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Journal of Catholic Education

Volume 21 | Issue 2

Article 11

June 2018

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Nicholas Wolsonovich Dr.  
*Adjunct Professor*, [nicholaswolsonovich@me.com](mailto:nicholaswolsonovich@me.com)

Mark Smilaycoff  
[mamilayc@kent.edu](mailto:mamilayc@kent.edu)

Maria Ribera  
[maria.ribera@cbservices.org](mailto:maria.ribera@cbservices.org)

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## Recommended Citation

Wolsonovich, N., Smilaycoff, M., & Ribera, M. (2018). A National Study of Regional Catholic School Systems. *Journal of Catholic Education*, 21 (2). <http://dx.doi.org/10.15365/joce.2102112018>

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## EDUCATION IN PRACTICE

### A National Study of Regional Catholic School Systems

Nicholas M. Wolsonovich  
Mark Smilaycoff  
Maria Ribera

*This article presents the results of an inquiry into the advantages and disadvantages of regional Catholic school systems, executed by practitioners in the field of Catholic Education. The findings support the idea that the regional Catholic school system is a valuable strategy for providing Catholic education in areas where traditional parish-based schools are no longer viable and suggest that the six major school functions—management, educational programming, school community, Catholic identity, finances, and enrollment—are strengthened as a result of the regional Catholic school system approach. The findings indicate that implementation of the regional system will be most successful when it is supported by all the stakeholders, especially the clergy involved with the schools.*

Many Catholic schools across the nation have experienced difficulties with long-term viability due to lower enrollments, higher operating costs, and the challenges of enhancing academic rigor to maintain their competitive edge in the marketplace. To address these issues, many archdioceses and dioceses have decided to reorganize their parish schools into various types of regional school systems in which the schools collaborate to increase their long-term financial viability and academic competitiveness, therefore, making them more attractive to families.

The nature of these regional Catholic school systems varies across the country and between dioceses. They differ in terms of sponsorship, governance, finances, and administration among other factors. For the purpose of this study, a regional school system is defined as a group of schools which (a) has been established canonically as a separate juridic person and civilly incorporated within its state, (b) is governed and administrated collectively via a single governing structure, i.e., a board of trustees, and (c) has designated personnel serving in an administrative capacity to provide oversight to all schools, i.e., a president or system director.

*Journal of Catholic Education*, Vol. 21, No. 2, June, 2018, 175-187. This article is licensed under a Creative Commons Attribution 3.0 International License. doi: 10.15365/joce.2102092018

Some of the national efforts to reorganize as a school system have been very successful while others have not. It is the purpose of this study to begin to determine those practices and strategies that have yielded positive outcomes and those that have not. As a result, other archdiocesan and diocesan school leaders, as they may consider similar school reorganizations, are able to learn from the experiences of those earlier efforts.

### Data Collection

The data collection for this study consisted of online surveys and follow-up phone calls conducted in three phases. The first survey consisted of the Superintendent Questionnaire that was distributed to all Catholic school superintendents across the United States, including US territories. Archdioceses and dioceses were identified from a database provided by the National Catholic Educational Association. One hundred sixty-nine dioceses and archdioceses with contact information were identified. Each superintendent was initially asked if there were any systems in their archdiocese or diocese that met the definition of a school system used herein. Only those superintendents who responded in the positive were asked to complete the remainder of the questionnaire. Finally, the superintendents were asked to provide contact information for the chief executive (president or director) of each of the school systems in their dioceses or archdioceses. Twenty-four superintendents provided contact information for 60 school systems in their archdioceses or dioceses. An additional 14 superintendents indicated that they have school systems, but provided no contact information or indicated that all questions should be directed to the superintendents' offices.

The second survey consisted of the distribution of the School System Questionnaire to all school systems (presidents or directors) identified within the Superintendent Questionnaire or through the follow-up phone calls. Survey invitations were distributed to the 60 school systems identified in the first phase of the study and to the superintendents who requested that they receive any surveys. Additional school systems were identified through follow-up phone calls resulting in 129 survey invitations<sup>1</sup> in this phase. The school system presidents or directors were asked to provide contact information for five stakeholders within their school system from each of the following groups: board members, parents, pastors, and principals. Fifty-six presidents or directors responded to the survey.

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1 In many cases, additional survey invitations were distributed to systems at the request of a system president or director through the follow-up phone calls.

The third survey consisted of the distribution of the Stakeholder Questionnaire to all stakeholders identified within the first two questionnaires. Survey invitations were distributed to 292 school system stakeholders, including superintendents, system presidents/directors, board members, principals, pastors, and parents. The Stakeholder Questionnaire contained questions concerning the opinions of stakeholders regarding their experiences with school systems. School system stakeholders were asked a series of questions about (a) the impact of their school systems on the viability of their Catholic schools and (b) the advantages and disadvantages of school systems across a variety of aspects of Catholic education. One hundred twenty-nine stakeholders responded to the survey, though responses vary by question because stakeholders had the option of skipping questions on the survey.

### **Demographics**

While an attempt was made to collect data from equal numbers of each relevant group of Catholic school system stakeholders, not all groups responded equally. Thirty-five percent of respondents were board members, 19% were superintendents, 18% were principals, with the remaining respondents evenly divided between school system presidents and pastors. Stakeholders were also asked to indicate their gender and state in life. Approximately half of the respondents were of each gender. Regarding state in life, 88% of stakeholders indicated that they were laypersons, while 11% indicated that they were clergy.

Thirty-three percent of the school systems were located in “urban, not inner-city” areas and 31% were located in “suburban” areas. Eighteen percent of the school systems were located in the “inner-city,” and 18% were in the “rural” areas. Forty-two percent of the school systems were sponsored by archdioceses and dioceses, and 38% were sponsored by parishes.

### **Results**

School system stakeholders were asked a series of questions about (a) the impact of their school systems on the viability of their Catholic schools and (b) the advantages and disadvantages of school systems across a variety of aspects of Catholic education. Finally, stakeholders were asked about their recommendations to improve their own school system and to advise other Catholic school leaders that are considering establishing school systems.

Based upon their understanding of the rationale for organization as a school system, stakeholders were asked to indicate their level of agreement

or disagreement with two statements regarding the change in the structure of their parish schools to school systems. The first statement was concerned with the necessity of changing from parish schools to a school system as a means of survival for Catholic education. More than 78% of stakeholders indicated that they either strongly agreed or agreed that the change to a school system was necessary for Catholic education to survive in their parishes. The second statement was concerned with the future viability of Catholic education as a result of the change in structure to the school system model. More than 83% of stakeholders indicated that they either strongly agreed or agreed that the change to a school system will strengthen the viability of Catholic education in their parishes. Complete results for responses to these items are given in Table 1.

Most respondents believed that with the rising costs of Catholic school tuition, there is a need to find ways to make Catholic schools more affordable and to support families keeping their children in Catholic schools. They also noted that the regional Catholic school system approach is necessary and worthy of consideration in order to make Catholic school education more viable in the future.

Table 1

*Opinions regarding the change in structure from parish schools to a school system*

Questionnaire items	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
The change in structure to form a school system was necessary for our schools to survive.	46 44.66%	35 33.98%	16 15.53%	3 2.91%	3 2.91%
The school system model will strengthen the viability of our schools.	41 40.20%	44 43.14%	11 10.78%	3 2.94%	3 2.94%

### **Advantages and Disadvantages**

Stakeholders were asked to indicate whether school systems were advantageous or disadvantageous in relation to each of 16 aspects of Catholic school education. In addition, stakeholders were asked to explain in greater depth those aspects of Catholic school education for which school systems were most advantageous or disadvantageous. For the purpose of analysis, these 16 aspects of Catholic school education were combined into the follow-

ing six categories: management, finances, educational programming, school community, enrollment, and Catholic identity. Both quantitative and qualitative results follow.

**Management.** The management category was composed of the aspects of educational leadership, governance, and strategic planning. More than 80 percent of stakeholders indicated that they believed regional Catholic school systems to be either a great advantage or an advantage for Catholic school management, with the greatest advantage being for strategic planning. Complete management results are given in Table 2.

Stakeholders were asked to elaborate regarding the advantages and disadvantages of school systems as they relate to the management of Catholic schools. The qualitative data essentially supported the benefits of such systems in the areas of governance and educational leadership. Many of the respondents reported that the system approach positively affected the operation of the school boards and that the governance and leadership of the school were strengthened by virtue of having more lay people serving on the boards. A few respondents cited blurred lines of authority and unqualified board members as problems. Most of the board members reported that they received too little in-service and that it didn't deal with all the aspects of how board committees operate and the general responsibilities of the board.

Table 2

*Advantages and disadvantages for Catholic school management*

Aspects of Catholic school management	Great		Neither		Great
	Advantage	Advantage	Advantage nor Disadvantage	Disadvantage	Disadvantage
Educational Leadership	39 40.21%	35 36.08%	18 18.56%	2 2.06%	3 3.09%
Governance	29 29.90%	46 47.42%	15 15.46%	4 4.12%	3 3.09%
Strategic Planning	45 45.92%	41 41.84%	8 8.16%	2 2.04%	2 2.04%

A majority of respondents stated that the strategic planning responsibility of the board was initiated or enhanced as a result of the school system approach. These respondents reported that it created a common, cohesive mission which sent a clear unifying message to the stakeholders regarding the purpose and goals of the school system.

In respect to some of the disadvantages cited by the respondents, the greatest concern expressed by most respondents was that the clergy were not as supportive as either desired or needed. A few of the respondents stated that the lack of clergy support was “killing” the system.

**Finances.** The finances category was composed of the aspects of general finances, buildings and facilities, and fund raising and development. More than 70 percent of stakeholders indicated that they believed school systems to be either a great advantage or an advantage for Catholic school finances, with the greatest advantage being for general finances. Complete finances results are given in Table 3.

Many respondents identified a number of financial advantages of operating a regional Catholic school system. Among the most often cited by the respondents included economies of scale and pooling and sharing of resources. Another significant advantage of the school system approach reported by many respondents was that the school system demanded a consistency of good financial accounting across all participating schools. Several respondents believed that these new financial accounting procedures led to greater financial transparency and more active support on the part of donors who were more willing to sustain a well-managed organization that is being operated in a professional manner. Several respondents felt that the improved financial management led to greater financial solvency and financial security which increased the support from the greater community.

Table 3

*Advantages and disadvantages for Catholic school finances*

Aspects of Catholic school finances	Great		Neither Advantage nor Disadvantage		Great
	Advantage	Advantage	Disadvantage	Disadvantage	Disadvantage
General Finances	44 44.90%	36 36.73%	8 8.16%	7 7.14%	3 3.06%
Buildings & Facilities	23 23.71%	33 34.02%	34 35.05%	5 5.15%	2 2.06%
Fund raising & Development	38 38.78%	42 42.86%	10 10.20%	6 6.12%	2 2.04%

It was reported by some respondents that in a few school systems, fundraising and development efforts improved because of the more unified and professional manner in which institutional advancement activities were being conducted.

Among the disadvantages cited by respondents was that the parishes with greater financial resources were not able to support the parishes with lesser resources. In addition, some respondents indicated that different schools in the same school system had varying degrees of fundraising abilities which would be needed to offset the subsidy disparities of parishes. Along with this issue was the concern expressed by some respondents that it was difficult to convince wealthier parishes of the need for parity among participating schools, where wealthier parishes shared their resources with the school system, thereby assisting in the financial support of the less wealthy parishes.

**Educational Programming.** The educational programming category was composed of the aspects of integration of technology, academic program, professional development, and co-curricular and extra-curricular activities. More than 77 percent of stakeholders indicated that they believed school systems to be either a great advantage or an advantage for Catholic schools educational programming, with the greatest advantages being for academic program and co-curricular and extra-curricular activities. Complete educational programming results are given in Table 4.

Most respondents reported that there were more advantages than disadvantages regarding educational programming with the school system model. The greatest advantage reported by many respondents was that the school system approach provided a more rigorous curriculum with greater articulation of curriculum and instruction throughout the school system. A majority of respondents stated that the school system allowed for more varied extra-curricular programs and activities.

Along with the enhanced curriculum, many respondents stated that the professional development programs for the teachers, to support the more demanding curriculum, were significantly improved. A few respondents also stated that there was evidence of richer teacher interaction and collaboration and that these efforts resulted in higher standardized achievement test scores. In addition, many respondents reported that the social environment for the students was improved. Several respondents reported that, in a few school systems, there was an enrollment increase which provided additional resources to hire more teachers, support additional curricular offerings, and purchase needed instructional equipment, all of which strengthened the academic programs.



With respect to the disadvantages, it was reported by a few respondents that the teachers felt less secure in their jobs and that they were not brought on board from the very beginning of the planning process. Several respondents were concerned that the weaker academic program in some schools could diminish the academic program in schools with a stronger curriculum.

Table 4

## Advantages and disadvantages for Catholic school educational programming

Aspects of Catholic school educational programming	Great Advantage		Neither Advantage nor Disadvantage		Great Disadvantage
Integration of Technology	33 34.02%	39 40.21%	20 20.62%	1 1.03%	4 4.12%
Academic Program	36 36.73%	42 42.86%	16 16.33%	3 3.06%	1 1.02%
Professional Development	36 36.73%	40 40.82%	18 18.37%	3 3.06%	1 1.02%
Co- & Extra- Curricular Activities	38 38.78%	40 40.82%	17 17.35%	2 2.04%	1 1.02%

**School Community.** The school community category was composed of the aspects of community support and morale, teacher and administrator morale, and communication with constituent groups. More than 62 percent of stakeholders indicated that they believed school systems to be either a great advantage or an advantage for the Catholic school community, with the greatest advantage being for communication with constituent groups. Complete school community results are given in Table 5.

Table 5

Advantages and disadvantages for Catholic school community

Aspects of Catholic school Community	Great Advantage	Advantage	Neither Advantage nor Disadvantage	Disadvantage	Great Disadvantage
Community Support & Morale	21 21.43%	38 38.78%	22 22.45%	15 15.31%	2 2.04%
Teacher & Administrator Morale	19 19.39%	39 39.80%	27 27.55%	8 8.16%	5 5.10%
Communication w/Constituent Groups	26 26.53%	40 40.82%	19 19.39%	12 12.24%	1 1.02%

With regard to factors related to the school community, there appeared more advantages than disadvantages. In respect to the advantages, many respondents indicated that the system approach did pull people together across the community to work on various school projects and committees and, as a result, there were more people involved in the life of the schools.

However, there were many disadvantages cited by respondents. The greatest disadvantage expressed by many respondents was that the schools would lose their sense of parish affiliation. Many respondents reported that some individual schools in the school system attempted to protect their unique identities and were less likely to work together. A few respondents reported that some parishes continued to be territorial and experienced difficulty in expanding their sense of the greater Church beyond their own parish. A few parents reported that they did not feel a part of the school system which made it hard to build a sense of community throughout all of the schools in the school system.

**Enrollment.** The enrollment category was composed of the aspects of enrollment and marketing. More than 79 percent of stakeholders indicated that they believed school systems to be either a great advantage or an advantage for Catholic school enrollment, with the greater advantage being for marketing.<sup>2</sup> Complete enrollment results are given in Table 6.

<sup>2</sup> Following the establishment of the regional school system, 30 % of the systems reported a decrease in actual enrollment of “5 % or more.” Fifty-one percent of the school systems maintained their enrollment from when they operated individually, and 19% experienced an increase in actual enrollment of “over 5 %.”

Many respondents reported a number of positive advantages to enrollment from a school system perspective. A majority of respondents reported that the school system's marketing programs were greatly enhanced. In some cases, professionals were used to direct the school system's marketing program. Several respondents reported that the larger student bodies, created by joining schools together into a system, were instrumental in attracting other students and that the increase in enrollment also increased student diversity.

Table 6

## Advantages and disadvantages for Catholic school enrollment

Aspects of Catholic school enrollment	Great Advantage	Advantage	Neither Advantage nor Disadvantage	Disadvantage	Great Disadvantage
Enrollment	30 30.61%	43 43.88%	18 18.37%	5 5.10%	2 2.04%
Marketing	41 41.84%	42 42.86%	13 13.27%	0 0.00%	2 2.04%

The disadvantages were mixed. A number of respondents reported that the school system's limited resources, which were spent on school system central office activities and personnel, should have been used to support a stronger marketing program. Other respondents also stated that it is much more difficult to market a school system over a parish school. They believed that the marketing program should be school-based, not system-based.

**Catholic Identity.** The Catholic identity category was composed of the single aspect of Catholic identity. More than 66 percent of stakeholders indicated that they believed school systems to be either a great advantage or an advantage for Catholic identity. Complete Catholic identity results are given in Table 7.

Table 7

## Advantages and disadvantages for Catholic Identity

	Great Advantage	Advantage	Neither Advantage nor Disadvantage	Disadvantage	Great Disadvantage
Catholic Identity	34 34.69%	31 31.63%	28 28.57%	4 4.08%	1 1.02%

Most respondents did not report any negative impact on the Catholic identity of the schools as part of a school system approach. However, in some cases, a few respondents felt that the individual schools in the school system could lose some of their identity with their home parish.

Several respondents reported that there was an increase of non-Catholic enrollment and that the Catholic students/families were appreciative of the opportunity for their children to share their faith with students who were not Catholic. One school reported that over a four-year period, 24 non-Catholic students converted to Catholicism.

Many respondents also stated that they believed the school system created a unified vision of the faith mission for the schools which was beneficial in the school system's marketing program.

### **Recommendations for Operating Regional Catholic School Systems**

Most respondents felt that, first and foremost, it is critical to get the support of the bishops and pastors. Many respondents felt that without the clergy's consistent, visible, and vocal support the school systems will struggle. It was noted by some respondents that the traditional sense of parochialism hindered the support of the school system effort.

It was reported by many respondents that it is a significant change to go from parish schools to a regional school system, and it takes time to make the necessary mental reorientation as well as the operational adjustments. Many respondents recommended that the school system's board be selected by the system sponsors with particular skill sets in mind and be provided appropriate in-service as to their roles and responsibilities. Most respondents believed that the board needs to create a five-year strategic plan for the new system and to take sufficient time to implement and evaluate the plan. Many respondents noted that for the benefits of a regional school system to be realized takes time. The majority of respondents believed that the leadership and support of the principals is important since it is the principal who interfaces with the families on a daily basis and significantly forms their opinions.

It was noted by many respondents that throughout the initial stages of establishing the school system, it is critical that the school system communicate with all of the stakeholders in a transparent manner. Many respondents believed that a well-balanced and comprehensive communication plan needs to be developed and implemented by the school system. Most respondents felt that it is important that the school system maintain good communication with each of the parishes involved to strengthen the school system's connection to the parishes.

Some respondents felt that it was very important to work closely with those parents and others who were very much opposed to the new school system. Some respondents stated that many of the people who were initially negative were convinced of the need for the school system approach when they were presented with the facts and were involved in the early planning stages. Most respondents stated that it would be particularly important for the new school system to pay close attention to those parishes which had experienced the closure of a school as the reorganization into a school system was implemented.

Many respondents stated that it was necessary to complete comprehensive planning prior to any reorganization effort and to consult with other archdioceses and dioceses that have already initiated the regional school system approach. A few respondents advised archdioceses and dioceses contemplating such a school system to work with a “mentor” or consultant to develop a strategic plan and to take time to implement and evaluate the model. Teachers need to be included in the planning, and parents and families must be consulted. Finally, many respondents noted that it was important to keep “what’s best for kids” as the focus of the planning process.

### Conclusions

This research strongly supports the idea that the regional Catholic school system is an effective and viable strategy to employ in order to continue to provide quality Catholic school education in areas where traditional parish-based schools are no longer viable. The research concludes that the six major school functions of management, educational programming, school community, Catholic identity, finances, and enrollment are all strengthened as a result of the school system approach to organizing schools. However, it clearly identifies the absolute need of the clergy’s support and for the clergy’s willingness to share in the governance of the schools in order to experience these potential advantages.

Our research indicates that in order for the school system to be successful in creating long-term viability for Catholic schools, the design and implementation of the regional system must be done correctly, completely, and be supported by all the stakeholders, especially the clergy who influence the opinions of many of the other stakeholders. Partial implementation of the system approach will not likely be successful. Our research supports the conclusion that regional Catholic school systems can be successful when correctly implemented and fully supported by the clergy and the laity together.

*Nicholas M. Wolsonovich, Ph.D. is a former Superintendent in the Dioceses of Orlando, Florida, Chicago, Illinois, and Youngstown, Ohio. Currently, he is an adjunct consultant with Catholic School Management. The complete study with additional findings, planning process, and timeline are available by contacting Dr. Nicholas M. Wolsonovich at [nicholaswolsonovich@me.com](mailto:nicholaswolsonovich@me.com)*

*Mark Smilaycoff, Ph.D. is a research and evaluation consultant.*

*Maria Ribera, M.S. is a Senior Executive Consultant with Catholic School Management.*