Catholic School Management

2017

-SUMMER-

Certificate Programs

June 26 - 28, 2017

"I have attended many professional development programs but this one by CSM is by far the most superb."

Jennifer Mallet, Principal
Bishop Rosecrans High School

CSM

A division of Christian Brothers Services

Learn what you need to know to transform your school! The most complete professional development programs for Catholic school leaders.

Enjoy high quality learning combined with time to build community, all in a sensational Monterey Bay setting.

Welcome Letter

Dear Colleague in Catholic Education:

It continues to be our mission to provide the highest level of professional and personalized service to Catholic educational institutions in order to make certain that Catholic schools not only survive, but flourish. It is also part of our vision to empower all servant leaders who are committed to Catholic education in a professional, lay, volunteer, or religious capacity to attain their optimal performance in carrying out the mission of Catholic education. For more than 30 years, the Catholic School Management Summer Certificate Programs have been supporting both our mission and vision.

In 2017, our program offerings continue in this tradition with a focus on the most critical needs of today's Catholic schools: successful leadership, marketing and enrollment, and institutional advancement. Especially designed in response to today's changing landscape for Catholic schools, we are pleased to offer a timely program in Welcoming Hispanic Families and Developing Cultural Competencies. The 2017 program offerings will again include a unique offering for Catholic high school guidance counselors, incredibly well received by those at our 2016 session: *Exceptional Catholic High School Guidance and Counseling*. Using the National Standards and Benchmarks for Effective Catholic Elementary and Secondary Schools as a reference point, our offerings are structured to assist you with putting into practice programs and strategies to enhance:

- Mission and Catholic Identity
- Governance and Leadership
- Academic Excellence
- Operational Vitality

Over a more than 40-year history, CSM has worked with close to two-thirds of today's Catholic schools, with almost all of our client schools remaining open. The commitment and expertise of our consultants is clear. Furthermore, our commitment to you and understanding your needs is stronger than ever. Our programs are designed so that they:

- Provide practical and proven strategies to meet your goals and grow your school;
- Offer options for those new to Catholic schools and those with years of experience;
- Expand your understanding of the contemporary Catholic school landscape and vision for the future;
- Encourage the attendance of teams through program structure, offerings, value and pricing;
- Present multiple opportunities to network or relax, to learn or reflect, to worship and build community, and to have fun while planning for 2017-2018.

We look forward to having you with us in June on the beautiful Monterey Bay. Perhaps you will also be able to bring along family members to enjoy all that California's Central Coast has to offer? Please direct others to this brochure to build your team of attendees.

It is my greatest honor and pleasure to lead our talented and inspiring group of CSM consultants, and I personally look forward to sharing our collective knowledge and passion for Catholic schools with you this summer.

Sincerely,

Maria J. Ribera
President of Catholic School Management

Welcome to the Monterey Bay and CSM's Summer Certificate Program

Location Highlights

The Monterey Bay is well known for its natural beauty and many attractions making it a destination spot on California's Central Coast. The 2017 Summer Certificate Programs will be held at the Embassy Suites Hotel and Conference Center on the Monterey Bay providing all attendees with the chance to enjoy an incredible setting while engaging in meaningful and transformational professional development.

Traveling to Monterey is simple with flights directly into the Monterey Regional Airport, just 2 miles from the Conference Center. Alternatively, nearby airports include the major international airports of both San Francisco and San Jose. Given the fantastic location and many things to do in the local and extended area, take an extra day, bring the family and visit the renowned Monterey Bay Aquarium, Cannery Row, and a coastline of sensational beaches from Santa Cruz to Big Sur. Monterey is John Steinbeck's backyard, rich in historical experiences from literature to nearby California Missions in Carmel and San Juan Bautista. Don't forget the beauty and bounty of the Central Coast wine country and wine trail as part of an excursion to explore the local flavors and fame of the region.

Program Highlights

Why Choose the CSM Summer Certificate Programs?

- 40+ years of experience working successfully with Catholic schools and navigating the changing landscape of challenges facing Catholic schools
- Comprehensive offerings aligned with *National Standards and Benchmarks for Effective Catholic Elementary and Secondary Schools*
- Comprehensive, three-day programs in the most mission critical topics: *Successful Leadership, Enrollment Management and Marketing and Institutional Advancement*
- Unique three-day programs in *Welcoming Hispanic Families and Developing Cultural Competencies and Exceptional High School Guidance and Counseling Programs for Catholic High Schools*
- Dynamic, daily keynote sessions focused on keeping all attendees informed and prepared to achieve Catholic school success
- Ideally suited to bring a school team making this professional development opportunity a time to build community and a shared mission, vision, and strategy for growth and sustainability
- Daily lunch discussion roundtables, sample sharing, and other opportunities to grow professional networking relationships
- Special topic program sessions that are capped at 24 participants to ensure an optimal learning environment
- Relaxing environment providing participants with a place to unwind in the evenings with a Mass at San Carlos Cathedral and wine tasting on the Monterey Bay, all in a beautiful setting close to the beaches of the Monterey Bay and the Central Coast Wine Country
- Appointments available to meet with CSM consultants to gain more strategies to support school leaders in ensuring exceptional Catholic schools

Early Bird Discounts
Register by April 1

Registration for 2017 Certificate Programs closes on June 1, 2017.

A deposit of $100 must accompany the registration form.

Costs and General Program Information

Program Costs, Discounts and Refund Policy

Registration cost includes lunch on Monday and Tuesday, welcome Mass and dinner on Monday evening, and wine tasting on the Monterey Bay along Cannery Row on Tuesday evening.

Pricing

Registration cost includes program materials, lunch on Monday and Tuesday, and daily coffee/refreshments. In addition, all participants are invited to evening events including a Mass and reception at San Carlos Cathedral in downtown Monterey and wine tasting overlooking the Monterey Bay on Cannery Row.

Early Bird Registration – Before April 1, 2017	$750
Regular Registration – April 1 - May 15, 2017	$799
Late Registration – After May 15, 2017	$875

An "early bird discount" will be given to those registering prior to April 1. To receive this discount, your registration deposit must be postmarked on or before April 1. Limited financial assistance is also available.

Group discounts for individual schools begin at $50 for sending 3 or more attendees. Contact Catholic School Management at CSMoffice@cbservices.org or at 203.421.5169 for information regarding school groups of more than 3 and discounts for larger arch/diocesan groups.

As a division of Christian Brothers Services, Catholic School Management offers a discounted rate for anyone attending from a Lasallian school. Please contact Catholic School Management at CSMoffice@cbservices.org or at 203.421.5169 for information.

Registration for 2017 Certificate Programs closes on June 1, 2017. A non-refundable deposit of $100 must accompany the registration form. A full refund, less the deposit, will be provided for cancellations made by June 1, 2017.

A Wealth of Resource Materials to Support Your Summer Program Experience and Beyond

All of Catholic School Management's Summer Certificate Programs are accompanied by a rich selection of materials for you to take with you for continued use for enhancing your work on behalf of Catholic schools. While some materials are provided in print form during the daily sessions, you will be provided with electronic copies of all of the daily presentations and resource materials for easy transportation and sharing. Please bring a device (laptop, tablet, etc.) with you so that you can fully take advantage of this digital learning opportunity. Resource materials will be provided on a USB flash drive included in your Certificate Programs Welcome Packet. Resource materials will also be made available online for devices not equipped with a USB port.

Travel, Conference Location and Accommodations

Travel

Air travel to the Monterey Peninsula has a variety of options:

1. Monterey Regional Airport (complimentary shuttle to the Embassy Suites Hotel) www.montereyairport.com. Daily flights can be found on Alaska, American, United and Allegiant Airlines
2. Mineta San Jose International Airport (70 miles) and San Francisco International Airport (95 miles)

   Shuttle service from San Jose and San Francisco airports available through Monterey Airbus www.montereyairbus.com.

Conference Location and Lodging

The CSM Summer Certificate Programs will be held at the Embassy Suites Hotel and Conference Center, Monterey Bay, in Seaside, CA. A block of rooms has been designated with special pricing for Summer Certificate Program attendees. Accommodations at the Embassy Suites include the following:

- Complimentary cooked-to-order breakfast
- Complimentary evening reception
- Complimentary airport shuttle to and from Monterey airport (2 miles)
- On-site restaurant and lounge
- Indoor pool and sauna
- Fitness center
- Bicycle rentals
- Pool table
- Video arcade
- Business center
- Gift shop

Room pricing is $189/night from Sunday, June 25 through Wednesday, June 28 for both single and double occupancy rooms. Reserve early, and before May 20, 2017, to receive this special conference rate!

Please contact the Embassy Suites directly to reserve your room and mention the Catholic School Management Summer Certificate Programs: 1441 Canyon Del Rey, Seaside, CA, 831.393.1115, www.embassymonterey.com.

The Embassy Suites has a convenient location, just a few blocks from the beach and the Monterey Bay Coastal Recreation Trail. Other nearby attractions include: Monterey Bay Aquarium, Old Fisherman's Wharf, Cannery Row, San Carlos Cathedral, Mazda Laguna Seca Raceway, Bayonet and Blackhorse and Pebble Beach golf courses, and much more!

Other Accommodation Options

More information on the area and lodging can be found at: www.seemonterey.com/regions/seaside/

Should the Embassy Suites be unavailable, the Holiday Inn Express at Monterey Bay is located next door: 1400 Del Monte Avenue, Seaside, CA, 831.394.5335 (Front Desk) and the Hampton Inn Monterey is also nearby: 2401 Del Monte Ave., Monterey, CA, 831.373.7100.

"I hope to get a chance to take all of this information back and use it as soon as possible!"

Wendi Torell, Director of Development
Old Mission School
2016 Enrollment Program Participant

"You have a wonderful program. I was extremely impressed with the high quality and knowledge of each and every presenter that I encountered in my sessions."

Mary Hubbell, Board Chair
Sacred Heart Parish School
2016 Leadership Program Participant

"Great roundtable, small group discussions."

Patty Kulpa, Director of College Counseling
Nolan Catholic High School
2016 Guidance & Counseling Program Participant

DAY 1 - Monday, June 26 **Daily Opening Session** for all three days 8:30 a.m. - 9:00 a.m.	DAY 2 - Tuesday, June 27	DAY 3 - Wednesday, June 28
Keynote 9:00 a.m. - 10:00 a.m. *The Changing Face of Catholic Schools: The Journey from Welcoming to Belonging*	*Responding to Change: Case Studies of Success*	*Today's Catholic School and Trends for Tomorrow*
Program 1 Successful Leadership		
Program General Sessions 10:15 a.m. - 12:00 p.m. *Foundational Documents for Today's Successful Schools*	▪ *Leadership: Changing Needs for Changing Times* ▪ *Leadership: New Leaders Toolbox*	▪ *Communication Strategies for Successful School Leaders* ▪ *Opportunities for Soliciting and Responding to Parent Feedback*
Program Deep Dive Session 1:00 p.m. - 3:45 p.m. *Beyond the Budget: Financial Planning for School Leaders*	*Good to Great: Successful School Board Practices*	
Program Special Topic Session 1:00 p.m. - 2:15 p.m. *Organizing for Success: Models and Best Practices*	*Human Resources: Hiring and Crisis Management*	*Certificates are presented for each program at the closing session 12:00 p.m. - 12:30 p.m. on Wednesday.*
Program Special Topic Session 2:30 p.m. - 3:45 p.m. *Using Data to Build and Monitor Success*	*Developing and Evaluating Personnel*	
Program 2 Enrollment Management and Marketing		
Program General Sessions 10:15 a.m. - 12:00 p.m. *Enrollment Management Framework (single session)*	▪ *Mission, Markets and Message* ▪ *Visual Branding and Unified Communications*	▪ *Events: The Enrollment Funnel vs. The Enrollment Pipeline (High School)* ▪ *Events: The Enrollment Funnel vs. The Enrollment Pipeline (Elementary School)*
Program Deep Dive Session 1:00 p.m. - 3:45 p.m. *Enrollment 101: Research, Message, Influencers, Planning, Goal Setting and Reporting*	*Using Social Media Marketing and Analytics*	
Program Special Topic Session 1:00 p.m. - 2:15 p.m. *Implementing a Distinctive Marketing Message*	*Digital Marketing: Website and Video Strategies*	*Certificates are presented for each program at the closing session 12:00 p.m. - 12:30 p.m. on Wednesday.*
Program Special Topic Session 2:30 p.m. - 3:45 p.m. *Engaging School-Wide Accountability*	*Student and Parent Ambassador Programs*	
Program 3 Institutional Advancement		
Program General Sessions 10:15 a.m. - 12:00 p.m. ▪ *The Comprehensive Advancement Plan: Making the Case for Giving* ▪ *Developing the Advancement Team*	▪ *Establishing an Annual Giving Campaign* ▪ *Cultivating Donors and Securing Major Gifts*	▪ *Creating the Comprehensive Advancement Plan* ▪ *Today's Successful Parent, Alumni and Community Relations Programs*
Program Deep Dive Session 1:00 p.m. - 3:45 p.m. *The Development Communication Plan: Print, Web, Electronic, Social*	*Comparing Roles: The Development Team and the Development Committee of the Board*	
Program Special Topic Session 1:00 p.m. - 2:15 p.m. *Apps for the Development Office*	*Success Factors for Annual and Special Events*	*Certificates are presented for each program at the closing session 12:00 p.m. - 12:30 p.m. on Wednesday.*
Program Special Topic Session 2:30 p.m. - 3:45 p.m. *Online Giving, Social Media, and Leveraging an Ambassador Program*	*Best Practices for Planned Giving Programs*	
Program 4 Exceptional Catholic High School Guidance and Counseling		
Program General Session 10:15 a.m. - 12:00 p.m. *Overview: Effective Counseling Programs in Catholic High Schools*	*Specialized Realms of Knowledge: The Complete Counseling Office Repertoire*	*Ensuring Student and Counselor Success: Resources, FAQs, Evaluation*
Program Deep Dive Session 1:00 p.m. - 3:45 p.m. *Structure, Schedule and Services* ▪ *Communication: External and Internal Practices* ▪ *Daily Life in the Counseling World*	*Using Naviance: Selecting Tools to Maximize Outcomes* ▪ *Best Practices in Account Use and Management* ▪ *Inventories, Tools and the College Process*	*Certificates are presented for each program at the closing session 12:00 p.m. - 12:30 p.m. on Wednesday.*
Program 5 Welcoming Hispanic Families and Developing Cultural Competencies		
Program General Session 10:15 a.m. - 12:00 p.m. *Catholic School Environment & Culture in an Increasingly Diverse Church* ▪ *History* ▪ *Deep Dive in Data on Schools* ▪ *Case Study*	*Budgeting & Finance in Relation to an Inclusive and Welcoming Environment*	*Creating the Plan: From Welcoming to Belonging*
Program Deep Dive Session 1:00 p.m. - 3:45 p.m. *Creating the Welcoming Environment in Catholic Education & Stakeholder Involvement* ▪ *Stages of Development* ▪ *Considerations for Different Cultures* ▪ *Racial Tensions* ▪ *School Site Scenarios*	▪ *Marketing & Outreach: Practical Strategies* - *Grassroots and Formal Initiatives* ▪ *Conversion of Strategies to Practice* - *Scenario Studies*	*Certificates are presented for each program at the closing session 12:00 p.m. - 12:30 p.m. on Wednesday.*

Daily Closing Session for Monday and Tuesday 4:00 p.m. - 4:30 p.m.

Programs end at 12:30 p.m. on Wednesday

1 Successful Leadership

Overview:

This three-day program supports school leaders in remaining focused on mission with timely, innovative, and pragmatic information to enhance organizational functioning, board effectiveness, planning, communication, and financial management. Understanding of leadership styles and related consideration for success are explored and discussed to provide strategies and solutions to support a "best fit" approach to responding to the call to lead, and to serve.

Who Should Attend

- Presidents
- Principals
- Administrative Team Members
- Board Chairs and Members
- Pastors
- Diocesan Superintendents/ Vicars of Education
- Diocesan Personnel
- Business Managers

Lead Program Presenters

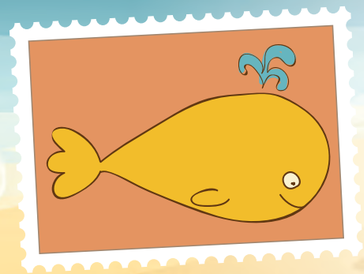
- Robert Bailey
- Richard Burke
- Dr. Lois Cavucci
- Dr. Austin Conley
- Maria Ribera

Session Topics Offered:

- Foundational Documents: Mission, Philosophy, Vision, the Profile of the Graduate at Graduation
- The Strategic Plan
- Organizational Models, Roles, and Ensuring Accountability
- Communication Strategies for Successful School Leaders
- Successful School Board Practices: The Basics of Bylaws to Running a Great Board Meeting
- Managing Personnel and Successfully Navigating Crises
- Using Data to Build and Monitor Success
- Financial Planning and Reporting
- Budget Development and Monitoring

Monday, June 26 - Daily Schedule

8:00 a.m.	**Coffee Available and Sample Sharing Tables Open**
8:30 a.m. to 9:00 a.m.	**Morning Prayer, Daily Announcements and Program Information**
9:00 a.m. to 10:00 a.m.	**Keynote** *The Changing Face of Catholic Schools: The Journey from Welcoming to Belonging*
10:00 a.m. to 10:15 a.m.	**Break**
10:15 a.m. to 12:00 p.m.	**Morning General Session** *Foundational Documents for Today's Successful Schools*
12:00 p.m. to 1:00 p.m.	**Networking Lunch with Discussion Roundtables**
1:00 p.m. to 3:45 p.m.	**Afternoon Deep Dive Session** *Beyond the Budget: Financial Planning for School Leaders*
1:00 p.m. to 2:15 p.m.	**Afternoon Special Topic Session** *Organizing for Success: Models and Best Practices*
2:30 p.m. to 3:45 p.m.	**Afternoon Special Topic Session** *Using Data to Build and Monitor Success*
4:00 p.m. to 4:30 p.m.	**Daily Closing Session**



Tuesday, June 27 - Daily Schedule

8:00 a.m.	**Coffee Available and Sample Sharing Tables Open**
8:30 a.m. to 9:00 a.m.	**Morning Prayer, Daily Announcements and Program Information**
9:00 a.m. to 10:00 a.m.	**Keynote** *Responding to Change: Case Studies of Success*
10:00 a.m. to 10:15 a.m.	**Break**
10:15 a.m. to 12:00 p.m.	**Morning General Sessions** ▪ *Leadership: Changing Needs for Changing Times* ▪ *Leadership: New Leaders Toolbox*
12:00 p.m. to 1:00 p.m.	**Networking Lunch with Discussion Roundtables**
1:00 p.m. to 3:45 p.m.	**Afternoon Deep Dive Session** *Good to Great: Successful School Board Practices*
1:00 p.m. to 2:15 p.m.	**Afternoon Special Topic Session** *Human Resources: Hiring and Crisis Management*
2:30 p.m. to 3:45 p.m.	**Afternoon Special Topic Session** *Developing and Evaluating Personnel*
4:00 p.m. to 4:30 p.m.	**Daily Closing Session**

"What a wealth of knowledge and experience the CSM group has! Five star award!"

Jennifer Mallet, Principal
Bishop Rosecrans High School
2016 Leadership Program Participant

Wednesday, June 28 - Daily Schedule

8:00 a.m.	**Coffee Available and Sample Sharing Tables Open**
8:30 a.m. to 9:00 a.m.	**Morning Prayer, Daily Announcements and Program Information**
9:00 a.m. to 10:00 a.m.	**Keynote** *Today's Catholic School and Trends for Tomorrow*
10:00 a.m. to 10:15 a.m.	**Break**
10:15 a.m. to 12:00 p.m.	**Morning General Sessions** ▪ *Communication Strategies for Successful School Leaders* ▪ *Opportunities for Soliciting and Responding to Parent Feedback*
12:00 p.m.	**Presentation of Certificates** **Programs End at 12:30 p.m.** *Take the afternoon and explore the Monterey Bay!* *Information on activities and events is available at:* www.seemonterey.com/regions/seaside/

2 Enrollment Management and Marketing*

Who Should Attend

- Presidents
- Principals
- Pastors
- Recruitment / Admissions Staff and Volunteers
- Development Officers
- Board Members
- Diocesan Personnel
- Religious Community Leaders

Lead Program Presenters

- Dr. Julie Delaney
- Susana Garcia
- Maria Ribera
- Jennifer Trefelner

*CFRE credit available

Overview:

Marketing for mission is at the heart of programs that result in strong enrollment. This three-day program demystifies the essential concepts of marketing and enrollment management, distinguishing between the distinct phases of recruitment, admissions, and retention. Informative general sessions set the foundation for an understanding of what's needed to guide, staff, and evaluate a successful program. The variety of sessions offered allows participants to choose the types of information and topics most needed to take programs and enrollment goals to the next level.

Session Topics Offered:

- Mission, Markets and Message
- Enrollment Management 101
- Creating the Marketing Message
- The Branding and Identity Guide
- Using Social Media Marketing and Analytics
- The Role of the School Website and Video in Recruitment
- Admissions and Tuition Assistance Programs
- Enrollment Roles: Leadership, Staff, Parent and Student Ambassadors
- Enrollment Data, Admissions Funnels, Enrollment Reporting
- The Enrollment Pipeline: Growth through Personalization of the Experience

Monday, June 26 - Daily Schedule

8:00 a.m.	**Coffee Available and Sample Sharing Tables Open**
8:30 a.m. to 9:00 a.m.	**Morning Prayer, Daily Announcements and Program Information**
9:00 a.m. to 10:00 a.m.	**Keynote** *The Changing Face of Catholic Schools: The Journey from Welcoming to Belonging*
10:00 a.m. to 10:15 a.m.	**Break**
10:15 a.m. to 12:00 p.m.	**Morning General Session** *Enrollment Management Framework (single session)*
12:00 p.m. to 1:00 p.m.	**Networking Lunch with Discussion Roundtables**
1:00 p.m. to 3:45 p.m.	**Afternoon Deep Dive Session** *Enrollment 101: Research, Message, Influencers, Planning, Goal Setting and Reporting*
1:00 p.m. to 2:15 p.m.	**Afternoon Special Topic Session** *Implementing a Distinctive Marketing Message*
2:30 p.m. to 3:45 p.m.	**Afternoon Special Topic Session** *Engaging School-Wide Accountability*
4:00 p.m. to 4:30 p.m.	**Daily Closing Session**

Tuesday, June 27 - Daily Schedule

8:00 a.m.	**Coffee Available and Sample Sharing Tables Open**
8:30 a.m. to 9:00 a.m.	**Morning Prayer, Daily Announcements and Program Information**
9:00 a.m. to 10:00 a.m.	**Keynote** *Responding to Change: Case Studies of Success*
10:00 a.m. to 10:15 a.m.	**Break**
10:15 a.m. to 12:00 p.m.	**Morning General Sessions** ▪ *Mission, Markets and Message* ▪ *Visual Branding and Unified Communications*
12:00 p.m. to 1:00 p.m.	**Networking Lunch with Discussion Roundtables**
1:00 p.m. to 3:45 p.m.	**Afternoon Deep Dive Session** *Using Social Media Marketing and Analytics*
1:00 p.m. to 2:15 p.m.	**Afternoon Special Topic Session** *Digital Marketing: Website and Video Strategies*
2:30 p.m. to 3:45 p.m.	**Afternoon Special Topic Session** *Student and Parent Ambassador Programs*
4:00 p.m. to 4:30 p.m.	**Daily Closing Session**

Wednesday, June 28 - Daily Schedule

8:00 a.m.	**Coffee Available and Sample Sharing Tables Open**
8:30 a.m. to 9:00 a.m.	**Morning Prayer, Daily Announcements and Program Information**
9:00 a.m. to 10:00 a.m.	**Keynote** *Today's Catholic School and Trends for Tomorrow*
10:00 a.m. to 10:15 a.m.	**Break**
10:15 a.m. to 12:00 p.m.	**Morning General Sessions** ▪ *Events: The Enrollment Funnel vs. The Enrollment Pipeline (High School)* ▪ *Events: The Enrollment Funnel vs. The Enrollment Pipeline (Elementary School)*
12:00 p.m.	**Presentation of Certificates** **Programs End at 12:30 p.m.** *Take the afternoon and explore the Monterey Bay!* *Information on activities and events is available at:* www.seemonterey.com/regions/seaside/

"I am certainly planning on attending a future CSM program. This next time I'm bringing coworkers so we can cover more of the program tracks!"

Timothy Schroeder, Business Manager
St. Lawrence Seminary
2016 Enrollment Program Participant

3 Institutional Advancement*

Who Should Attend

- Presidents
- Principals
- Pastors
- Advancement / Development Directors
- Development Committee Members
- Board Members
- Development Volunteers

Lead Program Presenters

- Richard Burke
- Edward Barrett
- David Holquin
- Jennifer Trefelner

*CFRE credit available

Overview:

CSM's Certificate Program in Institutional Advancement will provide you with the best practices, focused strategies, and techniques to help you lay the ground work for your school's Advancement Program or to add enhancements for increased outcomes and success. At the heart of strong development programs is the forging of strong relationships. Program sessions address both people and practices, thereby continually reinforcing the concept that people respond to people, not institutions.

Session Topics Offered:

- Making the Case for Giving
- Annual Fund 101
- Online Giving
- Utilizing Social Media and Social Media Ambassadors to Grow Relationships
- Major Donor Gift Solicitation Techniques
- Comparing Roles: The Development Team and the Development Committee of the Board
- The Comprehensive Advancement Plan
- The Development Communication Plan
- Planned Giving Programs: Best Practices
- Alumni Programs
- Success Factors for Annual and Special Events

Monday, June 26 - Daily Schedule

8:00 a.m.	**Coffee Available and Sample Sharing Tables Open**
8:30 a.m. to 9:00 a.m.	**Morning Prayer, Daily Announcements and Program Information**
9:00 a.m. to 10:00 a.m.	**Keynote** *The Changing Face of Catholic Schools: The Journey from Welcoming to Belonging*
10:00 a.m. to 10:15 a.m.	**Break**
10:15 a.m. to 12:00 p.m.	**Morning General Sessions** ▪ *The Comprehensive Advancement Plan: Making the Case for Giving* ▪ *Developing the Advancement Team*
12:00 p.m. to 1:00 p.m.	**Networking Lunch with Discussion Roundtables**
1:00 p.m. to 3:45 p.m.	**Afternoon Deep Dive Session** *The Development Communication Plan: Print, Web, Electronic, Social*
1:00 p.m. to 2:15 p.m.	**Afternoon Special Topic Session** *Apps for the Development Office*
2:30 p.m. to 3:45 p.m.	**Afternoon Special Topic Session** *Online Giving, Social Media, and Leveraging an Ambassador Program*
4:00 p.m. to 4:30 p.m.	**Daily Closing Session**

Tuesday, June 27 - Daily Schedule

8:00 a.m.	**Coffee Available and Sample Sharing Tables Open**
8:30 a.m. to 9:00 a.m.	**Morning Prayer, Daily Announcements and Program Information**
9:00 a.m. to 10:00 a.m.	**Keynote** *Responding to Change: Case Studies of Success*
10:00 a.m. to 10:15 a.m.	**Break**
10:15 a.m. to 12:00 p.m.	**Morning General Sessions** ▪ *Establishing an Annual Giving Campaign* ▪ *Cultivating Donors and Securing Major Gifts*
12:00 p.m. to 1:00 p.m.	**Networking Lunch with Discussion Roundtables**
1:00 p.m. to 3:45 p.m.	**Afternoon Deep Dive Session** *Comparing Roles: The Development Team and the Development Committee of the Board*
1:00 p.m. to 2:15 p.m.	**Afternoon Special Topic Session** *Success Factors for Annual and Special Events*
2:30 p.m. to 3:45 p.m.	**Afternoon Special Topic Session** *Best Practices for Planned Giving Programs*
4:00 p.m. to 4:30 p.m.	**Daily Closing Session**

Wednesday, June 28 - Daily Schedule

8:00 a.m.	**Coffee Available and Sample Sharing Tables Open**
8:30 a.m. to 9:00 a.m.	**Morning Prayer, Daily Announcements and Program Information**
9:00 a.m. to 10:00 a.m.	**Keynote** *Today's Catholic School and Trends for Tomorrow*
10:00 a.m. to 10:15 a.m.	**Break**
10:15 a.m. to 12:00 p.m.	**Morning General Sessions** ▪ *Creating the Comprehensive Advancement Plan* ▪ *Today's Successful Parent, Alumni, and Community Relations Programs*
12:00 p.m.	**Presentation of Certificates** **Programs End at 12:30 p.m.** *Take the afternoon and explore the Monterey Bay!* *Information on activities and events is available at:* www.seemonterey.com/regions/seaside/

"Very responsive, personalized and specific. Loved it!!!"

Kathryn Day, Volunteer/Committee Member
St. Francis de Sales School
2016 Advancement Program Participant

Exceptional Catholic High School Guidance and Counseling

Overview:

Since Counseling at Catholic high schools plays an integral role in providing comprehensive services that will meet the personal, academic, and college counseling needs of its students, it is imperative that those working in this field are able to serve their students' and families' wellness needs as well as to provide up-to-date college counseling information in the changing landscape of college admissions. CSM is proud to offer this unique program designed specifically for the needs of guidance and college counselors in Catholic high schools.

Who Should Attend

- Guidance Department Chairs
- Guidance Counselors
- College Counselors
- Principals
- Assistant / Vice Principals
- Academic Deans
- Deans of Students
- Teachers

Lead Program Presenters

- Barbara Simmons

Session Topics Offered:

- Guidance and Counseling in a Catholic Setting
- Resources for Academic and Personal Counseling
- Athletic Advising
- Importance of Job Descriptions, Guidance Calendars, Profiles, Staff Meetings and Communication within the Department, within the School, and within the Community
- Models That Maximize Counselor/Student Interaction
- Getting the Most Out of Naviance: Account Setup and Management, Tools, Inventories, the College Process
- The Guidance and Counseling Office Online and in Social Media
- The College Process: Exploring, Preparing, Applying, Deciding and Affording
- Support for First Generation Students and Families
- Crisis Protocols/Referral Processes
- Creating Effective Evaluation Tools
- Growing Awareness of Resources for Counselors and Services
- Creating Professional Development Opportunities and Affiliations

Monday, June 26 - Daily Schedule

8:00 a.m.	**Coffee Available and Sample Sharing Tables Open**
8:30 a.m. to 9:00 a.m.	**Morning Prayer, Daily Announcements and Program Information**
9:00 a.m. to 10:00 a.m.	**Keynote** *The Changing Face of Catholic Schools: The Journey from Welcoming to Belonging*
10:00 a.m. to 10:15 a.m.	**Break**
10:15 a.m. to 12:00 p.m.	**Morning General Session** *Overview: Effective Counseling Programs in Catholic High Schools*
12:00 p.m. to 1:00 p.m.	**Networking Lunch with Discussion Roundtables**
1:00 p.m. to 3:45 p.m.	**Afternoon Deep Dive Session** *Structure, Schedule and Services* ▪ *Communication: External and Internal Practices* ▪ *Daily Life in the Counseling World*
4:00 p.m. to 4:30 p.m.	**Daily Closing Session**

Exceptional Catholic High School Guidance and Counseling

Tuesday, June 27 - Daily Schedule

8:00 a.m.	**Coffee Available and Sample Sharing Tables Open**
8:30 a.m. to 9:00 a.m.	**Morning Prayer, Daily Announcements and Program Information**
9:00 a.m. to 10:00 a.m.	**Keynote** *Responding to Change: Case Studies of Success*
10:00 a.m. to 10:15 a.m.	**Break**
10:15 a.m. to 12:00 p.m.	**Morning General Session** *Specialized Realms of Knowledge: The Complete Counseling Office Repertoire*
12:00 p.m. to 1:00 p.m.	**Networking Lunch with Discussion Roundtables**
1:00 p.m. to 3:45 p.m.	**Afternoon Deep Dive Session** *Using Naviance: Selecting Tools to Maximize Outcomes* ▪ *Best Practices in Account Use and Management* ▪ *Inventories, Tools and the College Process*
4:00 p.m. to 4:30 p.m.	**Daily Closing Session**

"Thank you for a professional and thought-provoking experience. Networking with other educators was one of the highlights of this conference!"

Peggy Boon, Dean of Faculty and Academics
Saint Gertrude High School
2016 Guidance & Counseling Program Participant

Wednesday, June 28 - Daily Schedule

8:00 a.m.	**Coffee Available and Sample Sharing Tables Open**
8:30 a.m. to 9:00 a.m.	**Morning Prayer, Daily Announcements and Program Information**
9:00 a.m. to 10:00 a.m.	**Keynote** *Today's Catholic School and Trends for Tomorrow*
10:00 a.m. to 10:15 a.m.	**Break**
10:15 a.m. to 12:00 p.m.	**Morning General Session** *Ensuring Student and Counselor Success: Resources, FAQs, Evaluation*
12:00 p.m.	**Presentation of Certificates** **Programs End at 12:30 p.m.** *Take the afternoon and explore the Monterey Bay!* *Information on activities and events is available at:* www.seemonterey.com/regions/seaside/

Welcoming Hispanic Families and Developing Cultural Competencies

Who Should Attend

- Presidents
- Principals
- Pastors
- Board Members
- Teachers
- Diocesan Superintendents/ Vicars of Education
- Diocesan Personnel
- Directors of Hispanic Ministry
- Business Managers

Lead Program Presenters

- Dr. Ursula Aldana
- Dr. Austin Conley
- Maria Ribera

Overview:

This three-day program informs, supports, and inspires school leaders in remaining focused on our Catholic School mission and ensuring our schools are truly a place for all. From Catholic education's inception in the United States, Catholic schools were established for the immigrant population and the leadership was successful at building enrollment with the high European immigrant populations. At this point in United States history, Catholic education is in need of innovative change, especially in regard to attracting the Latino community, the largest Catholic group, to Catholic schools. Innovative and pragmatic strategies will be the basis for this program while enhancing marketing efforts, organizational functioning, effectiveness, planning, communication, and financial management are the goals. Understanding of leadership styles, community and school assessment, and related consideration for success are explored and discussed to provide strategies and solutions to support a "best fit" approach to responding to the call to lead, and to serve. Participants will be actively engaged and will leave with a plan for impacting their sites or organizations.

Session Topics Offered:

- Understanding Changing Demographics: Data and Research
- Welcoming and Belonging: Stages of Development
- Dealing with Racial Tensions
- Communication Strategies to Facilitate Cultural Change
- Involving Stakeholders in Decision-Making
- Case Studies of Success
- Effective Marketing Strategies for All
- Converting Strategies into Practice

Monday, June 26 - Daily Schedule

8:00 a.m.	**Coffee Available and Sample Sharing Tables Open**
8:30 a.m. to 9:00 a.m.	**Morning Prayer, Daily Announcements and Program Information**
9:00 a.m. to 10:00 a.m.	**Keynote** *The Changing Face of Catholic Schools: The Journey from Welcoming to Belonging*
10:00 a.m. to 10:15 a.m.	**Break**
10:15 a.m. to 12:00 p.m.	**Morning General Session** *Catholic School Environment & Culture in an Increasingly Diverse Church: ▪ History ▪ Deep Dive in Data on Schools ▪ Case Study*
12:00 p.m. to 1:00 p.m.	**Networking Lunch with Discussion Roundtables**
1:00 p.m. to 3:45 p.m.	**Afternoon Deep Dive Session** *Creating the Welcoming Environment in Catholic Education and Stakeholder Involvement: ▪ Stages of Development ▪ Considerations for Different Cultures ▪ Racial Tensions ▪ School Site Scenarios*
4:00 p.m. to 4:30 p.m.	**Daily Closing Session**

Welcoming Hispanic Families and Developing Cultural Competencies

Tuesday, June 27 - Daily Schedule

8:00 a.m.	**Coffee Available and Sample Sharing Tables Open**
8:30 a.m. to 9:00 a.m.	**Morning Prayer, Daily Announcements and Program Information**
9:00 a.m. to 10:00 a.m.	**Keynote** *Responding to Change: Case Studies of Success*
10:00 a.m. to 10:15 a.m.	**Break**
10:15 a.m. to 12:00 p.m.	**Morning General Session** *Budgeting and Finance in Relation to an Inclusive and Welcoming Environment*
12:00 p.m. to 1:00 p.m.	**Networking Lunch with Discussion Roundtables**
1:00 p.m. to 2:15 p.m.	**Afternoon Special Topic Session** *Marketing and Outreach: Practical Strategies* *▪ Grassroots and Formal Initiatives*
2:30 p.m. to 3:45 p.m.	**Afternoon Special Topic Session** *Conversion of Strategies to Practice* *▪ Scenario Studies*
4:00 p.m. to 4:30 p.m.	**Daily Closing Session**

Wednesday, June 28 - Daily Schedule

8:00 a.m.	**Coffee Available and Sample Sharing Tables Open**
8:30 a.m. to 9:00 a.m.	**Morning Prayer, Daily Announcements and Program Information**
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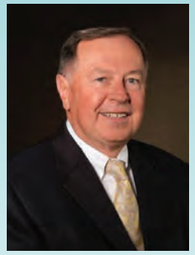
10:00 a.m. to 10:15 a.m.	**Break**
10:15 a.m. to 12:00 p.m.	**Morning General Session** *Creating the Plan: From Welcoming to Belonging*
12:00 p.m.	**Presentation of Certificates** **Programs End at 12:30 p.m.** *Take the afternoon and explore the Monterey Bay!* *Information on activities and events is available at:* www.seemonterey.com/regions/seaside/

Catholic School Management Staff Bios



Richard Burke

Maria Ribera

Robert Bailey

Edward Barrett

Richard Burke
CSM Senior Executive Consultant

Richard was founder and president of Catholic School Management, the preeminent Catholic school consulting firm which has provided consultative guidance, publications and training programs for parish, private and diocesan Catholic elementary and secondary schools and parishes since 1973. He has 45 years of experience as a consultant, board member and business manager providing workshops, seminars and direct consulting services to schools, parishes, religious communities, dioceses and school boards. He served on the Adjunct Faculty of the Graduate School of Education at Boston College, served as both a lecturer and instructor for the Institute for Catholic Educational Leadership (ICEL) at the University of San Francisco, served as Business Planning Coordinator for Catholic schools in the Archdiocese of Hartford and also served as a consultant to the Archbishop's Study Committee on Parish Councils in the Archdiocese of Hartford.

Maria Ribera
CSM President and Executive Consultant

Maria Ribera is President, COO, and Executive Consultant for Catholic School Management. Maria has been associated with Catholic education since 1992 when she first started her teaching career. As an educator, Maria has been a classroom teacher in the Catholic K-12 setting and has held administrative roles as Assistant Principal/Dean of Studies, Interim Principal, Academic Technology Coordinator, College Counselor, and Academic Counselor. Her experience includes extensive work in teacher supervision and evaluation, curriculum development, professional development design and delivery, and technology integration and planning. Prior to a career in Catholic education, Maria worked in the design and marketing industry as a graphic designer and in visual merchandising.

Since 2001, Maria has been working with Catholic School Management providing consultative guidance in various areas. In the administrative and academic arenas, she has worked directly with schools for administrative mentoring, strategic planning, technology planning, development of research skills curriculums, implementation of curriculum mapping, and evaluation of guidance and counseling programs. She coordinates CSM's distinctive Institutional Assessment and Strategic Management and Development Programs while also providing leadership and vision to client work in strategic planning, enrollment management, marketing and communication. She is a lead presenter for CSM seminars and workshops and has been a speaker at NCEA and ISTE among other conferences.

Having grown up in New York, Maria now resides in California. Maria holds a Bachelor of Arts degree from Dartmouth College, a Master's of Science in Curriculum, Instruction and Technology from Nova Southeastern University, and Graduate Certification in Administration and Supervision through Johns Hopkins in collaboration with the International Society for Technology in Education (ISTE). Maria also holds California Clear Single Subject Teaching Credentials in Art and Spanish.

Robert Bailey
CSM Adjunct Consultant

Robert has been a junior high and high school administrator for over 30 years working in a broad spectrum of roles including faculty member in various departments, Dean of Students, Coach, Religious Studies Department Chair, Vice Principal for Student Life, and most recently Vice Principal for Strategic Initiatives at Justin-Siena High School in Napa, California. He brings a breadth of knowledge that spans the design, project management and building of school facilities to the design and implementation of new curriculum. He has worked in student life programming, combining student activities and campus ministry in a manner that promotes a lived experience of our Catholic mission for all students. He was honored with the Distinguished Lasallian Educator Award and recognized by the Diocese of Santa Rosa with the Heroes of Faith Award.

Catholic School Management Staff Bios

Edward Barrett
CSM Senior Development Consultant

Edward currently serves as Director of Institutional Advancement for Providence Catholic High School, New Lenox, Illinois. Since 1990, he has built a successful comprehensive Institutional Advancement program at Providence Catholic High School, including extensive communications and marketing programs, coordination of all fundraising programs, student enrollment programs, annual giving and endowment growth programs, and he conducted a successful $3 million capital campaign. Prior to 1990, he served as Director of Admissions and Assistant Director of Development for St. Rita High School, in Chicago. He holds a Bachelor of Science degree in Speech Communication from Southern Illinois University, Carbondale, Illinois. He has received training for institutional development by Catholic School Management, Catholic School Parish Development (CSPD), the Omaha Development Institute and the Bishop John R. Gorman Institute for Leadership in Catholic Education.

Dr. Lois Cavucci
CSM Adjunct Search Consultant

Lois is an experienced Catholic school leader who most recently served Catholic education as the founding president and CEO of Lumen Christi Catholic Schools, a system of schools comprised of six elementary Catholic schools and four Early Childhood Learning Centers within the Diocese of Youngstown, Ohio. She provided leadership of the school system in order to achieve the fullest attainment of the mission of the system, while taking responsibility for its personnel and budget, educational and development programs, enrollment, business affairs, and facilities.

She is an adjunct professor at the University of Dayton where she teaches graduate level courses in Qualitative and Quantitative Action Catholic Research and Educational Leadership classes. She also served as an adjunct professor at Walsh University in Canton, Ohio, where she taught graduate level courses in curriculum, action research, and philosophy of education.

Susana Garcia
CSM Adjunct Consultant

Susana specializes in enrollment management, marketing, and social media planning. She originally began her career in Catholic education as a Religious Studies teacher, and holds a Master's of Arts in Spirituality from Santa Clara University. Her leadership roles have included Religious Studies Department Chair as well as Director of Campus Ministry and Retreat Coordinator. Her passion for making Catholic education come alive for students extends into her ability to tell the stories that show why families should choose a Catholic education. Since 2011, Susana has been directing enrollment programs at Notre Dame High School in San Jose, California, and currently holds the title of Vice Principal for Enrollment and Public Relations. Fluent in Spanish and Portuguese, she brings a strong understanding of diversity and culture to her work with schools.

Barbara Simmons
CSM Adjunct Consultant

Barbara has been associated with educational institutions and positions in business organizations her entire career. She taught English at the secondary level, in both public and private schools in Massachusetts, and has been a college counselor and director of college counseling at two Catholic secondary schools in California, Bellarmine College Preparatory and Notre Dame High School. In the 1970s, she served as the training and development manager for The Gap Stores, Inc., creating and presenting communication skills workshops, time management seminars and performance review seminars to management at corporate and store levels. She also worked on the college and university side of education, serving as assistant director of admissions at Wellesley College, assistant director of undergraduate admissions at Santa Clara University and Santa Clara's director of admissions for graduate programs in counseling psychology and education.

Jennifer Trefelner
CSM Adjunct Consultant

Jennifer has been the Director of Institutional Advancement at John Carroll High School in Fort Pierce, Florida, since 2004. She currently manages job duties including the integrated functions of fundraising and friend-raising, public relations and media relations, marketing and advertising, electronic communications and website development, community and parent relations, and alumni cultivation and institutional planning. She works on a part-time basis directly for the Diocese of Palm Beach as the Online Communications Consultant for the Office of Catholic Schools. Through this position, she serves as a resource to help assess, develop and maintain online communication tools designed to support initiatives and activities undertaken by the schools and that of the Diocese of Palm Beach's Office of Catholic Schools.

Dr. Lois Cavucci

Susana Garcia

Barbara Simmons

Jennifer Trefelner

Meet the CSM Staff

The team at Catholic School Management numbers over 30 dedicated and qualified professionals working on behalf of Catholic education. Our consultants represent over 300 years of collective experience in Catholic schools, with an average experience of over 15 years. Our consultants are highly qualified in their specific fields and travel all over the United States to meet and work with Catholic schools.

Leadership Team

Richard J. Burke
CSM Founder and Senior Executive Consultant

Maria J. Ribera
President of Catholic School Management and Executive Consultant

Staff

Deborah L. Papa
Office Manager

Consulting Team

Jacqueline Abrahams
Adjunct Consultant

Robert A. Bailey
Adjunct Consultant

Edward J. Barrett
Adjunct Consultant

Joseph W. Bracco
Adjunct Consultant

Lois J. Cavucci, Ed.D.
Adjunct Consultant

Sr. Carol Cimino, SSJ, Ed.D.
Adjunct Consultant

Michael M. Denison
Adjunct Consultant

Lois K. Draina, Ph.D.
Senior Administration Consultant

Donald L. Edwards, Ed.D.
Adjunct Consultant

Rachel L. Ellingson
Adjunct Consultant

Richard E. Feitel
Senior Development Consultant

Susana Garcia
Adjunct Consultant

Gary J. Gelo
Adjunct Consultant

Frank A. Glowaty
Adjunct Consultant

Stephen J. Hammond
Adjunct Consultant

Susan R. Hoffman
Senior Development Consultant

Joseph D. Hollowell
Adjunct Consultant

Jennifer C. Kensel
Director of Planning Services and Administrator Search Division

Fr. Richard J. McGrath, OSA, Ph.D.
Adjunct Consultant

Aline P. Norwood
Adjunct Consultant

G. Joseph Peters
Adjunct Consultant

Thomas H. Posnanski
Adjunct Consultant

Kim R. Pryzbylski, Ph.D.
Adjunct Consultant

Mary Beth Riley
Adjunct Consultant

Mary Lou Schoone
Adjunct Consultant

Barbara F. Simmons
Adjunct Consultant

Jennifer M. Trefelner, APR, CPRC
Adjunct Consultant

Robert S. Webb
Adjunct Consultant

Nicholas M. Wolsonovich, Ph.D.
Adjunct Consultant

Frederick Zilian, Ph.D.
Adjunct Consultant

A division of Christian Brothers Services

CATHOLIC SCHOOL MANAGEMENT

2017 SUMMER CERTIFICATE PROGRAM REGISTRATION FORM

Registrant Name _____ Title _____

Institution _____ Diocese _____

Level: Elementary ___ Secondary ___ K-12 ___ Other ____

Type: Diocesan ___ Sponsored ___ *(list sponsoring organization)* _____ Other _____

Address _____

City _____ State _____ Zip _____

Phone _____ Registrant E-mail _____ School Website _____

Summer Mailing Address for Registrant (if different from address above)

Address _____ City _____

State _____ Zip _____ Registrant E-mail _____ Phone _____

PROGRAM COSTS

Early Bird Registration: Before April 1, 2017	Regular Registration: April 1 – May 15, 2017	Late Registration: After May 15, 2017
$750	$799	$875

Please mark with an "X" the program you will be attending. See Program Brochure for daily session topics.

Programs	Monday – Wednesday, June 26 - 28, 2017
Marketing & Enrollment Management	☐
Successful Leadership	☐
Institutional Advancement	☐
High School Guidance and Counseling	☐
Welcoming Hispanic Families & Developing Cultural Competencies	☐

☐ **Enclosed is my $100 deposit to reserve my space in the program noted to the left.** ***I understand payment in full is due by May 15, 2017.***

☐ **Enclosed is my payment in full for**

_____

MEALS, LODGING, EVENING ACTIVITIES & DISCOUNTS

Catholic School Management has secured special pricing on hotel rooms at the conference location:
Embassy Suites Monterey Bay Seaside, 1441 Canyon Del Rey, Seaside, CA, 831.393.1115
CSM Room Block Pricing: $189/night for single and double occupancy, includes Complimentary cooked-to-order breakfast and evening reception. **Limited room availability ends May 20, 2017 - call early!**

Complimentary activities provided for all CSM Summer Certificate Program attendees include an evening reception and dinner on Monday night, plus a special wine tasting event on Tuesday night on the Monterey Bay!
Morning Coffee and Lunch Included for all Participants on Monday and Tuesday!

Group discounts for individual schools begin at $50 for sending 3 or more attendees, with additional offers for larger school/diocesan groups. As a division of Christian Brothers Services, Catholic School Management offers a discounted rate for anyone attending from a Lasallian school. Contact the CSM Office for more information.

A deposit of $100 must accompany this form. Make all checks payable to Christian Brothers Services.
Mail form and deposit to: Summer Certificate Programs, Catholic School Management, PO Box 4071, Madison, CT 06443-4071
If you would like additional information, please contact Catholic School Management at:
Phone: 203.421.5169, Fax: 203.421.5172, E-mail: CSMoffice@cbservices.org

Early Bird Discounts
Register by April 1

2017 Summer Certificate Programs

June 26 - June 28, 2017

Who Should Attend

- Administrative Team Members
- Advancement / Development Directors
- Board Chairs and Members
- Business Managers
- Development Committee Members
- Development Officers
- Diocesan Personnel
- Diocesan Superintendents / Vicars of Education
- Guidance and College Counselors
- Hispanic Ministry Staff
- Pastors
- Presidents
- Principals
- Recruitment / Admissions Staff and Volunteers
- Religious Community Leaders
- School Administrators
- Teacher Leaders

CSM

A division of Christian Brothers Services

Catholic School Management
P. O. Box 4071
Madison, Connecticut 06443
catholicschoolmgmt.com
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