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TAKING STOCK

**A discussion paper on some of the challenges and opportunities
for Loyola High School**

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Preamble

Loyola High School is in “good health”. It is a school that is in demand, it possesses an excellent reputation, it is blessed with extremely competent and dedicated teaching and support staff and has over the years, benefitted from very strong, capable and respected administrative leadership. Supporting all this is a decades-deep phalanx of alumni, former and current parents and friends that has consistently provided Loyola with generous and enviable financial and volunteer support whenever required.

So, “why fix it if it ain’t broke?”

In an article published in America (The National Catholic weekly) in 1985, entitled “Notes on Jesuit Education”, Fr. John Donohue, S.J., wrote the following:

“Schools exist to help pass on a people’s way of life, and since ways of life are continually and sometimes rapidly changing, schools must also change or disappear. They must conserve what is valuable without becoming stuck in the past. Newman’s celebrated sentence in *Development of Christian Doctrine* fits education as well as everything else: ‘In a higher world, it is otherwise; but here below to live is to change, and to be perfect is to have changed often.’”

Loyola High School has been true to this maxim – it has changed often and dramatically over the last forty years. For example,

- it built a new gym on the south side of Sherbrooke Street and in 1992, inaugurated its new school on the same side of the street.
- it conducted a major Capital Campaign at the beginning of the new millennium that led to the construction of an additional wing to house classrooms, science labs and a 750-seat auditorium. In so doing, it successfully reduced class size significantly (from an average of 32 students per class to 25 students per class).
- in accordance with its New Technologies approach developed some ten years ago, it introduced iPads for every student in September 2011.
- it introduced a vigorous science/electronic/robotic activity that has seen Loyola High School students compete successfully in major local, national and international competitions.
- it has built up an extremely varied and robust Arts program in recent years that is characterized by the wide range of diversity offered (band, choir, arts, etc.), the significant number of students participating in these activities and the quality of the art and music produced.

Equally impressive is that the High School has managed to accomplish all these changes while coping at the same time with a significant growth in student population (going from an overall student body of 650 to 750, a 15% growth). In managing this growth – hiring of additional

teachers and staff – the school has managed to maintain its character and identity and above all, its accessibility to all deserving students, thanks in no small way to the great work done by the Foundation and its donors over the years. In effect, tuition fees that were in the \$2,000 range fifteen years ago will be close to \$7,800 dollars for the 2012-2013 academic year and throughout this period of tuition increase, the Foundation has provided support to 15% plus of the High School’s student population.

Loyola High School has been no less diligent in attending to its core mission and curricular offerings. In 1981, Fr. Len Altilia, S.J., launched a review process that was entrusted to four members of faculty. Over a four year period, this Steering Committee consulted interested parties, conducted evaluation and assessment sessions and submitted in 1986, the results of their efforts. Some ten years later, Fr. Eric Maclean, S.J., launched a similar process entitled: *“Reflecting on today...Preparing for tomorrow”*. This seven person-committee that led this exercise, chaired by Dr. Ron Smith (and of which Nadine Gut and Patrick Shea were members as well), conducted an extensive survey, distributed questionnaires to all major elements of the Loyola High School “family” and conducted focus groups, all with a view to evaluating the strengths and improvements required to enable the High School to continue to excel in its fundamental mission. This committee tabled no fewer than 51 recommendations which served as guidelines, to a certain degree, for several of the curricular changes effected these last ten years.

In summary, the High School has evolved with the times in many respects, as evidenced by the activity reported here above. And as it has, in the past, been aware and sensitive to evolving situations and the need to address and make the most of these, Loyola High School now intends to take stock of its overall situation as it moves towards the future.

The Challenges

There are several challenges, both internal and external, that are present or looming not too far off into the future. In no preferred order, they are:

Governance

In the last few years, the Jesuits have added more legislative and executive strength to the High School’s Board of Governors. Although the Jesuit Board still retains ultimate authority in certain areas, the High School Board of Governors has much more say in overseeing the overall “health” of the School and as such, is much more accountable for the proper governance of the School. It is several levels above the initial Board constituted in 1996 and whose function was more advisory in nature. The granting of increased authority and responsibility to the High School’s Board of Governors is a clear manifestation of the Jesuits’ resolve to work more closely with the lay community. In this spirit and with a view to preparing for the future, the time is opportune to discuss the presence and role of the Jesuits at Loyola High School in the years ahead for it

touches upon the very essence of what constitutes a Loyola High School education. It is obvious that the final say in the matter rests with the Jesuit community – however, an engaged discussion at this point would be beneficial and the Board of the High School can conceivably initiate it with the Jesuit community – in the interests of good governance.

At the same time, it would be useful to examine the governance procedures as regards the other organizations that support the mission of the High School, i.e., the Parents' Association, the Alumni Association, the Foundation and the Mothers' Guild. To what extent do these organizations have governing by-laws, to whom are they accountable, what governance mechanisms are in place to support proper operations and how do their governance mechanisms and corporate statutes interface with those of the High School?

Finance

In the 1974-1975 academic year, Loyola High School had an overall operating budget of just over \$900,000 and 65% of its revenue came from the government. In 2009-2010, the High School's budget was just over \$8M dollars and government subsidy represented 38% of the High School's revenue. Indeed, statistics indicate that parents have over the last twenty years assumed a more and more important load of the High School's revenue stream; coupled with donations from outside donors, these two amounts constitute year after year about 60% of the High School's revenue. More specifically, if in 1974-1975 the tuition fees and activity fees paid by the parents accounted for 25% of the revenue, in 2009-2010, those same charges now accounted for 55% of total revenues.

Is Loyola High School pricing itself outside of the market? Are we closing the doors to students and to constituencies that we have served for generations as a result of these increased costs? Or is Loyola High School not charging enough – what is the real cost of providing a quality Catholic and Jesuit education in 2012, when the facility Loyola High School now occupies is four times greater than the space occupied in the 70s, when the options offered have multiplied by a significant factor and when the teacher-student ratio, overall, is 1:14? Are there any discernible patterns that have taken shape over the last ten to fifteen years that can guide us in developing a model for what to expect over the next five to ten years as regards both revenue and expense streams? What provisions can or should be made in our current mode of financing to enable the High School to cope with an unexpected major expense, or an equally unexpected downturn in enrolment?

Demographics

In 1974-1975, the English-speaking Catholic sector of the Montreal Catholic School Commission alone had an enrolment of 20,000 students in its elementary schools. Coupled with the enrolment in the elementary English sectors of the other Catholic School Boards on the island of Montreal at that time, there were close to 40,000 students in English elementary

Catholic schools then. Add to these figures those enrolled in the elementary schools of the Protestant School Board of Greater Montreal (25,000) and the Lakeshore School Board (10,000), there were close to 75,000 children enrolled in English elementary education on the Island of Montreal. Linguistic school boards replaced confessional school boards in 1998. Two linguistic boards whose combined elementary school population is in the vicinity of 25,000 students replaced Montreal's English-speaking Catholic and Protestant populations that once were serviced by six Catholic Boards and two Protestant Boards. In essence, the feeder schools for Loyola High School's future enrolments have a much smaller population.

In addition, the prospect of increased enrolment in the English elementary sector is non-existent given the provisions and the application of Bill 101. Though Loyola does have students that come from Laval and the South Shore, the vast majority still comes from the island of Montreal.

Applications and enrolments over the last three years indicate as well that our feeder sources are many and diffuse. With the exception of four elementary schools that have provided us with 18, 14, 12 and 11 student applications respectively, the three hundred-odd applications for admission received over each of the last three years have come from no fewer than 131 elementary schools.

In essence, the feeder pool has diminished considerably over the years (with little or no possibility of growth) and within this pool, apart from the four exceptions mentioned above, there is no significant major provider of students.

The major competition for the Loyola High School clientele is Royal West Academy (Montreal West) and Vincent Massey High School (north-east Montreal) – both are public schools with excellent academic reputations. What is the possibility/probability that other schools of this nature will appear gradually in the public sector, particularly in those geographic areas where significant portions of our students currently reside?

It is a fact there is no other private Catholic all-boys high school and in that sense, Loyola has no competition. But will this always be the case? Moreover, what would be the impact on Loyola High School if either Queen of Angels Academy or Sacred Heart High School decided to go co-ed? Should Loyola High School look at going co-ed, as has been suggested in the past? Should Loyola High School consider a strategic alliance with one or several of the all-girls high schools that could allow for co-ed education in certain subjects and activities?

Alumni and Development

The Loyola High School experience has fostered deep and lifelong ties among students graduating from the same cohort and among all students towards the institution that so marked their educational and personal development. This level of engagement goes beyond the physical environment which was and is Loyola High School and as well, beyond a particular educational process. Rather, this level of engagement and loyalty is due to the personal investment which decade after decade, Jesuits, lay teachers and administrators and support staff has demonstrated

for the students in the school. The level of caring for the person, the *cura personalis* is not only one of the objectives to which the Jesuits and the staff attend, it is something which they have truly lived out over the decades and which has left its imprint on every single graduate. It is no wonder then that the alumni have been so supportive of the school over the years. Neither is it any wonder that this has generated as well, respect and support for the school from the families of those students who attended Loyola. The goodwill towards the school is deep and it is solid, which begs the question as to whether it has yielded the fullness of its potential in terms of volunteer and financial support.

As mentioned previously, the School has been successful in garnering support from its alumni and related constituencies over the years. Funds were raised successfully, for example, both to help build the new school in 1992 and then again to support its expansion in 2004, the latter Campaign successfully raising over 13 million dollars. In fact, according to the T3010 reports made public by Revenue Canada, Loyola High School has averaged just over 1 Million dollars in charitable donations over the last five years. These funds have helped subsidize the education of worthy students at Loyola High School, have helped support priority projects put forward by the school and have helped build the Loyola High School Foundation endowment to 6 Million dollars.

These are interesting and extremely encouraging results – but in the Jesuit spirit of seeking the *magis*, that is, taking things a step further, can this figure be increased, should it be increased? The annual participation rate of alumni making donations to the High School is in the order of 16%. The potential for increased participation is obvious but as getting there may very well engender additional cost, or investment, how does the Foundation best approach this challenge?

Currently, the Alumni and Development operations are run collaboratively but independently of each other. Should this model be re-examined with a view to providing the optimal organizational structure for the operations of the Alumni Association and the Foundation?

What is the interface between the High School Board and the Alumni and Foundation Boards in terms of reviewing and confirming the High School's immediate, mid and long-term needs requiring the Foundation's financial support?

In terms of volunteer support, is the High School making the best use of the resources available to it among its alumni and supporter bases? Is there a sectorial database to track our alumni and support leadership in the political, social, cultural and economic spheres on a multi-generational basis?

Every year, reunions are held for classes celebrating anniversaries (5, 10, 15 etc.). Are we leveraging this event to enhance and consolidate our alumni network? Would it be worth the effort and investment to hold a Gala event intended not only to showcase Loyola to Loyola, but especially to showcase Loyola to the external community?

Given the likely scenario that the proportion of costs borne by the parents will increase as government subsidies decrease (slowly or suddenly) and as the High School adjusts its offerings and technological support systems in order to remain competitive, additional pressure will be put on the Alumni Association and on the Foundation to come to the support of parents and of the school. What do we estimate these costs to be over the next five to ten years and what strategies are envisaged to increase the requisite philanthropic support?

Communications

More than ever, communications is vital to the health of organizations; communications not only with the outside world, but internal communications as well. In this respect, the advent of new technologies, the changing form and content of inter-personal and organizational communications, the importance of “brand” recognition to an organization’s visibility and viability pose interesting challenges to Loyola High School. There is, as well, the whole issue of education delivery and the internet – e-learning – which has become a standard and adopted way of pursuing an education for an increasing percentage of university and pre-university students. Prestigious universities such as Harvard, MIT and Stanford have begun to put their courses on the web. How all this impacts the traditional mode of education which has prevailed over the last thousand years remains to be seen. But it is quite obvious that a set time in a given physical place are no longer immovable characteristics of education and learning – at all levels. There is no doubt this will affect, eventually, Loyola High School’s educational paradigm and it is in the school’s interests to lead, rather than react, in managing this momentous transition.

Currently, there is a wide diversity of print and electronic information produced and disseminated to the major constituents of the Loyola High School community. Research and archives is responsible for the production of the Student Handbook and oversees the final publication of the Yearbook, the Alumni Association communicates with its membership via the Loyola Newsletter three times a year, the Development Office distributes an e-mail missive four times a year to its constituency, the Parents’ Association distributes a newsletter twice a year...the list goes on. In addition, Loyola High School has a web site on which most of the institutional information is displayed and a good portion of the above-mentioned material is posted as well.

For the most part, all of these communication initiatives are initiated, produced and disseminated independently– there is no central point through which all communication messages are reviewed and vetted for consistency, or through which the coordination, the complementarity and the timing of these different messages are managed.

On another note, the use of electronic means of communication for gathering information from parents is still fairly limited. There is a series of information sheets mailed out to parents and which they have to complete and return. In effect, although our students are for the most part

texting and twittering, we rely essentially on traditional communication modes to reach our various audiences and in particular, our students' parents.

As far as communicating with the wider external community, especially French Québec, positioning the High School in the greater Montreal and Quebec communities, providing the local daily and weekly media with stories of interest, attempts are made but the results are mixed.

Each of these challenges is vital for the future of the school. Loyola High School need not compete with McGill for international exposure; it cannot, however, be regarded simply as that English-Catholic High School in Western NDG, run by the Jesuits, most of whose students come from the West Island. Loyola High School has produced and continues to prepare the leaders of our community, our province and our country in various spheres of activity – it needs to be recognized for that. For such recognition will not only strengthen its “brand”, it will consolidate its positioning as a vibrant and major player in Montreal’s English-speaking Catholic community that has successfully evolved and developed over the years as well as contributing to Montreal, Quebec and Canadian society.

West Broadway Street Project

The High School was extremely successful in its last Capital Campaign due to the generosity of its donors, the strength and commitment of its leadership but above all, because it had a very strong and compelling case for support – to improve the quality of education through the reduction of class sizes and to increase the quality of life for the High School overall by providing additional space for classrooms, for recreation and for gathering purposes. An equally compelling case for support will help drive the success of the next Capital Campaign in support of Loyola’s continued development that includes the realization of the West Broadway street project.

Discussions are continuing with regard to the activities to be conducted in the new facility and there are two generally accepted principles guiding the process: first, that the activity will be grounded in what Loyola knows best, that is, education and learning; second, that the nature of the activities offered in this new facility will bear witness to Loyola High School’s unwavering commitment to serving the community.

The determination of these two principles leads to additional questions: how will these activities be funded? What additional resources are required? Should partnerships with educational-delivery partners for children and youth be envisaged? Does the service have to be offered exclusively on-site or can a wider reach be achieved through electronic forms of delivery, i.e. e-learning and/or video-conferencing? Which community do we intend to service - the local geographic community, the English-speaking Catholic community of Montreal? What about the dispossessed, the increasing elderly community, the growing immigrant and refugee communities in Montreal?

It is safe to say that whatever will eventually be offered in the West Broadway Street will impact, directly and indirectly, what happens in the High School. The dots on the line that link the High School with the West Broadway project need to be clear for the purposes of the Campaign. For prospective leadership and major donors to the Campaign will want not only to see but as well to understand how this new facility and the fundraising effort required for its realization fit overall with the vision and mission of the High School for the mid and long-term future.

Next Steps

Though there may be others, these are the main challenges and questions the High School needs to address in moving forward. The question is how will this be done, and over what time period? Should the High School embark upon a “Strategic Planning” process and if so, what has to be done to assure the full participation and the constructive engagement of those key segments of the Loyola community?

Or instead, should a one-day retreat to look at these issues be organized, with adequate provision for feedback from all major stakeholders and appropriate follow-through?

Or again, rather than engage in a time-consuming process, should the High School structure Task Forces to look at each of these issues and let each of these task forces proceed at their own respective paces, so long as in the final analysis, those adjustments that have to be made are indeed effected?

Are there additional alternatives that can be considered in deciding how to conduct this self-evaluation and review exercise?

These are the questions that merit discussion and input. And indeed, now is the best time to start examining these issues precisely because we are in good health and in control of the agenda. It is in this spirit, then, that the High School brings together its internal and external leadership to engage the discussion.