CATHOLIC SCHOOLS FOUNDATION


Winter Webinar
March 3, 2020
10:00 AM
Objectives

− To outline new CSF processes and policies based on the State of the Foundation meeting and school discussions
− To communicate effectively in order to facilitate successful partnerships
Agenda

- Review of CSF Grant Process
- Actions since State of the Foundation
- Process for 5% Award Increase
- Winter Online Verification
- Updated Income Parameters
CSF 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
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Metrics</th>
</tr>
</thead>
</table>
| **Low-Income Families**  
*Current scholarship families earn $13,000/capita or less* | Increased enrollment of low-income students. |
| **Low-Income Communities**  
*Significant number of students qualify for free/reduced lunch (more than 30%)* | Increased access through scholarships focused at in-need communities. |
| **Positive Impact on School**  
*Successes demonstrate school are impacted positively* | Increased enrollment, strengthened operational vitality, and diverse, positive, thriving school cultures. |
| **Partnerships**  
*Clearly stated, detailed strategy to work with local area Catholic high schools* | Elementary schools proactively communicate with high schools, consult with school leaders and guidance counselors, share resources and collaborate on programs with Catholic high schools. |
| **Positive Impact on Students**  
*Successes demonstrate students are impacted positively* | 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). |
| **Assist Low-Income Families**  
*School supports families through the financial aid process* | 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). |
| **Outreach**  
*School has a strategic outreach plan to fill empty seats and reach/maintain enrollment capacity.* | Detailed, specific outreach plan with targeted grade levels, school demonstrates increased enrollment and classrooms at capacity over time. |
| **Increased Need**  
*Meaningful increase in qualified financial aid applications from 16-17 to 19-20* | There is a meaningful increase (more than 10) in qualified financial aid applications over three years. |
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.

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.

School-Specific Feedback

Grant notification letters list commendations and opportunities based on grant criteria.

67 Battery March Street • 6th Floor • Boston, MA 02110 • 617.778.5981 tel • 617.778.5980 fax • csfboston.org
STATE OF THE FOUNDATION UPDATE
State of the Foundation
Recap

• Shared the state of the foundation with school partners

• 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>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competitive School Programs</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>Financial Aid</td>
<td>46%</td>
<td></td>
</tr>
<tr>
<td>Facilities/Space</td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>Teacher Salaries</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>Academic Support/Resources</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Technology</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Enrichment Programs</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Guidance Counselor</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Special Education</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Development</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Student Retention</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Business Manager</td>
<td>1%</td>
<td></td>
</tr>
<tr>
<td>Nurse</td>
<td>1%</td>
<td></td>
</tr>
<tr>
<td>Operating Expenses</td>
<td>1%</td>
<td></td>
</tr>
<tr>
<td>Transportation</td>
<td>1%</td>
<td></td>
</tr>
</tbody>
</table>

Financial aid is the largest unmet need, followed by competitive school programs.
What scholarship strategy would you recommend to our BOT to address unmet financial need?

### Scholarships

- Broaden Qualifications *
- Continuum/Portable Scholarships *
- Re-assign Scholarships *
- Middle Income Scholarships *
- Catholic Families
- Full Need Awards
- Reduce Tuition
- Transfer Grants

![Pie chart showing distribution of scholarship strategies]

- Broaden Qualifications: 27%
- Continuum/Portable Scholarships: 23%
- Re-assign Scholarships: 18%
- Middle Income Scholarships: 14%
- Catholic Families: 4%
- Full Need Awards: 4%
- Reduce Tuition: 5%
- Transfer Grants: 5%
Actions to Date

- Continued to solicit school feedback through school advisory committees and individual school meetings
- Implemented 5% cost-of-living scholarship increase for returning elementary school scholarship recipients
- Updated income parameters to align with MA HUD affordable housing program
- 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
5% AWARD INCREASE
5% Award Increase

- Based on school feedback to CSF
- To address cost of living and tuition increases
- Increase is reflected in grant notification, but only if eligibility is met
- All grant criteria apply
Eligible Returning Awards
5% Increase

- 19-20 General
- 19-20 Retention
- 19-20 Recruitment
- 19-20 NOVA
- 19-20 HRI
NOT ELIGIBLE Returning Awards
5% Increase

- 19-20 Continuum
- 19-20 Horizons

Rationale
- Different budget and assigning structures
Process

- Eligible returning awards
- Verified* FACTS FA application by 5.1.2020
  - CSF assigns the award + increase directly in FACTS
  - New award amount will always round up to the nearest 10’s ($2,054 → $2,060)
  - Only CSF can increase awards by 5% if applications are verified by May 1, 2020 and grant criteria are met.

*Does not file (DNF) also accepted
Process

- Eligible returning awards
- Verified* FACTS FA application between 5.2.2020 and 6.30.2020
  - School assigns the award but NO INCREASE in FACTS
  - Only CSF can increase awards by 5% if applications are verified by May 1, 2020 and grant criteria are met.

*Does not file (DNF) also accepted
Process

- All returning guaranteed awards
- NO Verified FACTS before 6.30.2020
  - Awards that are not reserved in FACTS Grant & Aid by the designated deadline are not available to the school or the student.
School Responsibilities

- ALL communication with families
  - 5% increase eligibility, reminders, deadlines
- Monitor FA application statuses
- Assign returning awards in FACTS 5.2 to 6.30
- Assign all NEW awards in FACTS
- Assign all Continuum and Horizons in FACTS
- CSF will NOT monitor application statuses or remind families
ONLINE VERIFICATION
Online Enrollment Verification

- From School Feedback
- New Process Recommendations
  - Read instructions fully
  - Call FACTS first
Winter 2020 Verification Instructions

1. Log onto online.factsmgt.com and select the 2019-2020 school year.
2. Click “View Applications” on the Grant & Aid Dashboard

The verification report is in the “Applications” section on FACTS.

Make sure you selected the 2019-2020 school year.

Look under “Shared Reports.”
4. Click “Open Column” on the left side of the window
- Click ALL FOUR: “Enrolled,” “Primary Reason for Withdrawal,” “Secondary Reason for Withdrawal, and Transfer School Type”
5. For **ENROLLED** CSF Scholarship Recipients:

- Select the box in the “Enrolled” column in the report.

- Scholarship recipients should have total funding listed in the 4th column - “Total Reserved & Finalized Awards (My Institution).”

- Use your school’s fall verification form to confirm which students are CSF recipients

---

**Winter 2020 Verification**

![Image of Winter 2020 Verification form]

*CSF Scholarship recipients have funding listed in the fourth column*
6. **FOR WITHDRAWN** CSF Scholarship Recipients:
- Leave the box in the “Enrolled” column unselected/blank.
- Complete the primary and secondary reason for withdrawal.
- Complete the transfer school type

**IMPORTANT NOTE:** You do NOT need to complete an online withdrawal form for withdrawn scholarship recipients if the information provided in this report is complete. If the information is incomplete or unclear, an online withdrawal form will be requested CSF.
7. Click “Save” to complete your report.
8. Export the report for your records.
9. DUE DATE: March 12, 2020
   - You may update your report anytime through March 12, 2020.

No action required for Non-CSF Scholarship Recipients.
Why do the Online Verification

- Easier!
- Comply with CSF processes
- Receive April Payout on time
UPDATED INCOME PARAMETERS
Updated Income Parameters

- $53K for a family of four
- Align with MA HUD parameters
- Based on school feedback to CSF
- Will continue to evaluate
On behalf of the Catholic Schools Foundation’s Board of Trustees, you are cordially invited to the Pastor/Principal Reception.

In recognition of your work Building Minds and Changing Lives in Catholic schools.

Thursday, March 5, 2020
4:00-6:00 PM
St. Julia Parish Hall
374 Boston Post Rd, Weston, MA 02493

RSVP by February 21st
Click Here to Register!