienced in schools are directly related to faculty and staff compensation. Benilde-St. Margaret's enters into this strategic plan with a competitive compensation package based on local benchmarks. Other operating costs related to facilities, curriculum, materials, etc. have been managed well over the past several years leading to balanced budgets.

The effectiveness of the governance model further solidifies financial stability of Benilde-St. Margaret's. The Board of Directors is involved in the examination of the school's financial situation at each board meeting, and also provides oversight of an annual independent audit. Furthermore, two board working committees, the Investment and Finance Committees, are staffed with experts in the field providing financial governance.

FINANCIAL ASSUMPTIONS

The following financial assumptions will be important to school leadership and the board of directors throughout the life of the next strategic plan.

- | | |
|---|--|
| 1. Tuition increases in line with market conditions | 5. Compensation competitive in the marketplace |
| 2. Advancement revenue supports strategic initiatives | 6. Working toward the elimination of long-term debt |
| 3. Sustained full student enrollment | 7. Facilities competitive with peer schools while supporting strategic initiatives |
| 4. Faculty to student ratios remain constant | |

FINANCIAL INVESTMENTS

Benilde-St. Margaret's enters into this strategic plan well positioned financially. The vast majority of the initiatives and corresponding action steps within the strategic plan require a reallocation of existing resources along with work realignment. However, financial investment will be necessary in support of some of the initiatives requiring long-term financial planning and successful fundraising.

The most significant investments in the next five years beyond our regular operating expenses will be related to our long-term debt, facilities maintenance and improvements, and faculty and staff retirement. The school is in position to examine different possibilities to address each challenge including resource reallocation, fundraising, asset liquidation and financing. The five-year financial planning process will be integral in defining the best paths forward.

Moderate investments in the plan are tied to technology applications designed to capture student learning experiences and alumni programs. There is the possibility that based on the capabilities of the applications, the replacement of current systems may be realistic. These costs will be met with resource reallocations.

Most of the new investments necessary as a part of the strategic plan are modest in the operating budget. Advancement, human resources, and theology will all require additional funding, however, each is incremental meaning a reallocation of resources will be sufficient. Furthermore, investments in the Advancement function will lead to revenue growth over the long-term.



METRICS AND PROGRESS ASSESSMENT

PROGRESS MONITORING

Over the past seven months, several stakeholders have lent their expertise to a collaborative strategic planning process that outlines the path forward for Benilde-St. Margaret's. *Rich History. Radiant Future.* details the Pillars, Strategic Directions, Rationale, Initiatives, and supporting Action Steps that will drive school strategy through 2025. Moving forward, the Strategic Planning Committee, a working committee of the Board of Directors, is charged with monitoring the progress of BSM's strategic plan throughout its life as a part of its regular meeting schedule. At regular intervals, the full Board of Directors will also examine the plan's progress. The implementation plan and measures of success are designed to provide progress information through 2025.

IMPLEMENTATION PLAN

The implementation map will outline the scope of the work over the course of five years to fulfill the Strategic Directions. This tool is critical to school leadership and will also be an important progress monitoring element for the Strategic Planning Committee and Board of Directors.

MEASURES OF SUCCESS

These measurement tools will supplement the implementation map to provide important governance information to the board and appropriate committees. They are not designed to measure every action step associated with the plan, that being the responsibility of school leadership, but to understand its development over time.

EXCEPTIONAL ACADEMICS

- Percentage of students on track annually for credentialed experiences
- Enduring skills performance dashboard
- Financial value of college credits earned

VIBRANT COMMUNITY

- Segmented enrollment dashboard
- Alumni participation rates
- ISACS survey

BEING CATHOLIC IN THE WORLD

- Student faith development survey
- Theology student engagement survey

INVESTING IN THE FUTURE

- Creation of 5-year financial models
- Annual and major gift revenue



ENVISIONING 2025

Embracing our profound responsibility as a dynamic Catholic learning community, Benilde-St. Margaret's continues to value a holistic approach to education that pushes every student in their development of body, spirit, and mind. Building on our reputation as an exceptional college preparatory school that brings forth innovative and meaningful learning experiences, each student is able to excel and find his or her place in the community. Collectively, these experiences provide the preparation, confidence and ethical foundation required to thrive in college and beyond. Red Knights are supported in their journey to live meaningful and purpose-filled lives. *Rich History. Radiant Future.* provides the pathway BSM needs to continue on the journey of becoming an educational leader, respected among Catholic college-preparatory schools across the nation.

Highly engaged in discovering who they are, our students dive into what they are passionate about, they dig deep in their personal faith as they grow and learn, finding a supportive community every step of the way. The sense of belonging is real. Red Knights understand that they are never alone, always connected in their faith and lasting relationships. Empowering student voice and providing choice in the learning experience, our faculty will challenge and inspire students as they reach their highest potential. Teachers are equipped and able to spark curiosity, nurture creativity, and support inquiry for all students. The focus on deep understanding through the examination of multiple and diverse perspectives will further prepare our students to live in a globally-connected world. Grounded in academic knowledge and enduring skills, our students are challenged to exceed their own expectations. In providing expanded opportunity to excel, students will enroll in record numbers of AP or dual credit courses, giving them a leg up in college. Students will feel fully supported as they try, stumble, learn and ultimately succeed in developing lifelong habits for growth.

"This Strategic Plan builds on our history of continuously challenging ourselves in terms of the environment in which we operate and the expectations of our students, in life and work, to provide a clear roadmap for the next level of Student Experience and Operational Excellence."

—Shay Wyley, Chair,
Board Of Directors



Eyes open to the world, ears attentive and spirit alert, our alumni will be uniquely blessed. Supported by the values of our spiritual charisms, they will respond to the signs of the times, providing the leadership our world needs as they live each day with joyful hearts. They will not only contribute to society but seek to transform it; using their knowledge and talents to critically examine and engage the world, always inspired by the Gospel call to love one another.

Our alumni community will span the globe, crossing professions, industries, ministries and generations. Being a Red Knight will be the identity that unites and nurtures us. All will feel a calling to return to Benilde-St. Margaret's to share their gifts as mentors, supporters or learning leaders. The values and inspirations of the Sisters of St. Joseph, the Christian Brothers, and the Benedictines will resonate throughout their lives, providing meaning to all they do. Personal Red Knight connections will last a lifetime and with the constant presence and support of our alumni, Benilde-St. Margaret's School will be poised to deliver its mission for generations to come.

Core Planning Team

Amanda Anderson, Guidance & College Counselor
Corrina Conley, Board of Directors, Alumna and Past Parent
Adam Ehrmantraut, President
Jeff Fix, Social Studies Teacher
Susie Hinnendael, Religion/Global Social Justice Teacher
Tom Janda, Strategic Planning Committee, Current Parent
Kari Koshiol, English Teacher, Alumna
Lisa Lenhart-Murphy, Director of Mission, Alumna and Current Parent
Fran McCloskey, Board of Directors, Current Parent
Jeff Olejnik, Board of Directors, Alumnus and Past Parent
Megan Peterson, Director of Marketing & Communications
Jerry Pettinger, Director of Athletics and Activities, Past Parent
Steve Pohlen, Director of Learning & Technology, Alumnus and Current Parent
Natalie Ramier, Chief Financial Officer, Current Parent
Charles Scott, Strategic Planning Committee, Current Parent
Claire Shea, Junior High Principal, Alumna
Susan Skinner, Senior High Principal
Jim Vogl, Board of Directors, Past Parent
Shay Wyley, Board of Directors, Current Parent



"This plan builds on our commitment to deliver the best experience possible for every BSM student by expanding our academic excellence, enriching our vibrant community, ensuring our financial stability, and celebrating our Catholic identity."

—Jim Vogl, Vice-Chair,
Board of Directors



Benilde-St. Margaret's

A Catholic, college preparatory school, grades 7 - 12

2501 Highway 100 South | St. Louis Park, MN 55416

Stay Connected:



Benilde-St. Margaret's

