CATHOLIC SCHOOLS FOUNDATION


Fall Webinar
September 23, 2020
10:00 AM
Objectives

- To outline CSF processes and policies
- To communicate effectively in order to facilitate successful partnerships
Agenda

- Who We Are
- COVID-19 Updates
- Key Dates
- Communications
- Grant Applications
WHO WE ARE
CSF Mission

The Catholic Schools Foundation changes lives by providing families with demonstrated financial need an opportunity to give their sons and daughters a quality education, focused on Christian values and character formation at Catholic Schools located throughout the Archdiocese of Boston, regardless of race, religion, ethnicity or gender.
FY20 School and Student Support

- 4,641 Scholarships
- $10.1M Scholarship Support
- $1.5M Program Support
- 87 Schools

5 Year Scholarship Allocation
Our FY20 Supporters

- $8.4M Annual Fundraising
- $2.5M ICSF Gala
- Approximate 1,000 donors
- 7+ Multi-channel solicits
- 5+ Annual events
A student...

• whose life is impacted significantly by a Catholic education,

• is unable to attend a Catholic school without financial assistance,

• has an average total family income of approx. $53,000 or less for a family of four,

• receives an award that significantly contributes to the family’s financial obligation.
CSF Scholarship Recipient Profile

- Student Ethnicity
  - 34% Hispanic
  - 33% African American or Black
  - 20% Caucasian
  - 13% Other

- Student Religion
  - 74% Catholic
  - 22% Other Christian
  - 4% Other Non-Christian

- Single-Parent Family
  - 63%
CSF Staff

- Mike Reardon, Executive Director
- Sue Gartside, Office Manager
- Megan Adzima, Director of Allocations and Partnerships
- Christine Lattin, Allocations and Partnerships Associate
- Gina Rindfleisch, Director of Development
- Samantha Abate, Marketing/Communications Specialist
- Zach Creeden, Annual Fund and Partnerships Manager
- Yearam Kang, Data Manager
5 Year Vision

Strengthen enrollment and school sustainability through focused scholarship and program investments while implementing new fundraising strategies.

- Provide an additional 1,000 students with a high quality Catholic education.
- Increase operational strength of schools through collaboration.
- Ensure 100% of donations go directly to scholarships and programs.
Focus of Scholarship Funding

- High concentration of in-need students
- High concentration of students from in-need communities
- Funding positively impacts the students and the schools
- Effective, regional partnerships with Catholic high/elementary schools
- Receive CSF scholarship funding through CSF grant process
- Significant portion of CSF scholarship funding directed to these schools
STATE OF THE FOUNDATION UPDATE
State of the Foundation Recap

- Shared the state of the foundation with school partners September 2019
- Engaged in discussion on how CSF can most effectively partner with schools
- Solicited feedback on CSF’s priorities
Unmet Need

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Aid</td>
<td>46%</td>
</tr>
<tr>
<td>Facilities/Space</td>
<td>12%</td>
</tr>
<tr>
<td>Teacher Pay</td>
<td>9%</td>
</tr>
<tr>
<td>Competitive School Programs</td>
<td>33%</td>
</tr>
<tr>
<td>Facilities/Space</td>
<td>12%</td>
</tr>
<tr>
<td>Operating Expenses</td>
<td>9%</td>
</tr>
<tr>
<td>Teacher Pay</td>
<td>9%</td>
</tr>
<tr>
<td>Student Retention</td>
<td>12%</td>
</tr>
<tr>
<td>Business Manager</td>
<td>9%</td>
</tr>
<tr>
<td>Nurse</td>
<td>9%</td>
</tr>
<tr>
<td>Guidence Counselor</td>
<td>9%</td>
</tr>
<tr>
<td>Special Education</td>
<td>9%</td>
</tr>
<tr>
<td>Technology</td>
<td>9%</td>
</tr>
<tr>
<td>Development</td>
<td>9%</td>
</tr>
<tr>
<td>Operating Expenses</td>
<td>9%</td>
</tr>
<tr>
<td>Transportation</td>
<td>9%</td>
</tr>
</tbody>
</table>

*Note: The percentages add up to 100%*
What scholarship strategy would you recommend to our BOT to address unmet financial need?

<table>
<thead>
<tr>
<th>Scholarships</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broaden Qualifications*</td>
<td>27%</td>
</tr>
<tr>
<td>Continuum/Portable Scholarships*</td>
<td>23%</td>
</tr>
<tr>
<td>Re-assign Scholarships*</td>
<td>18%</td>
</tr>
<tr>
<td>Middle Income Scholarships*</td>
<td>14%</td>
</tr>
<tr>
<td>Catholic Families</td>
<td>4%</td>
</tr>
<tr>
<td>Full Need Awards</td>
<td>4%</td>
</tr>
<tr>
<td>Reduce Tuition</td>
<td>5%</td>
</tr>
<tr>
<td>Transfer Grants</td>
<td>5%</td>
</tr>
</tbody>
</table>
Actions to Date

- Continued to solicit school feedback through school advisory committees and individual school meetings
- Updated income parameters to align with MA HUD affordable housing program
- Implemented 5% cost-of-living scholarship increase for returning elementary school scholarship recipients
- Identified two schools for inaugural Capacity Grants
- Increased K-12 funding at five targeted communities to build Catholic school continuum for low-income students
- Expanded Guaranteeing Opportunities (GO) strategy to increase access to HS for students from 13 CSF elementary schools
- Added three new ES to the City Connects guidance counselor program with new underwriting
- Integrated new, targeted non-scholarship funding into long-range forecasting tool and FY21 budget to provide impactful opportunities for schools
Updated Income Parameters

- $53K for a family of four
- Align with MA HUD parameters
- Based on school feedback to CSF
- Will continue to evaluate
5% Award Increase

- Based on school feedback to CSF
- To address cost of living and tuition increases on eligible scholarships
- CSF applied directly to any eligible application verified in FACTS before 6.30
- All grant criteria apply

1675 or 72% of returning elementary scholarship recipients applied and qualified for the 5% cost-of-living increase.

$3.5M of returning elementary scholarship recipient aid was applied before 6.30.
COVID-19 UPDATE
Overview

- FY20 Emergency Funds: $508K to 636 Students
- FY21 Summer Additional Aid: $464K to 167 Students
  - Emergency Funds: $295,280 for 167 Students
  - Guaranteed Awards: $139,300 for 50 Students
  - Grants for Closed Schools: $29,000 for 15 Students
- Redirection of Innovation Funds: $500,000
  - Two one-time scholarship grants to support Cristo Rey model schools
- Total: $1.47M
Peter Lynch Scholars

- Peter Lynch Scholar program was established to honor Peter Lynch’s involvement with the Catholic Schools Foundation
- Schools receiving CSF guaranteed scholarship aid designate 1-5 students K2-8
- Nominate an 8th grade student to build K-12 continuum with RCAB high schools.
- Peter Lynch Scholar Criteria
  - Designees noted in FACTS AND via online form by September 30
- COVID PIVOT: Peter Lynch Scholar Mass – TBD
Thank You Project

- Grant expectation of all schools receiving CSF funding in FY21
- Largest donor stewardship initiative
- Re-envisioned for 20-21 to accommodate remote, hybrid models
- More information will be sent from Samantha Abate
- **COVID PIVOT**: Focus on virtual thank you videos
The emergency Fund application is to be completed on behalf of a student whose family is experiencing an unexpected and urgent financial need.

- 5 application rounds lasting 6 weeks with notification to the school the 7th week
- Application opens October 1 – April 23 pending available funds
- [Emergency Fund Criteria and Timeline](#)
- [COVID PIVOT: Based on available funds](#)
IMPORTANT DATES
## Important Upcoming Dates

<table>
<thead>
<tr>
<th>DATE</th>
<th>TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 30</td>
<td>Deadline</td>
<td>New and Returning scholarship recipients’ awards reserved in FACTS.</td>
</tr>
<tr>
<td>September 30</td>
<td>Deadline</td>
<td>Peter Lynch Scholar designees in FACTS and <a href="#">online form</a> complete.</td>
</tr>
<tr>
<td>October 1</td>
<td>Application Opens</td>
<td>Emergency fund Round 1</td>
</tr>
<tr>
<td>October 16</td>
<td>Verification</td>
<td>Forms sent to schools</td>
</tr>
<tr>
<td>October 30</td>
<td>Deadline</td>
<td>Fall Verification Forms Due</td>
</tr>
<tr>
<td>November 4</td>
<td>Application Opens</td>
<td>FY22 Scholarship Grant Application</td>
</tr>
<tr>
<td>November 19</td>
<td>Distribution</td>
<td>First Fall Distribution</td>
</tr>
</tbody>
</table>
Verification

- CSF intentionally over-allocates scholarship budget anticipating withdrawals
- Anticipated an increased retention rate from 80% to 82% for FY21
- Currently have 90% retention rate based on current withdrawal data
- Data impacts your school’s payout, CSF FY21 budget and available funds
Verification

Actions Before October 1:
- Confirm student award amounts are correct in correct FACTS Fund
- Remove awards in FACTS Fund for student not enrolled
- Reserve or Finalize all awards in FACTS
- Complete CSF withdrawal forms for withdrawn students
  (csfboston.smapply.org)
Verification

Actions After October 16:

- Complete verification forms using instructions sent by CSF
- Sign and return by October 30 to allocations@csfboston.org
# FACTS Fund Definitions

<table>
<thead>
<tr>
<th>Fund</th>
<th>Definition</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General Fund</strong></td>
<td>For returning, qualifying students who received General, NOVA, Retention or Recruitment scholarships in the 2019-2020 school year. Scholarship amounts remain the same as the previous year. Only CSF can increase awards by 5% if applications are verified by June 30, 2020 and grant criteria are met. If a student received a General scholarship AND a NOVA or Retention scholarship in FY20, the General scholarship for FY21 is the sum of the awards. If a student withdraws from the school or does not re-qualify for aid, the school cannot re-assign the award in any fund.</td>
<td>June 30 ➔ September 30</td>
</tr>
<tr>
<td><strong>NOVA Fund</strong></td>
<td>For currently or newly enrolled students granted aid through the NOVA process.</td>
<td>September 30</td>
</tr>
<tr>
<td><strong>HRI/NIS New Fund</strong></td>
<td>For students who are new to the school recruited through additional FY21 HRI/NIS funds.</td>
<td>September 30</td>
</tr>
<tr>
<td><strong>HRI/NIS Returning Fund</strong></td>
<td>For qualifying students who received HRI/NIS scholarships in the 2019-2020 school year. Scholarship amounts remain the same as the previous year. Only CSF can increase awards by 5% if applications are verified by June 30, 2020 and grant criteria are met.</td>
<td>June 30 ➔ September 30</td>
</tr>
<tr>
<td><strong>Recruitment Fund</strong></td>
<td>For qualifying students who are new to the school.</td>
<td>September 30</td>
</tr>
<tr>
<td><strong>Retention Fund</strong></td>
<td>For returning students who did not receive a scholarship the previous year OR students in General or HRI/NIS funds who require additional scholarship support.</td>
<td>September 30</td>
</tr>
</tbody>
</table>
COMMUNICATIONS
Monthly Memo

- Emailed to the primary and secondary school contact the first of every month.
- Includes important updates, dates, deadlines and opportunities for school and scholarship recipients.
- Archived on our website: [www.csfboston.org](http://www.csfboston.org)
- Let Christine Lattin know if you are not receiving [clattin@csfboston.org](mailto:clattin@csfboston.org)
Website

- [www.csfboston.org](http://www.csfboston.org)
- Calendar – live updates
- Communications and Presentations
- Apply for a grant via SurveyMonkey Apply
- Forms and Reporting
- Updated Policies
- Press Toolkits
- Other Opportunities
Primary and Secondary Contacts

- **Main Contact**
  - Receives all CSF communications
  - Ensures information is distributed to proper school members
  - Meets all CSF deadlines
  - Returns all forms

- **Secondary Contact**
  - Receives all CSF communications

- Update contact information
  [www.csfboston.org/forms/](http://www.csfboston.org/forms/)
Social Media

Inner-City Scholarship Fund Boston

@icsfboston

@icsfboston

Please contact Samantha Abate with interesting stories, marketing and communication questions sabate@csfboston.org
GRANT PROCESS
CSF Grant Process

- Reviewed applications using grant criteria
- Read by multiple readers (CSF staff, board and committee members, key stakeholders)
- Asked follow-up questions
- Considered CSF knowledge of schools
- Discussed and approved by Allocations Committee
- Provided notification with school-specific feedback
# Grant Criteria

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Metrics</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Low-Income Families</strong></td>
<td><strong>Metrics</strong></td>
</tr>
<tr>
<td><em>Current scholarship families earn $13,000/capita or less</em></td>
<td>Increased enrollment of low-income students.</td>
</tr>
<tr>
<td><strong>Low-Income Communities</strong></td>
<td><strong>Metrics</strong></td>
</tr>
<tr>
<td><em>Significant number of students qualify for free/reduced lunch (more than 30%)</em></td>
<td>Increased access through scholarships focused at in-need communities.</td>
</tr>
<tr>
<td><strong>Positive Impact on School</strong></td>
<td><strong>Metrics</strong></td>
</tr>
<tr>
<td><em>Successes demonstrate school are impacted positively</em></td>
<td>Increased enrollment, strengthened operational vitality, and diverse, positive, thriving school cultures.</td>
</tr>
<tr>
<td><strong>Partnerships</strong></td>
<td><strong>Metrics</strong></td>
</tr>
<tr>
<td><em>Clearly stated, detailed strategy to work with local area Catholic high schools</em></td>
<td>Elementary schools proactively communicate with high schools, consult with school leaders and guidance counselors, share resources and collaborate on programs with Catholic high schools.</td>
</tr>
<tr>
<td><strong>Positive Impact on Students</strong></td>
<td><strong>Metrics</strong></td>
</tr>
<tr>
<td><em>Successes demonstrate students are impacted positively</em></td>
<td>Scholarship recipients show success through matriculation to high quality high schools, teachers’ reports/other academic achievements, and participation in school and community events (sports teams, clubs, service projects).</td>
</tr>
<tr>
<td><strong>Assist Low-Income Families</strong></td>
<td><strong>Metrics</strong></td>
</tr>
<tr>
<td><em>School supports families through the financial aid process</em></td>
<td>Schools support families through the financial process with specific strategies (e.g., hosts financial aid nights, provides individual assistance with financial aid applications, communicates effectively through multiple points of contact, provides a specific calendar to families).</td>
</tr>
<tr>
<td><strong>Outreach</strong></td>
<td><strong>Metrics</strong></td>
</tr>
<tr>
<td><em>School has a strategic outreach plan to fill empty seats and reach/maintain enrollment capacity.</em></td>
<td>Detailed, specific outreach plan with targeted grade levels, school demonstrates increased enrollment and classrooms at capacity over time.</td>
</tr>
<tr>
<td><strong>Increased Need</strong></td>
<td><strong>Metrics</strong></td>
</tr>
<tr>
<td><em>Meaningful increase in qualified financial aid applications from 16-17 to 19-20</em></td>
<td>There is a meaningful increase (more than 10) in qualified financial aid applications over three years.</td>
</tr>
</tbody>
</table>
February 27, 2020

Dear [Name],

On behalf of the Allocations Committee of the Board of Trustees of the Catholic Schools Foundation (CSF), I am pleased to share that Cheverus Catholic School has been awarded a FY21 scholarship grant of $[Amount].

Your school’s total FY21 budgeted scholarship support is detailed below:
- Guaranteed awards for all returning scholarship recipients*
- Guaranteed awards for new Retention and/or Recruitment
- Total

*Amount includes 2019-2020 General, Retention, Recruitment, NOVA, HRI, Horizons, Continuum returning scholarship recipients.
*Amount includes 5% increase for General, Retention, Recruitment, NOVA, HRI only provided eligibility is met.

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Application Feedback

In order to strengthen communication and partnerships with elementary schools, CSF and the Allocations Committee offer the following feedback on your FY21 grant application. This feedback is based on the alignment of the school’s efforts with CSF’s funding priorities. Please be in touch if you would like to review this information further.

**Commendations:**
- School serves low-income communities
- Demonstrates increased financial need through qualified financial aid applications (3 year change)
- CSF Scholarship program(s) positively impact(s) students

**Opportunities:**
- School assists families with the financial aid process with multiple strategies: School has an outreach plan with more than 2 specific strategies to fill empty seats and reach enrollment capacity or maintain enrollment capacity; School partners meaningfully with Catholic high schools; CSF Scholarship program(s) positively impact(s) the school

Sincerely,

[Signature]

CSF Catholic Schools Foundation

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Questions?

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