

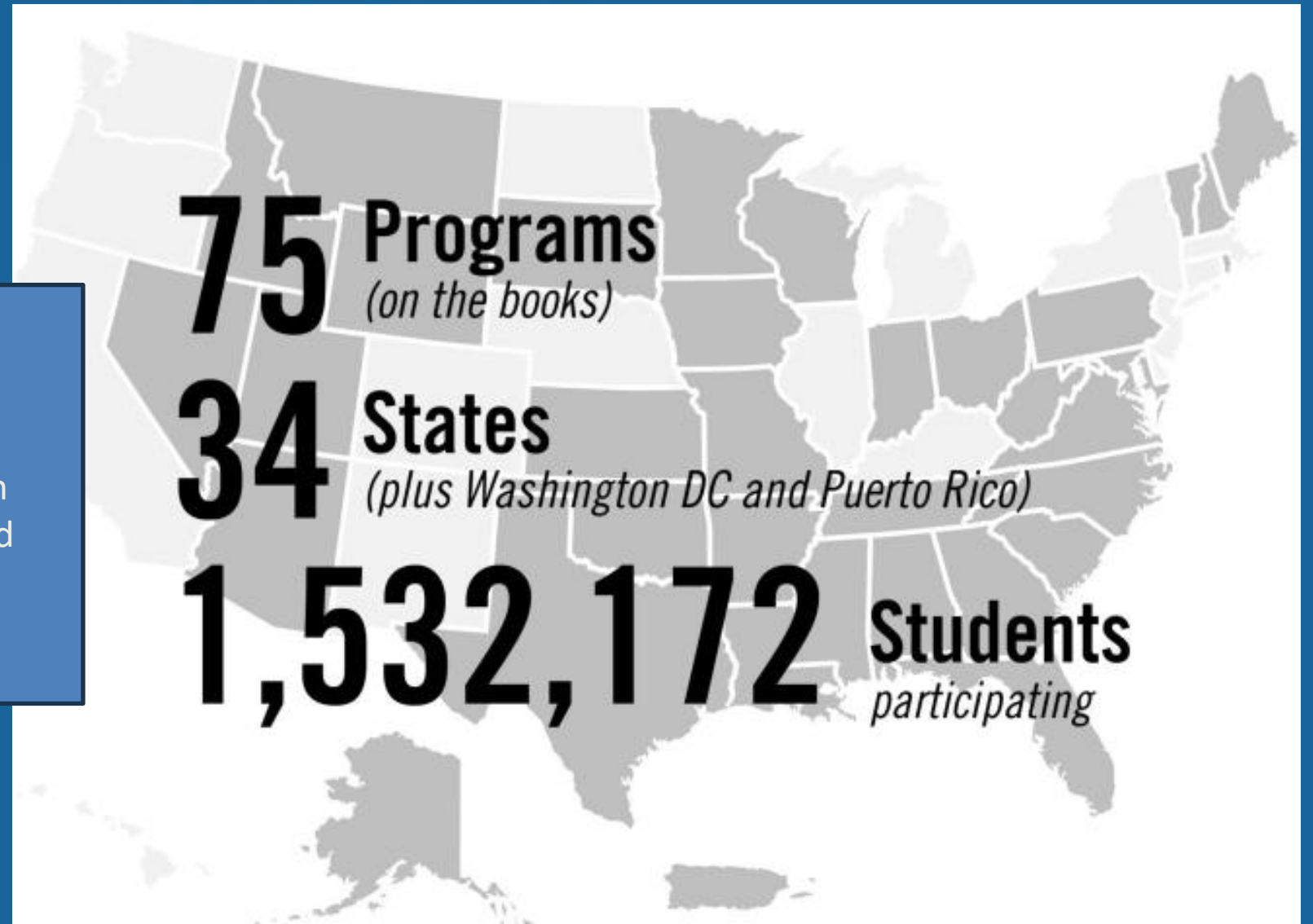


School Choice and the Impact on Catholic Schools

A Diocesan Model for Readiness, Growth and Sustainability

School Choice Landscape

Across the country, the education landscape is shifting rapidly. In just the past three years, more than twenty states have launched or expanded school choice programs.



Legislative Momentum

160+ school choice bills introduced across ~28 states

Program Expansion

- New Hampshire:** legislation removes enrollment caps, enabling universal participation beginning July 2026.
- Tennessee:** proposal increase ESA participation cap from 25,000 to 40,000 students.
- South Dakota:** enacted legislation raises scholarship value to approximately \$5,000 per student.



New Program Creation

- Mississippi:** proposed Magnolia Student Accounts program would launch with universal eligibility beginning in the 2027-28 school year.
- Maryland & New Jersey:** new ESA and tax credit proposals targeting low-income families are advancing in multiple chambers.

Policy Recalibration

- Ohio and West Virginia** are considering legislation that would introduce income thresholds or other participation limits within universal programs.

Strengthened Oversight

- Utah:** legislation introduces stricter accreditation standards, mandatory audits, and financial sovereignty verification.
- Florida:** new legislation strengthens fraud oversight, student tracking, and compliance reporting.

Federal Program Alignment

- Twenty-seven states have already opted into the Federal Scholarship Tax Credit program, while additional states—including Idaho, Georgia, Maryland, and West Virginia—are introducing legislation to structure implementation, define SGO certification frameworks, and ensure participation ahead of the program's 2027 launch.





Overview of the Education Freedom Tax Credit (EFTC)



The Education Freedom Tax Credit (EFTC)

Signed on **July 4, 2025** as part of the One Big Beautiful Bill Act.



Federal income tax credit for **individuals** who donate to Scholarship Granting Organizations (**SGOs**).

SGOs award scholarships for **K-12 expenses**.



States must opt in and submit an annual list of approved SGOs to participate

Donors can contribute and scholarships can be generated starting **January 1, 2027**.

Federal Scholarship Tax Credit Flowchart

State Must Opt In

- Governor elects participation
- State submits approved SGOs to IRS
- Only SGOs in opt-in states may participate

Scholarship Granting Organizations

- Maintain one or more separate accounts exclusively for FSTC qualified contributions
- Must spend at least 90% of income on scholarships
- Must verify household income and student eligibility annually

Revenue & Participation Potential

- ~100 million taxpayers have positive federal income tax liability
- ~40–50 million tax filers have at least \$1,700 in federal tax liability

If annual participation reaches:

- 1% ~\$800 million
- 15% ~\$12 billion
- 30% ~\$24 billion



Congress Creates a Federal Tax Credit

- 100% federal income tax credit
- Up to \$1,700 per taxpayer
 - For donations to approved 501 (c)(3) SGOs

Donor

- Make a cash contribution to an approved SGO
- May contribute regardless of whether their state opts in
- May designate a school

Scholarships Used for Qualified K-12 Expenses

Includes:

- Tuition & fees
- Tutoring & special education
- Books, technology, transportation
- After-school & summer programs



School Choice: Opportunities & Impacts on Catholic Schools

1 Enrollment & Access

Opportunities

- Expanded access for middle- & lower-income families
- Enrollment stabilization or growth in many states
- Reach new demographics who couldn't afford tuition

Risks

- Sudden demand → capacity constraints (staffing, space)
- More transient enrollment depending on program rules
- Increased competition across all school sectors

2 Financial Model

Opportunities

- Diversifies revenue beyond parish subsidies
- More predictable tuition payments when programs are stable
- Potential to reduce unmet financial aid need

Risks

- Cash flow timing: state/SGO disbursements vs. payroll
- Overreliance on legislatively changeable program funding
- Need for more sophisticated financial tracking & reporting

3 Operational Complexity

Opportunities

- Drives modernization of systems and processes
- Creates alignment across admissions, business office & leadership

Risks

- Managing multiple programs
- Admin burden: invoicing, expense tracking, audit documentation
- Staff training becomes critical across all departments

4 Compliance & Accountability

Opportunities

- Opportunity to demonstrate value and outcomes
- Strengthens data practices: attendance, academics, finances

Risks

- Compliance requirements vary by state and program
- Potential audits or funding clawbacks if mismanaged
- Clear policies needed: tuition structuring, eligible expenses

5 Mission & Identity

Opportunities

- Deepens mission: serving more families in need
- Reinforces Catholic education as accessible, not exclusive

Risks

- Concerns: government influence or regulation
- Pressure on admissions flexibility & religious identity
- Some schools may choose not to participate

6 Marketing & Enrollment

Opportunities

- Shift from 'affordability barrier' to value proposition
- Ability to actively grow enrollment pipelines
- Targeted outreach using geography and income data

Risks

- Messaging complexity: explaining programs & setting expectations
- Increased competition: charter, micro-schools, homeschool networks

7 Diocesan Impact

Opportunities

- Operate as a coordinated system, not isolated schools
- Shared services (finance, admissions, compliance) more valuable
- Data-driven decision making

Risks

- Inconsistent readiness across schools in the diocese
- Need for centralized strategy and infrastructure
- Diocesan offices can lead: policy, training, vendor decisions

8 Long-Term Sustainability

Opportunities

- School choice can be a lifeline for long-term viability
- Potential to expand in underserved areas

Risks

- Legislative uncertainty: state opt-in, caps, federal rules
- Programs evolving faster than operations can adapt
- Schools that don't adapt risk falling behind competitors

School Choice

Road Map for Catholic Schools

A comprehensive approach to the opportunities of School Choice in Catholic Schools by building systems of support that can be sustained and improved upon.



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— ARCHDIOCESE OF SAN ANTONIO —

TEFA

TEXAS EDUCATION FREEDOM ACCOUNTS (TEFA)

In 2025, Texas Legislature passed Senate Bill 2 and provided \$1 billion in funding to create the Texas Education Freedom Accounts (TEFA) program and give parents greater freedom and flexibility in choosing the best educational environment for their children.

- The program begins with the 2026-27 academic year.
- Eligible students are slated to be awarded \$10,474 and upward of \$30K for those with qualifying learning disabilities.
- TEFA funds are released to families via an E-wallet for state designated approved educational related expenses.
- Once awarded into the TEFA program, participation is perpetual through the student's course of education and un-used funds can roll from year to year.



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BEFORE WE DIVE INTO THE TEXAS EDUCATION FREEDOM ACCOUNTS (TEFA)



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Operation Success Forum known as OSF...

- Its' purpose
 - Identify needs (*unpack and pack our suitcase!*)
 - Create an Operational Life Cycle
 - Partner with lines of businesses
 - Identify opportunities for improvement
 - Share best practices
 - Identify shared resource opportunities
 - Meet quarterly
 - Move from viability to *vitality!*



OPERATIONAL SUCCESS FORUM

Y1

- **Need to Understand & Identify Financial Health**
 - *KPI's and Data Analytics*
 - *Operational Viability vs. Vitality*
- **Need to Rebuild Trust**
 - *Open the lines of communication*
- **Focus on Basics**
 - *Operational Lifecycle by Quarter*
 - *Data Entry*
 - *Analyzing Reports*
- **Commitment to be present in our Diocesan Schools**
 - *Provide support and guidance*
 - *Build a system that others would follow*



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OPERATIONAL SUCCESS FORUM

Y1

OPERATION SUCCESS FORUM (OSF)



OPERATIONAL LIFE CYCLE BY QUARTER

OPERATIONAL SUCCESS FORUM

Y2

Systems & Processes

- **Start with Governance**
 - *Council Binders & Report Templates*
 - *Governance Leadership Training*
 - *Mission and Purpose*
- **Defining Viability vs. Vitality**
 - *Focus on Budgets & Timelines*
 - *Cost to Educate Templates*
 - *Personnel Templates*
 - *Building Salary Scales*
 - *Enrollment Projections*
 - *Retention Analytics*
 - *Marketing Efforts*
- **Facility Monitoring**
 - *FMX (scheduling, maintenance, transportation, rentals, etc.)*



CATHOLIC SCHOOLS
ARCHDIOCESE OF SAN ANTONIO

Funding Sources

Tuition



Parents
Guardians

Ancillary
Income



Rentals
Sporting Events
Spirit Apparel

Fundraising



Events
Galas
Annual Appeals

Donors



Alumni
School Supporters
Parish Subsidy



Budget Timeline

November & December

*Begin to collect historical data
Begin to forecast out enrollment
Begin meeting with Lines of Businesses
Review Fee Structures
Build/Review Salary Scales*

January & February

*Begin to look at staffing models
Begin to look at maintenance projects
Calculate Cost to Educate
Propose & approve new tuition rate & fees*

March & April

*Continue work on the budget
Continue work on staffing models & non-renewals*

May & June

Finalize returning staff & advertise for new hires

August & September

*Revise budget based on actual enrollment
Approve final budget*



November & December



Collect Historical Data

Look at 2 full years plus current year.
Look for trends (up or down).
Month-end December equals 50% of the budget thus far.

Forecast Out Enrollment

Take existing enrollment & advance a grade.
Identify (color code) grades to watch.
Work with marketing team/develop marketing efforts for target areas.
Be sure to take into consideration retention rates by grade.
Review Fee Structure & Refine Enrollment Process

Meet with Lines of Businesses

Planning for next year in the areas of...

- Athletics
- Academics
- Campus Ministry
- Enrollment/Marketing
- Facilities
- Etc.

Build &/or Review Salary Scales

- Adjust Salary Scales
- Factor in Raises/COLA
- Edit Salary Templates
- Factor in % increase to Health Benefits



STAFFING NEEDS BASED ON ENROLLMENT FORECASTING & EXISTING COST TO EDUCATE

➤ Advance Students

➤ # of graduating students must equal new enrollment to stay even (graduated 26)

➤ How confident are retention %'s?

➤ Is classroom income enough to cover the classroom cost to educate?

➤ Notice CTE is not the same



➤ Is staffing in line with enrollment forecasting?

Grade & Staffing	PK3 (1.5FTE)	PK4 (2 FTE)	5K - A (1.5 FTE)	5K - B (1.5 FTE)	1st - A (1 FTE)	1st - B (1 FTE)	2nd - A (1 FTE)	2nd - B (1 FTE)	3rd - (1 FTE)	4th - (1 FTE)	5th - (1 FTE)	6th - (1 FTE)	7th - (1 FTE)	8th - (1 FTE)
Salary & Benefits	\$52,198.75	\$71,339.25	\$60,278.81	\$57,728.81	\$41,583.75	\$46,934.63	\$33,303.75	\$43,949.40	\$45,823.50	\$42,991.88	\$36,232.65	\$47,103.60	\$36,007.35	\$52,879.50
Actual 2022-23	17	23	14	16	15	16	18	18	26	24	25	22	18	26
Revenue (Tuition x # of students)	\$93,500.00	\$126,500.00	\$71,400.00	\$81,600.00	\$76,500.00	\$81,600.00	\$91,800.00	\$91,800.00	\$132,600.00	\$122,400.00	\$127,500.00	\$112,200.00	\$91,800.00	\$132,600.00
Cost to Educate per Class based on enrollment	\$112,313.38	\$151,953.40	\$92,493.38	\$105,706.72	\$99,100.05	\$105,706.72	\$118,920.05	\$118,920.05	\$171,773.41	\$158,560.07	\$165,166.74	\$145,346.73	\$118,920.05	\$171,773.41
Operating Net Activity	-\$18,813.38	-\$25,453.40	-\$21,093.38	-\$24,106.72	-\$22,600.05	-\$24,106.72	-\$27,120.05	-\$27,120.05	-\$39,173.41	-\$36,160.07	-\$37,666.74	-\$33,146.73	-\$27,120.05	-\$39,173.41
# of Students needed to cover Salary & Benefits	9	13	12	11	8	9	7	9	9	8	7	9	7	10
# of total Students needed to cover the operating loss per class	20	28	18	21	19	21	23	23	34	31	32	28	23	34
Grade & Staffing	PK3 (1.5FTE)	PK4 (2 FTE)	5K - A (1.5 FTE)	5K - B (1.5 FTE)	1st - A (1.5 FTE)	1st - B (1 FTE)	2nd - A (1FTE)	2nd - B (1 FTE)	3rd - (1 FTE)	4th - (1 FTE)	5th - (1 FTE)	6th - (1 FTE)	7th - (1 FTE)	8th - (1 FTE)
Projected 2023-24	0	17	23	0	14	16	15	16	36	26	24	25	22	18
Revenue (Tuition x # of students)	\$0.00	\$93,500.00	\$117,300.00	\$0.00	\$71,400.00	\$81,600.00	\$76,500.00	\$81,600.00	\$183,600.00	\$132,600.00	\$122,400.00	\$127,500.00	\$112,200.00	\$91,800.00
Cost to Educate per Class based on enrollment*	\$0.00	\$127,640.74	\$172,690.41	\$0.00	\$105,115.90	\$120,132.46	\$112,624.18	\$120,132.46	\$270,298.04	\$195,215.25	\$180,198.69	\$187,706.97	\$165,182.14	\$135,149.02
Operating Net Activity	\$0.00	-\$34,140.74	-\$55,390.41	\$0.00	-\$33,715.90	-\$38,532.46	-\$36,124.18	-\$38,532.46	-\$86,698.04	-\$62,615.25	-\$57,798.69	-\$60,206.97	-\$52,982.14	-\$43,349.02
# of total Students needed to cover the operating loss per class	0	23	34	0	21	24	22	24	53	38	35	37	32	26



What do you see? What decisions need to be made?



Proposed			
Grade	Annual Tuition Rate	Student Count	Tuition Income
3K	\$5,800	20	\$116,000
4k	\$5,800	17	\$98,600
K	\$5,400	23	\$124,200
1	\$5,400	30	\$162,000
2	\$5,400	31	\$167,400
3	\$5,400	36	\$194,400
4	\$5,400	26	\$140,400
5	\$5,400	24	\$129,600
6	\$5,400	25	\$135,000
7	\$5,400	22	\$118,800
8	\$5,400	18	\$97,200
Total Enrollment & Tuition Income:		272	\$1,483,600
<i>Deduct Estimated Discounts & Unfunded Scholarships 10%:</i>			-\$148,360
Adjusted Tuition Income			\$1,335,240
Registration & Fees	\$200		\$54,400
Athletic Income			\$53,000
Cafeteria Income			\$0
Afterschool Care Income			\$32,200
Fundraising Income			\$150,000
Parish Subsidy/Other Income			\$72,000
Adjusted Total Income			\$1,696,840

Salaries & Benefit Expense	\$1,240,254
Curriculum & Instructional Expense	\$19,530
Operational (Facilities, Utilities, Insurance) Expense	\$369,680
Athletic Expense	\$65,235
Cafeteria Expense	\$0
Afterschool Care Expense	\$2,695
Fundraising Expense	\$30,000
Other Expenses	\$7,700
Debt (Loan Payments)	\$36,000
Total Budgeted Expenses:	\$1,771,094
Net Operating Profit/Loss	-\$74,254
Adjusted Tuition per Student	\$4,909
<i>Cost to Educate per student:</i>	(\$6,511)
Gap in Tuition Per Student	(\$1,602)
Gap in Tuition Per Student	(\$1,602)
Total Enrollment	272
Total Gap in Tuition Alone	(\$435,854)
# of students needed to balance the budget	14
Enrollment would need to be:	286

PROPOSED SAMPLE PRO FORMA



ENROLLMENT FORECASTING WITH ESTIMATED INCOME

ACADEMIC YEAR 2 FORECASTING

2023-2024 SCHOOL YEAR				2024-2025 SCHOOL YEAR				Tuition Rate	Tuition Income	2025-2026 SCHOOL YEAR				Tuition Rate	Tuition Income
Grade Level	Current Student Count	Withdrawals (not returning for 2024-25)	Adjusted Student Count	Grade Level	Returning Students (prefills from 23-24 Adjusted Student Count)	New Students (Finalized with Paperwork & Payment)	Total Student Count to Date	Income Based on Total Student Count To Date		Grade Level	Returning Students (prefills from 24-25 Adjusted Student Count)	New Students (Finalized with Paperwork & Payment)	Total Student Count to Date	Income Based on Total Student Count To Date	
PK3			0	PK3			0		\$0.00	PK3			0		\$0.00
PK4			0	PK4	0		0		\$0.00	PK4	0		0		\$0.00
PK5			0	PK5	0		0		\$0.00	PK5	0		0		\$0.00
1st			0	1st	0		0		\$0.00	1st	0		0		\$0.00
2nd			0	2nd	0		0		\$0.00	2nd	0		0		\$0.00
3rd			0	3rd	0		0		\$0.00	3rd	0		0		\$0.00
4th			0	4th	0		0		\$0.00	4th	0		0		\$0.00
5th			0	5th	0		0		\$0.00	5th	0		0		\$0.00
6th			0	6th	0		0		\$0.00	6th	0		0		\$0.00
7th			0	7th	0		0		\$0.00	7th	0		0		\$0.00
8th			0	8th	0		0		\$0.00	8th	0		0		\$0.00
9th			0	9th			0		\$0.00	9th			0		\$0.00
10th			0	10th	0		0		\$0.00	10th	0		0		\$0.00
11th			0	11th	0		0		\$0.00	11th	0		0		\$0.00
12th				12th	0		0		\$0.00	12th	0		0		\$0.00
TOTAL:	0	0	0	TOTAL:	0	0	0	TOTAL:	\$0.00	TOTAL:	0	0	0	TOTAL:	\$0.00

SAMPLE



Administrative Team

A focus on Leadership...



Examine traits of leaders you admire.

Chose a few leaders you have worked with directly or indirectly and reflect on what traits you admire and why.



12 to take?



12 to leave behind?



What list
would I be on?





CATHOLIC SCHOOLS
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“Things begin to happen”...when we hire for mission.

***2023 School Growth LLC
Scott Barron***

Human Resources Timeline

January & February

*Begin to look at staffing
models*

*Review or create salary
pay scales*

March & April

Identify non-returners

*Prepare Compensation
Sheets & Ministry
Agreements*

May & June

*Finalize staffing needs &
identify new hires*

Post open positions

August & September

*Ensure increases are in
effect (if applicable)*

Onboard new hires

Texas Education Agency Minimum Salary Guidelines

Completed Years	TEA 2025-26 Minimum		OPTION 1 20% Below TEA Average Baseline		OPTION 2 15% Below TEA Average Baseline		OPTION 3 10% Below TEA Average Baseline		OPTION 4 5% Below TEA Average Baseline
Year 0	\$33,960	80%	\$27,168	85%	\$28,866	90%	\$30,564	95%	\$32,262
Year 1	\$34,690	80%	\$27,752	85%	\$29,487	90%	\$31,221	95%	\$32,956
Year 2	\$35,410	80%	\$28,328	85%	\$30,099	90%	\$31,869	95%	\$33,640
Year 3	\$36,150	80%	\$28,920	85%	\$30,728	90%	\$32,535	95%	\$34,343
Year 4	\$37,690	80%	\$30,152	85%	\$32,037	90%	\$33,921	95%	\$35,806
Year 5	\$39,230	80%	\$31,384	85%	\$33,346	90%	\$35,307	95%	\$37,269
Year 6	\$40,770	80%	\$32,616	85%	\$34,655	90%	\$36,693	95%	\$38,732
Year 7	\$42,200	80%	\$33,760	85%	\$35,870	90%	\$37,980	95%	\$40,090
Year 8	\$43,550	80%	\$34,840	85%	\$37,018	90%	\$39,195	95%	\$41,373
Year 9	\$44,840	80%	\$35,872	85%	\$38,114	90%	\$40,356	95%	\$42,598
Year 10	\$46,040	80%	\$36,832	85%	\$39,134	90%	\$41,436	95%	\$43,738
Year 11	\$47,180	80%	\$37,744	85%	\$40,103	90%	\$42,462	95%	\$44,821
Year 12	\$48,280	80%	\$38,624	85%	\$41,038	90%	\$43,452	95%	\$45,866
Year 13	\$49,280	80%	\$39,424	85%	\$41,888	90%	\$44,352	95%	\$46,816
Year 14	\$50,250	80%	\$40,200	85%	\$42,713	90%	\$45,225	95%	\$47,738
Year 15	\$51,160	80%	\$40,928	85%	\$43,486	90%	\$46,044	95%	\$48,602
Year 16	\$52,030	80%	\$41,624	85%	\$44,226	90%	\$46,827	95%	\$49,429
Year 17	\$52,840	80%	\$42,272	85%	\$44,914	90%	\$47,556	95%	\$50,198
Year 18	\$53,610	80%	\$42,888	85%	\$45,569	90%	\$48,249	95%	\$50,930
Year 19	\$54,340	80%	\$43,472	85%	\$46,189	90%	\$48,906	95%	\$51,623
Year 20	\$55,030	80%	\$44,024	85%	\$46,776	90%	\$49,527	95%	\$52,279

INFORMATION ONLY

NOT FOR PUBLIC RELEASE

TEACHER PAY SCALE

Completed Years	Public School Average	TEA 2025-26	Proposed 2026-27			Proposed 2027-28			Proposed 2028-29		
			Grouped Year 1			Grouped Year 2			Grouped Year 3		
			Minimum	Midpoint	Maximum	Minimum	Midpoint	Maximum	Minimum	Midpoint	Maximum
Year 0	\$53,504	\$33,960	\$30,000	\$30,500	\$31,000	\$31,000	\$31,500	\$32,000	\$32,000	\$32,250	\$32,500
Year 1	\$53,879	\$34,690				\$32,500	\$33,000	\$33,500	\$33,500	\$33,750	\$34,000
Year 2	\$54,254	\$35,410				\$34,250	\$34,500	\$34,750			
Year 3	\$54,629	\$36,150	\$31,500	\$32,000	\$32,500	\$34,000	\$34,500	\$35,000	\$35,000	\$35,250	\$35,500
Year 4	\$55,004	\$37,690				\$35,750	\$36,000	\$36,250			
Year 5	\$55,379	\$39,230				\$36,500	\$36,750	\$37,000			
Year 6	\$56,154	\$40,770	\$33,000	\$33,500	\$34,000	\$37,000	\$37,500	\$38,000	\$38,000	\$38,250	\$38,500
Year 7	\$57,004	\$42,200				\$38,750	\$39,000	\$39,250			
Year 8	\$57,604	\$43,550				\$39,500	\$39,750	\$40,000			
Year 9	\$58,454	\$44,840	\$34,500	\$35,000	\$35,500	\$40,000	\$40,500	\$41,000	\$41,000	\$41,250	\$41,500
Year 10	\$59,304	\$46,040				\$41,750	\$42,000	\$42,250			
Year 11	\$60,154	\$47,180				\$42,500	\$42,750	\$43,000			
Year 12	\$61,004	\$48,280	\$36,000	\$36,500	\$37,000	\$43,000	\$43,500	\$44,000	\$43,250	\$43,500	\$43,750
Year 13	\$61,854	\$49,280				\$44,750	\$45,000	\$45,250			
Year 14	\$62,704	\$50,250				\$45,500	\$45,750	\$46,000			
Year 15	\$63,554	\$51,160	\$37,500	\$38,000	\$38,500	\$46,000	\$46,500	\$47,000	\$46,250	\$46,500	\$46,750
Year 16	\$64,404	\$52,030				\$47,750	\$48,000	\$48,250			
Year 17	\$65,754	\$52,840				\$48,500	\$48,750	\$49,000			
Year 18	\$66,604	\$53,610	\$39,000	\$39,500	\$40,000	\$49,000	\$49,500	\$50,000	\$49,250	\$49,500	\$49,750
Year 19	\$67,454	\$54,640				\$50,750	\$51,000	\$51,250			
Year 20	\$68,304	\$55,030				\$51,500	\$51,750	\$52,000			

SAMPLE

Administration and Staff Compensation Salary Scale by Level

1st - EDIT ROLES, LEVELS & ENTER ACTUAL SALARIES IN THE BOXES

2nd - EDIT PERCENTAGES

Level	Role	Below	Minimum	Mid Point	Maximum	
E1	Principal		\$60,000.00			
			70%	75%	80%	
E2	Vice Principal	<input type="text"/>	\$42,000.00	<input type="text"/> \$45,000.00	<input type="text"/> \$50,000.00	\$48,000.00
			70%	75%	80%	
E3	Deans	<input type="text"/>	\$29,400.00	<input type="text"/> \$33,750.00	<input type="text"/>	\$38,400.00
			80%	85%	90%	
E4	Director of Admissions & Enrollment	<input type="text"/>	\$23,520.00	<input type="text"/> \$31,000.00	<input type="text"/> \$28,687.50	\$34,560.00
E4	Director of Athletics	<input type="text"/>	\$23,520.00	<input type="text"/>	<input type="text"/> \$28,687.50	\$34,560.00
E4	Director of Business Operations/Business Manager	<input type="text"/>	\$23,520.00	<input type="text"/>	<input type="text"/> \$28,687.50	\$34,560.00
E4	Director of Campus Ministry	<input type="text"/>	\$23,520.00	<input type="text"/>	<input type="text"/> \$28,687.50	\$34,560.00
E4	Director of Communications & Marketing	<input type="text"/>	\$23,520.00	<input type="text"/>	<input type="text"/> \$28,687.50	\$34,560.00
E4	Director of Facilities	<input type="text"/>	\$23,520.00	<input type="text"/>	<input type="text"/> \$28,687.50	\$34,560.00
E4	Director of Strategic Development & Alumni Relations	<input type="text"/>	\$23,520.00	<input type="text"/>	<input type="text"/> \$28,687.50	\$34,560.00
E4	Academic/Guidance Counselor	<input type="text"/>	\$23,520.00	<input type="text"/>	<input type="text"/> \$28,687.50	\$34,560.00
E4	Librarian	<input type="text"/>	\$23,520.00	<input type="text"/>	<input type="text"/> \$28,687.50	\$34,560.00
			80%	85%	90%	
E5	Bookkeeper	<input type="text"/>	\$18,816.00	<input type="text"/>	<input type="text"/> \$24,384.38	\$31,104.00
E5	Nurse	<input type="text"/>	\$18,816.00	<input type="text"/>	<input type="text"/> \$24,384.38	\$31,104.00
			80%	85%	90%	
E6	Administrative Assistant/Secretary	<input type="text"/>	\$15,052.80	<input type="text"/>	<input type="text"/> \$20,726.72	\$27,993.60
E6	Facility Crew (Custodian)	<input type="text"/>	\$15,052.80	<input type="text"/>	<input type="text"/> \$20,726.72	\$27,993.60
E6	Librarian Assistant	<input type="text"/>	\$15,052.80	<input type="text"/>	<input type="text"/> \$20,726.72	\$27,993.60

INFORMATION ONLY

NOT FOR PUBLIC RELEASE

STAFF COMPENSATION SUMMARY SHEET FOR 2022-23

NAME: Susie Teacher

CONTRACT DATES: 8/1/2022 to 7/31/2023

Your total compensation summary for the 2022-23 academic school year is listed below. We ask that you review all information carefully and thoroughly.

***Please note that stipends for an additional duty may or may not be included at this time.*

BASE SALARY FOR 2022-23		\$43,154.00
STIPEND FOR ADDITIONAL DUTY**	Cheer Sponsor	\$1,500.00
STIPEND FOR ADDITIONAL DUTY**		
STIPEND FOR ADDITIONAL DUTY**		
STIPEND FOR COACHING		
TEXAS CERTIFICATION STATUS	Verified - Expires 9/30/2026	\$500.00
MASTER'S DEGREE		\$1,000.00
DOCTORATE DEGREE		
LONGEVITY PAY	13 years	\$2,000.00
TOTAL COMPENSATION (Ministry Agreement Total)		\$48,154.00
Health Benefits & Life Insurance (School portion based on 2021-22 election)		\$8,342.40
Pension Benefits (School Contribution)		\$2,407.70
Social Security & Medicare Benefits (School Contribution)		\$3,683.78
Worker's Compensation		\$240.77
Tuition Discount	50%	\$3,000.00
TOTAL COMPENSATION SUMMARY		\$65,828.65

SAMPLE



I have reviewed the information above and all information listed is correct.

Signature: _____ Date: _____

Please return the signed summary sheet to Business Office personnel. Thank you.

OPERATIONAL SUCCESS FORUM

Y3

Domains, Standards & Benchmarks

- **Divided the Standards into 4 OSF sessions to match the operational lifecycle**
 - *Group Exercises/Self assessments*
- **Continued Focus on Viability vs. Vitality**
 - *Deep dive into staffing (Right people on bus!)*
 - *Created Monthly Checklists*
 - *Identify & Redefine Value*
 - *Evaluate Offerings*
 - *Challenged the Budget*
 - *Build Equity*



CATHOLIC SCHOOLS
ARCHDIOCESE OF SAN ANTONIO

FACILITIES

Create a facilities committee

Use a checklist to help with planning

List your HVAC units (*largest expense other than a roof*) by age, brand, size – *this will help with planning*

Determine needs by category – *immediate, one year, within 3 years, within 5 years*

Budget high (*still trying to balance your budget*)

Challenge and track a line item that you can control (*Electricity usage, office supplies, etc.*)

Bank any net equity from those line items in a building fund annually

QUESTION...Does your school have reserves for a building fund? How can you create one?



FACILITIES Checklist

FACILITY ASSESSMENT CHECKLIST

Planning & Project Management/Plant Operations & Maintenance

5	NEW	New or like new condition; no issues to report; no expected failures; plan 8 to 10 years
4	GOOD	Good condition; no reported issues or concerns; replace in 6 to 8 years
3	FAIR	Average wear for building age; not new but no issues to report; replace within 4 to 6 years
2	POOR	Worn from use; end of expected use; replace within 2 - 4 years
1	CRITICAL	Extremely worn or damaged; replacement within 2 years

Evaluation Considerations

Age of Component

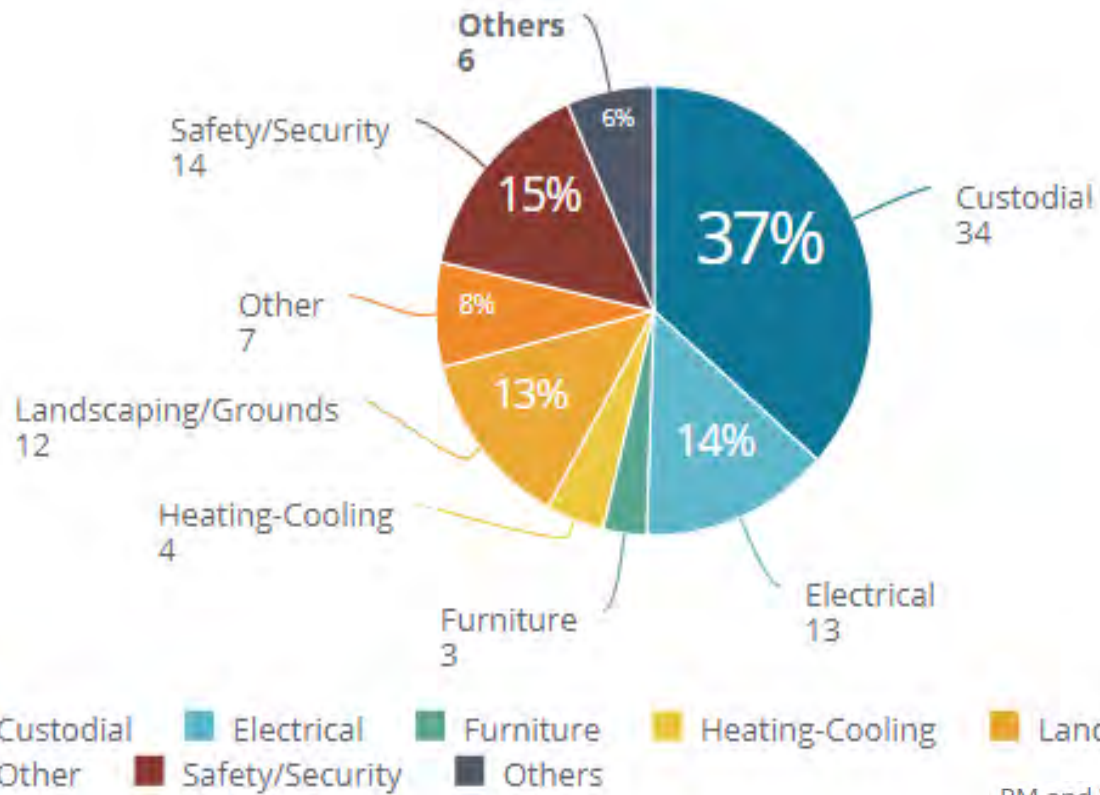
Expected Service Life

Maintenance Records

Visual Inspection Condition

GROUNDS/SITE		5	4	3	2	1
G1	Emergency Vehicle Access					
G2	Access Gates					
G3	Perimeter Fencing					
G4	Athletic Field/Court Fencing					
G5	Equipment Fencing					
G6	Lighting					
G7	On-Site Sidewalks					
G8	Paving - Parking Lot (Gym)					
G9	Paving - Parking Lot (Front)					
G10	Paving - Parking Lot (Side)					
G11	Paving - Parking Lot (FB/Tennis)					
G12	Striping/Pavement Markings/Speed Bumps					
G13	Curbing					
G14	On-Site Signage					
G15	Pedestrian Access (ADA & Safety)					

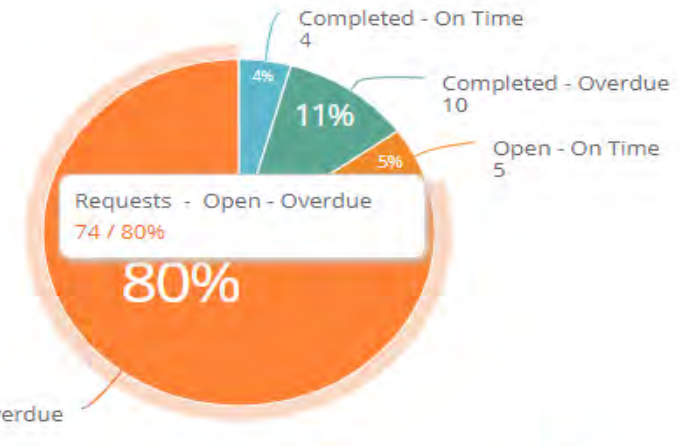




PM and Work Requests By Current State



Trend of Work Requests Created Per Month



Completed - On Time Completed - Overdue Open - On Time Open - Overdue



Operational Viability vs. Operational Vitality

...continued focus.

AMHS TUITION AND AFFORDABILITY 2024-2025

This is a Canva
template available
to everyone



BASE TUITION

- MISSION & CATHOLIC IDENTITY (Interior)
 - #1
 - #2
- ACADEMICS (Exterior)
 - #1
 - #2
- GOVERNANCE & LEADERSHIP (Safety/Security)
 - #1
- OPERATIONAL VITALITY (Functional)
 - #1
- CAMPUS LIFE (Warranty)
 - #1
 - #2

\$19,300

Automatic Tuition Subsidy -\$1,300

BASE TUITION \$18,000

ADDITIONAL FEES

- REGISTRATION FEE (1st time families) \$300
- RE-ENROLLMENT FEE (Returning families) \$250
This fee covers annual costs incurred immediately upon enrollment/re-enrollment.
- OTHER FEE
This fee covers something important \$50

ADDITIONAL DISCOUNTS

- SIBLING DISCOUNT (2nd sibling +) -\$250
- MILITARY DISCOUNT (per family) -\$200

PAYMENT PLAN OPTIONS

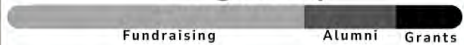
Payment plans are estimated off of base tuition, not including additional discounts or optional charges.

12 MONTH	11 MONTH	10 MONTH
\$1,500	\$1,637	\$1,800
per month	per month	per month

COST TO EDUCATE

\$19,300 - \$18,000 = \$1,300 Tuition Gap
per year base tuition per student, per year

Filling the Gap



TUITION DONATION OPTION

- AMHS FAMILIAS PARTNERSHIP** \$2,600
Cover the tuition subsidy for your child this year plus a child in need.
- AB MURPHY PARTNERSHIP** \$1,300
Cover the tuition subsidy for your child.

OPTIONAL

ADDITIONAL PROGRAMMING

- #1 \$50
- #2 \$100
- #3 \$75

ATHLETICS/CLUBS

- #1 \$250
- #2 \$350
- #3 \$200
- ASC ETC (monthly) \$200

10 YRS
of highest SAT
Scores in the
state

\$25 M
in scholarships
awarded last
year

3 YRS
"Best in Private
School" by
Seattle Times

"AMHS HAS PROVIDED THE EDUCATION AND COMMUNITY OUR CHILD NEEDED TO SUCCEED IN LIFE INCLUDING A FOUNDATION OF FAITH. IT WAS WORTH EVERY SACRIFICE AND MORE"

- SUPER HAPPY PARENT
SCAN FOR MORE INFO AND TO APPLY TODAY!



FEE STRUCTURES

**Payable at time of registration and/or enrollment.*

Sometimes, too many fees listed can seem like the “nickel and dime” effect.

What would you change?

Be strategic with the marketing of fees!

School #1

- **Registration***
 - \$180.00 per student - Non-Refundable
- **Tuition**
 - \$5,350 per student

School #2

- **Registration***
 - \$100 per student – Non-Refundable
- **General Fee***
 - \$400 per student
- **Family Fee***
 - \$325 per family
- **Graduation Fee ***
 - \$100 per 8th grade student
- **Tuition**
 - \$4,550



FEE STRUCTURES

DISCUSSION...

What do you notice now about school #2?

Be strategic with the marketing of fees!

School #2

- Registration
 - \$500 per student - Non-Refundable
- Tuition
 - \$497.50 per month (August to May)
 - \$452.27 per month (July to May)
 - \$414.58 per month (June to May)

School #2 (before discounts)

- Registration & Other Fees
 - Decreased fees by \$325 or \$425 if an 8th grade student
- Tuition
 - Advertised a monthly, more attractive amount
 - Increased tuition by \$42.50 a month
- Other
 - Looks more streamlined
 - Built a building fund of \$15,000



Month-end To Do Checklist...

2023

Coming



Task	Priority	Status	Start Date	Due Date	% Complete	Notes
Post FACTS GL Journal Entry in PSA	High	Not Started	August 1st	August 2nd	0%	Perform Weekly if needed - See FACTS ME Process Tab for Instructions
Reconcile #1405 AR Tuition & Fees	High	Not Started	August 1st	August 2nd	0%	See FACTS ME Process Tab for Instructions
Reconcile #1406 Interim Receivable	High	Not Started	August 1st	August 2nd	0%	See FACTS ME Process Tab for Instructions
Reconcile #1407 Payment at Institution	High	Not Started	August 1st	August 2nd	0%	See FACTS ME Process Tab for Instructions
Reconcile #2111 FACTS Refunds	High	Not Started	August 1st	August 2nd	0%	See FACTS ME Process Tab for Instructions
Prepare Accrual Entry to Recognize Income	High	Not Started	August 1st	August 2nd	0%	See FACTS ME Process Tab for Instructions
Review #1004 Petty Cash	High	Not Started	August 2nd	August 3rd	0%	Ensure within limits. Research and prepare necessary entries.
Review #1501 PrePaid Expenses	High	Not Started	August 2nd	August 3rd	0%	Research and reclass entries as needed.
Review #210x Series Accounts Payable	High	Not Started	August 2nd	August 3rd	0%	Research and reclass entries as needed.

Operational Success Plan

A Road Map for Schools

System of Support (SOS)



Purpose

To guide and assist school leadership in utilizing a process to strengthen school operational viability and sustain the mission of Catholic Education.

Monthly review of...

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

OPERATIONAL SUCCESS FORUM

Y4



CATHOLIC SCHOOLS
— ARCHDIOCESE OF SAN ANTONIO

Navigating Systems through Processes



Business Operations



Collaboration Opportunities



Peer to Peer Best Practices



A Network of Schools – *Stronger Together!*

DATA DRIVEN MINDSETS

ON YOUR CAMPUS!

“That which gets measured, gets managed.”

Cash Flow &
Financial Health

Enrollment
Trends &
Retention

Tour
Conversions

Marketing &
Advertising
Statistics

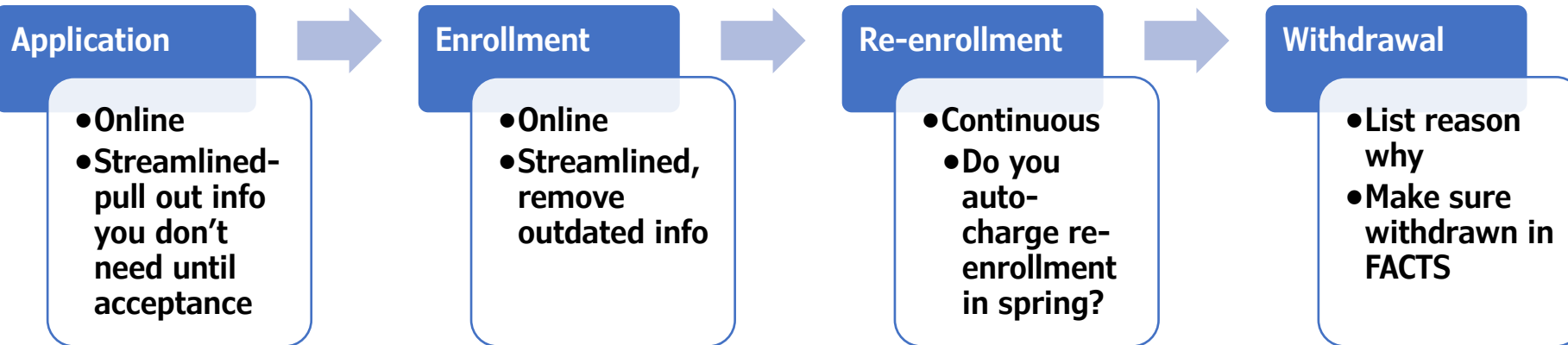
Customer Service
Efforts

Facility Needs



CATHOLIC SCHOOLS
— ARCHDIOCESE OF SAN ANTONIO —

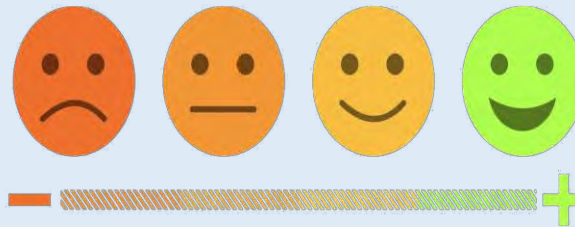
ENROLLMENT



Enrollment Numbers



Customer Service & Marketing Plans



Recruitment & Retention Strategies





Tuition Support Asistencia Financiera

Application and Notification Timeline
For the 2025 - 2026 School Year

Horario del proceso del solicitud y notificacion
Para el año escolar 2025 - 2026



DEC 1 Applications Open (Early Verification)

Primer día para recibir solicitudes



FEB 1 Regular Verification begins

Comienza la verificación regular



MAR 1 Early verification window closes

Se cierra el período de verificación temprana



MAR 7 Early Verification Award Notifications

Notificaciones de adjudicación de verificación temprana



MAR 21 Acceptance Due

Vence la aceptación



MAY 30 Rolling Awards Begin

Comienzan los continuos



JUNE 6 Rolling acceptances begin

Comienzan las aceptaciones continuas



For more information, please contact your school office.
Para obtener más información, póngase en contacto con la oficina de su escuela.



CATHOLIC SCHOOLS
— ARCHDIOCESE OF SAN ANTONIO —



COLLECTIVE MARKETING

Reimagined Tour Packets

ADMISSION CHECKLIST
 admissions@stgregorys.net
 (210) 342-0281 x 366

- 1 APPLY FOR ADMISSION**
 - VISIT WWW.STGREGORYSA.ORG
 - CREATE AN ONLINE ACCOUNT
 - SUBMIT ONLINE APPLICATION
- 2 SUBMIT REQUIRED DOCUMENTS**
 - MOST RECENT REPORT CARD, MAP GROWTH TESTING, STANDARDIZE TESTING, IEP (if applicable)
 - COPY OF BIRTH CERTIFICATE
 - COPY OF IMMUNIZATION RECORDS.
- 3 SCHEDULE AN APPOINTMENT**
 - PLACEMENT TEST (KINDER - 8TH GRADE)
 - ADMISSIONS INTERVIEW
 - CAMPUS TOUR AND/ OR SHADOW DAY

ST. GREGORY THE GREAT CATHOLIC SCHOOL

Our Mission We, the faith community of St. Gregory the Great Catholic School, in keeping with the Catholic tradition, nurture in our children and one another, spiritual, personal and academic growth through prayer and Christ-like service.

STG IN THE NUMBERS

- 5754 Map Growth Testing
- 6:1 Student to Teacher Ratio
- 15 Years of Catholic Education

Roadmap to Success
AT ST. GREGORY THE GREAT CATHOLIC SCHOOL

Sports, Clubs & Extra Curricular Activities

Household Sports: Football, Volleyball, Soccer, Basketball, Chess, Baseball, Softball, Track, Cross Country
Clubs: Robotics, Martial Arts, Drama, Mini Chess, Lego Club, Little Saints Club, Weekly Dance, BBQ Club.

Campus Contact 790 Dewhurst Road, San Antonio, TX 78213
 Phone: (210) 342-0281 x 366 Email: admissions@stgregorys.net

ST. GREGORY THE GREAT CATHOLIC SCHOOL

STAAR/ NWEA Data 2023-2024

Reading	Math	Science
75%	66%	78%
% of Students at or above grade level	% of Students at or above grade level	% of Students at or above grade level
State 45%	State 43%	State 47%
City 45%	City 33%	City 46%
District 1 45%	District 1 32%	District 1 57%

stgregorysa.org

AMHS INVESTMENT AND AFFORDABILITY 2024-2025

BASE TUITION	ADDITIONAL FEES												
PARSON & CATHOLIC (IDENTITY DISCOUNT) K1 K2 ACADEMICS (SCHOOL) K1 K2 GOVERNANCE & LEADERSHIP (SCHOOL/CONVENT) K1 K2 OPERATIONAL VIABILITY (PARSONS) K1 K2 CAMPUS LIFE (IDENTITY) K1 K2	REGISTRATION FEE (1st time families) \$100 RE-ENROLLMENT FEE (Returning families) \$150 This fee covers annual costs incurred immediately upon enrollment/re-enrollment. OTHER FEE This fee covers something important \$50												
Automatic Tuition Subsidy -\$1,300 BASE TUITION \$18,000	ADDITIONAL DISCOUNTS SIBLING DISCOUNT (2nd+ sibling K1) -\$250 MILITARY DISCOUNT (per family) -\$200												
PAYMENT PLAN OPTIONS Parents please see additional info at 8:00 tuition, and including additional discounts on payment plan page.													
	<table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th></th> <th>12 MONTH</th> <th>11 MONTH</th> <th>10 MONTH</th> </tr> <tr> <th></th> <th>per month</th> <th>per month</th> <th>per month</th> </tr> </thead> <tbody> <tr> <td>BASE TUITION</td> <td>\$1,500</td> <td>\$1,637</td> <td>\$1,800</td> </tr> </tbody> </table>		12 MONTH	11 MONTH	10 MONTH		per month	per month	per month	BASE TUITION	\$1,500	\$1,637	\$1,800
	12 MONTH	11 MONTH	10 MONTH										
	per month	per month	per month										
BASE TUITION	\$1,500	\$1,637	\$1,800										
COST TO EDUCATE \$19,300 - \$18,000 = \$1,300 Tuition Gap per year base tuition per student, per year Filling the Gap Fundraising Grants	TUITION DONATION OPTION AMHS FAMILIAS PARTNERSHIP \$2,500 Cover the tuition subsidy for your child this year plus school in-kind. MR MURPHY PARTNERSHIP \$1,300 Cover the tuition subsidy for your child.												
OPTIONAL ADDITIONAL PROGRAMMING: K1 \$50 K2 \$100 K3 \$75 ATHLETICS/CLUBS: K1 \$200 K2 \$300 K3 \$200 ASC ETC (monthly) \$200	<table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <tr> <td>10 YRS of tuition left before in the plan</td> <td>\$25 M in scholarships awarded last year</td> <td>3 YRS "Best in Private School" by Niche Times</td> </tr> </table> <p style="text-align: center; font-size: 0.7em;"> "AMHS HAS PROVIDED THE EDUCATION AND COMMUNITY OUR CHILD NEEDED TO SUCCEED IN LIFE INCLUDING A FOUNDATION OF FAITH IT WAS WORTH EVERY SACRIFICE AND MORE" - JAMES MURPHY FUND </p> <p style="text-align: center; font-size: 0.6em;">SCAN QR CODE HERE TO APPLY TODAY!</p>	10 YRS of tuition left before in the plan	\$25 M in scholarships awarded last year	3 YRS "Best in Private School" by Niche Times									
10 YRS of tuition left before in the plan	\$25 M in scholarships awarded last year	3 YRS "Best in Private School" by Niche Times											

CLICK HERE FOR THE CANVA TEMPLATE

COLLECTIVE MARKETING

*Reimagined Spotlights
with paid advertising*

SCHOOL SPOTLIGHT



INCARNATE WORD

9th-12th Grade: High School for Girls

- IWHS offers an incredible Aviation program
- Variety of athletics including basketball, cross country, volleyball, dance, golf, soccer, softball and more.
- Peer Ministry that fosters growth & community



LEARN MORE TODAY!
INCARNATEWORDHS.ORG



CATHOLIC SCHOOLS
— ARCHDIOCESE OF SAN ANTONIO —



CATHOLIC SCHOOLS
— ARCHDIOCESE OF SAN ANTONIO —

SCHOOL SPOTLIGHT



ST. JOHN BOSCO

6 weeks through 8th Grade

- Child development center onsite serving 6 weeks to 4 years old
- Sports for all ages, drama club and National Junior Honor Society
- Active presence from Salesian Sisters who help educate and encourage our youth.



LEARN MORE TODAY!
STJOHNBOSCO-SATX.ORG



CATHOLIC SCHOOLS
— ARCHDIOCESE OF SAN ANTONIO —

COLLECTIVE MARKETING

Feast days with paid advertising



FEAST DAY
OF
**ST. THOMAS
MOORE**

THOMAS MORVS QVONDAM SVPRE
TOTIVS ANGLIÆ CANCELLARIVS DIGNISS.
*Hic est iste Thomas plebis ac pulvere magni
Qui fuit in eam principis tra caput. A*



FEAST DAY OF
**ST. MARY
MAGDALENE**

"The story of Mary of Magdala reminds us all of a fundamental truth. A disciple of Christ is one who, in the experience of human weakness, has had the humility to ask for his help, has been healed by him and has set out following closely after him, becoming a witness of the power of his merciful love that is stronger than sin and death."

Pope Benedict XVI



billboard campaign

Nov 4th- Dec 2nd/ Jan 13th- Feb 9th



CATHOLIC SCHOOLS
— ARCHDIOCESE OF SAN ANTONIO —

OPERATIONAL VITALITY OVERVIEW

7 Guiding Biblical Principles for Financial Stewardship

- 1 Recognize God's Ownership**
All we have belongs to God (Psalm 24:1). Develop an attitude of gratitude and responsibility for the resources entrusted to us.
- 2 Live Within Your Means**
Be content with what we have (Hebrews 13:5). Establish a budget, limit debt and make responsible choices based on the current financial situation.
- 3 Save for the Future**
Saving for the future is essential to financial stewardship and allows us to be prepared for unexpected expenses and long-term goals (Proverbs 6:6-8).
- 4 Give Generously**
Give generously to support the work of the Church, assist those in need and advance God's kingdom (Mark 12:41-44).
- 5 Invest Wisely**
Invest wisely the resources entrusted to us (Matthew 25:14-30) by researching and making informed decisions. Prudent investing demonstrates commitment to financial stewardship and makes for a more significant impact with our resources.
- 6 Avoid Debt**
The dangers of debt can lead to financial bondage and limit our ability to serve God fully (Proverbs 22:7). While some debt may be unavoidable, it is crucial to minimize and manage debt responsibly.
- 7 Seek Godly Wisdom**
As in all aspects of life, including finances, the Bible encourages us to seek wisdom and guidance from God (James 1:5). Praying for discernment and consulting with wise counselors, we can make sound financial decisions that align with our faith and values.

By incorporating these seven biblical principles for financial stewardship, we can navigate the complexities of finances with faith and wisdom. As we acknowledge God's ownership, live within our means, save for the future, give generously, invest wisely, avoid debt, and seek Godly wisdom, we can develop a strong foundation for financial stewardship that honors God and enables us to use our resources for His purposes.

OSF Timeline by Quarter



COST TO EDUCATE = total expenses + # of students

School Overall Budget

Operational Budgets

- Forecasting Income & Expense
- Creating Staffing Models
- Calculating Cost to Educate
- Identifying Enrollment Trends

Supplemental Budgets

- Clubs & Organizations
- PTC
- Athletic Booster Clubs
- School Clubs & Organizations
- Alumni

SCHOOL OVERALL BUDGET



Ministry Agreement Termination Worksheet Sample

Termination Date:	
Annual Salary:	\$ 33,000.00
Daily Rate: 190 or 220 days	\$ 173.68
Daily Rate:	\$ 173.68
(x)Days Worked:	65
Total \$ due for days worked	\$ 11,289.47
Academic YTD Gross Base Pay	\$ 8,884.68
Amount owed for days worked	\$ 11,289.47
Owed/(Overpayment)	\$ 2,404.79

Payroll Schedule for Employees on Ministry Agreements

AUGUST 2024 THROUGH JULY 2025

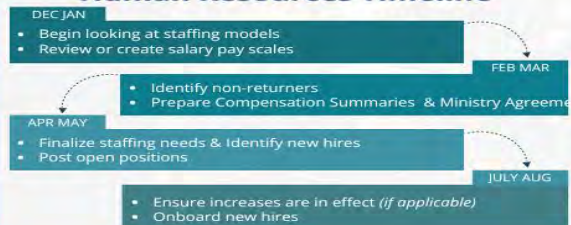
2024-2025 School Year				
Installments	PAY PERIOD		Installment Pay Date	Remaining Installments
	TIMESHEET APPROVAL	DUE BY 5:00 P.M.		
1	8/2/2024	8/9/2024	8/9/2024	26
2	8/13/2024	8/16/2024	8/23/2024	25
3	8/27/2024	8/30/2024	9/6/2024	24
4	8/31/2024	9/3/2024	9/20/2024	23
5	9/14/2024	9/27/2024	10/4/2024	22
6	9/28/2024	10/11/2024	10/18/2024	21
7	10/12/2024	10/25/2024	11/1/2024	20
8	10/25/2024	11/8/2024	11/15/2024	19
9	11/9/2024	11/22/2024	11/29/2024	18
10	11/23/2024	12/6/2024	12/13/2024	17
11	12/7/2024	12/20/2024	12/27/2024	16
12	12/21/2024	1/3/2025	1/10/2025	15
13	1/4/2025	1/17/2025	1/24/2025	14
14	1/18/2025	1/31/2025	2/7/2025	13
15	2/1/2025	2/14/2025	2/21/2025	12
16	2/15/2025	2/28/2025	3/7/2025	11
17	3/1/2025	3/14/2025	3/21/2025	10
18	3/15/2025	3/28/2025	4/4/2025	9
19	3/29/2025	4/11/2025	4/18/2025	8
20	4/12/2025	4/25/2025	5/2/2025	7
21	4/26/2025	5/9/2025	5/16/2025	6
22	5/10/2025	5/23/2025	5/30/2025	5
23	5/24/2025	6/6/2025	6/13/2025	4
24*	6/7/2025	6/20/2025	6/27/2025	3
25*	6/21/2025	7/4/2025	7/11/2025	2
26*	7/5/2025	7/18/2025	7/25/2025	1

* Indicates 3 installments for this month.
* Timesheets are not required to be approved during the summer months, unless you are under an Administrative Ministry Agreement and are actively working.

2025-2026 Budget Timeline

NOV & DEC 2024 Begin to collect historical data Begin to forecast out enrollment Begin meeting with lines of businesses Build/Review Salary Scales	JAN & FEB 2025 Begin to look at staffing models Begin to look at maintenance priorities Calculate Cost to Educate Propose & approve new tuition rates & fees	MAR & APR 2025 Continue to work on the budget Continue work on staffing models & non-renewals	MAY & JUN 2025 Update salary template with returning and new staff Enter preliminary budget in ParishSoft	AUG & SEPT 2025 Revise budget based on actual enrollment Approve final budget and enter in ParishSoft
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Human Resources Timeline



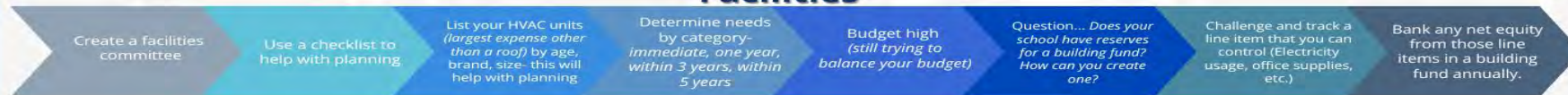
DATA DRIVEN MINDSETS

on your campus!

"That which gets measured, gets managed."

Income vs. Expense Cash Flow	Enrollment Trends & Retention	Tour Conversions	Marketing & Advertising Statistics	Customer Service Efforts	Facility Needs
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Facilities



Resources can be found on the DCS SharePoint: <https://archsa.sharepoint.com/:u:/r/sites/DCSArchSAPublic/SitePages/Home.aspx?csf=1&web=1&e=bMhz9g> | AUGUST 2024



OPERATIONAL VITALITY OVERVIEW

7 Guiding Biblical Principles for Financial Stewardship

- 1 Recognize God's Ownership**
All we have belongs to God (Psalm 24:1). Develop an attitude of gratitude and responsibility for the resources entrusted to us.
 - 2 Live Within Your Means**
Be content with what we have (Hebrews 13:5). Establish a budget, limit debt and make responsible choices based on the current financial situation.
 - 3 Save for the Future**
Saving for the future is essential to financial stewardship and allows us to be prepared for unexpected expenses and long-term goals (Proverbs 6:6-8).
 - 4 Give Generously**
Give generously to support the work of the Church, assist those in need and advance God's kingdom (Mark 12:41-44).
 - 5 Invest Wisely**
Invest wisely the resources entrusted to us (Matthew 25:14-30) by researching and making informed decisions. Prudent investing demonstrates commitment to financial stewardship and makes for a more significant impact with our resources.
 - 6 Avoid Debt**
The dangers of debt can lead to financial bondage and limit our ability to serve God fully (Proverbs 22:7). While some debt may be unavoidable, it is crucial to minimize and manage debt responsibly.
 - 7 Seek Godly Wisdom**
As in all aspects of life, including finances, the Bible encourages us to see wisdom and guidance from God (James 1:5). Praying for discernment and consulting with wise counselors, we can make sound financial decisions that align with our faith and values.
- By incorporating these seven biblical principles for financial stewardship, we can navigate the complexities of finances with faith and wisdom. As we acknowledge God's ownership, live within our means, save for the future, give generously, invest wisely, avoid debt, and seek Godly wisdom, we can develop a strong foundation for financial stewardship that honors God and enables us to use our resources for His purposes.*

Marketing & Enrollment Timeline by Quarter



TUITION GAP = (total expenses-tuition \$\$ received) ÷ # of students

Marketing Funnel for Schools



Marketing & Enrollment Focus



HFF Application Process



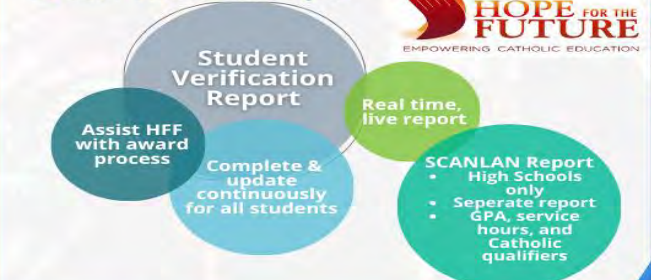
What Documents are Acceptable?



Need to Return an Award? No Problem!



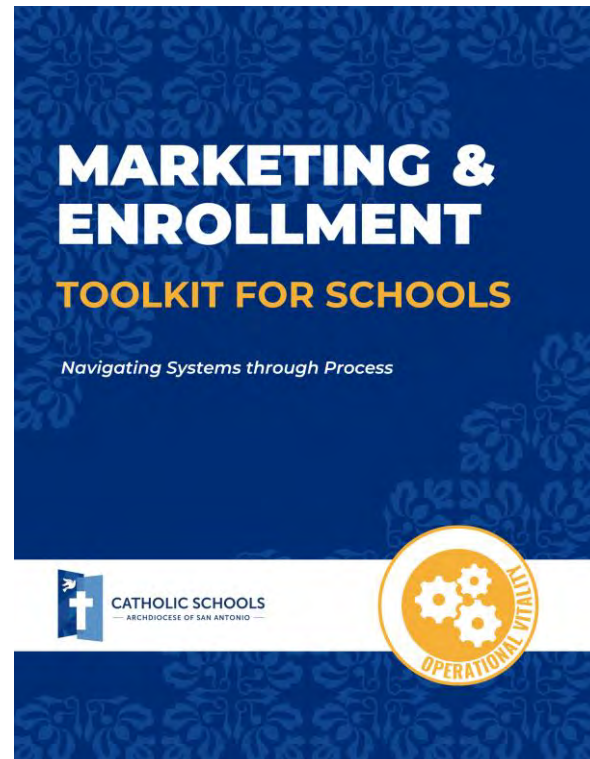
Student Verification Report



Resources can be found on the DCS SharePoint: <https://archsa.sharepoint.com/u:/r/sites/DCSArchSAPublic/SitePages/Home.aspx?csf=1&web=1&e=bMhz9g> | AUGUST 2024



MARKETING & ENROLLMENT TOOLKIT



- BRANDING
- WEBSITE
- SOCIAL MEDIA
- TOUR PROCESS
- ENROLLMENT
- MARKETING
- FUNDRAISING



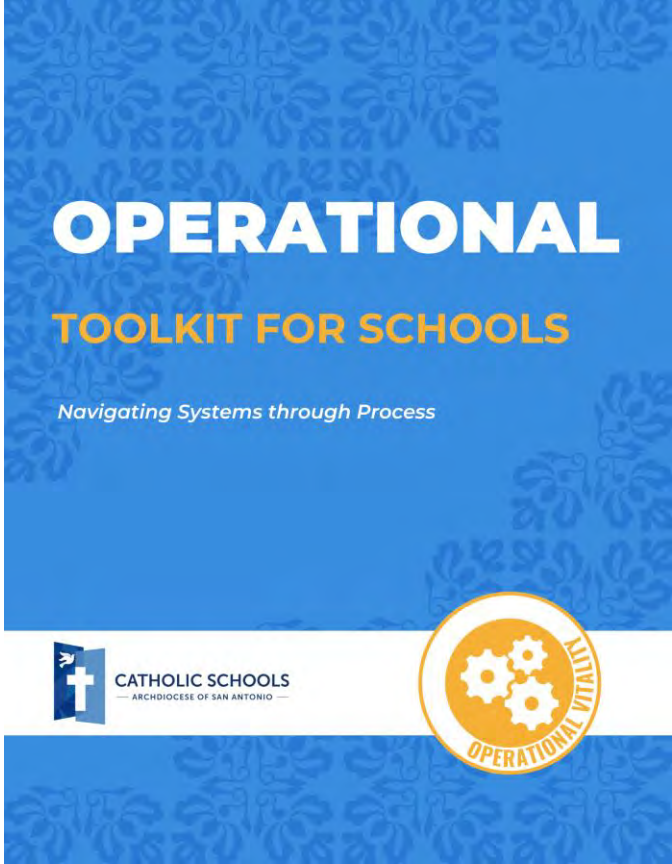
TECH TIP



CATHOLIC IDENTITY: *Recognize God's Ownership: All we have belongs to God (Psalm 24:1). Develop an attitude of gratitude and responsibility for the resources entrusted to us.*



OPERATIONAL TOOLKIT



- BUSINESS OPERATIONS
- HUMAN RESOURCES
- BUDGETS
- STUDENT ENROLLMENT
- HOPE FOR THE FUTURE
- FACILITIES



ZOOM SESSIONS



**Drop-In ZOOM
Sessions:**

Bookkeepers/Business
Managers

Enrollment/Marketing

Hope for the Future

30-minute sessions every Thursday



CATHOLIC SCHOOLS
— ARCHDIOCESE OF SAN ANTONIO —

Successes over the last 4 years...

Increased Participation in Meetings

Cohort Participation in all Lines of Business

Increased problem-solving skills

*Increased operational awareness at all levels:
Pastors, Principals, Business Managers, Enrollment*

Reduced financial support

Success Attributes

Came from within



Being present



Being available



Being collaborative



Being of service





OPERATIONAL SUCCESS FORUM

Y5

Navigating Systems through Processes for TEFA Readiness!



Operationally Ready!



Recruitment Manager & CRM



Mission Aligned

Growing our Catholic Schools through our Faith Communities



A Network of Schools – *Stronger Together!*



CATHOLIC SCHOOLS
ARCHDIOCESE OF SAN ANTONIO

Recruitment Manager

August & September

Built the CRM Database

Toured every campus

Created TEFA Liaisons in each school

Created a Diocesan Cohort to include Development, Communications, Pastoral Ministries & Academics

Partnered with the Marketing and Enrollment Director to create TEFA Rollout Playbooks (social media posts, newsletter inserts, scripts for pulpit talks, FAQ's and parent informational pieces)

WHO CAN APPLY?

Must be a **Texas resident**

Debe ser residente de Texas

Student must be a U.S. **citizen**, U.S. **national**, or lawfully admitted into the U.S.

El estudiante debe ser ciudadano de los EE. UU., nacional de los EE. UU. o admitido legalmente en los Estados Unidos

Must be eligible to enroll in a **Texas public school** (K-12)

Debe ser elegible para inscribirse en una escuela pública de Texas (K-12)

¿QUIÉN PUEDE SOLICITARLO?



INCOME GUIDELINES BY HOUSEHOLD SIZE



Number of people in household	200% of Poverty Guidelines Yearly Income	500% of Poverty Guidelines Yearly Income
2	\$42,300	\$105,750
3	\$53,300	\$133,250
4	\$64,300	\$160,750
5	\$75,300	\$188,250
6	\$83,920	\$215,750
7	\$108,300	\$270,750

Source: 2024 U.S. Department of Health and Human Services (HHS) Federal Poverty Guidelines. Figures are approximate and used to estimate eligibility for TEFA income tiers.

TEFA PRIORITY GROUP ¹

Children with a **disability** whose family income is at or below **500% of FPL** (Family of 4: **~160,750**)

Niños con **una discapacidad** cuyo ingreso familiar es **igual o menor al 500 % del nivel federal de pobreza (FPL)** (Familia de 4: aproximadamente \$160,750)

Number of people in household	200% of Poverty Guidelines Yearly Income	500% of Poverty Guidelines Yearly Income
2	\$42,300	\$105,750
3	\$53,300	\$133,250
4	\$64,300	\$160,750
5	\$75,300	\$188,250
6	\$83,920	\$215,750
7	\$108,300	\$270,750

¹ GRUPO DE PRIORIDAD DE LA TEFA

TEFA TIMELINE

FEBRUARY 4, 2026



Applications Open -

Apply for TEFA through the Texas Comptroller's official portal.

MARCH 17, 2026



TEFA Application Closes -

The application window closes. The Comptroller reviews submitted documentation, including Priority Group 1 applications.

EARLY APRIL
2026



Award Notifications -

Families receive award decisions through the Odyssey portal.

Selected schools are notified of awarded students.

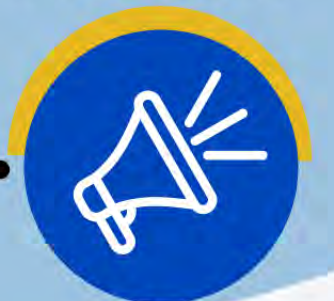
MAY - JUNE 2026



Next Steps & School Engagement -

Awarded families attend information sessions. Prospective families schedule school visits and finalize decisions.

JULY 2026



Enrollment Deadline & First Payment -

Students must be enrolled in a TEFA-participating school by July 1. The first payment (25%) is issued once enrollment is confirmed.

HOW DO I APPLY?

- Families will apply through the Texas Comptroller's official TEFA online portal.
- The portal will guide families step-by-step through eligibility, required documents, and verification.
- Approved schools, including Catholic and private schools, will appear in the state's list of registered providers.

- Las familias presentarán su solicitud a través del portal en línea oficial del Contralor de Texas para el programa TEFA.
- El portal guiará a las familias paso a paso en el proceso de elegibilidad, documentos requeridos y verificación.
- Las escuelas católicas y privadas aprobadas aparecerán en la lista estatal de proveedores registrados.

¿CÓMO SOLICITO?





FEB 4, 2026
Applications open
MARCH 17, 2026
Application Close Date

A GUIDE TO TEFA FOR FAMILIES



Senate Bill 2 established TEFA to help families access funds for approved educational expenses starting in 2026–27. With final rules released on November 25, 2025, families now have clarity on how the program will work.

ELIGIBILITY

Any Texas resident **eligible for public school (PK–12)** may apply.

This includes:

- Children entering PK3–PK4 who meet Texas eligibility
- Students currently in public, private, or homeschool settings
- Students with TEFA qualifying disabilities

There is no income limit to apply, but awards are offered based on State priority groups.

PRIORITY GROUPS

BASED ON THE FPL (FEDERAL POVERTY LEVEL)



FEDERAL POVERTY LEVELS

Household Size	200% of FPG Yearly Income	500% of FPG Yearly Income
2	\$43,280	\$108,200
3	\$54,640	\$138,600
4	\$66,000	\$165,000
5	\$77,360	\$193,400
6	\$88,720	\$221,800
7	\$100,080	\$250,200

ALLOWABLE EXPENSES

Tuition/Fees	Books/Materials	Tutoring	Therapies	Meals	Assessments	Technology	Transportation
Participating Private Schools			Therapies not covered by government or private insurance.	Provided at school for a fee		10% Cap	Commercial Only
✓	✓	✓	✓	✓	✓	✓	✓

*All purchases must be through the TEFA portal from approved providers.

\$10,474

TEFA Funding Amount for the 26–27 School Year

Award per student (85% of public funding).

Additional funding may be awarded based on a student's IEP for disabilities - up to \$30,000.

PARENT: As defined by Education Code, §29.351(5), a resident of this state who is a natural or adoptive parent, managing or possessory conservator, legal guardian, custodian, or other person with legal authority to act on behalf of a child.

PARENT RESPONSIBILITY

Families must:

- Use funds only for approved expenses
- Not withdraw cash or request reimbursement
- Keep receipts
- Ensure annual testing (Grades 3–12)
- Report public school enrollment
- Follow all TEFA rules

APPLICATION REQUIREMENTS

- 1 Proof of Residency
 - Texas ID/driver's license or,
 - Lease or mortgage statement or,
 - Utility bill or,
 - Voter registration
- 2 Proof of Income
 - Most recent tax return (2024 or 2025)
- 3 Proof of Citizenship
 - Social Security Number (SSN) or Individual Taxpayer Identification number for the parent and,
 - SSN for the child(ren) or,
 - Birth Certificate for child(ren)

WHAT IF FUNDS RUN OUT?

If funds run out, eligible students go on a state waitlist.

If more funds become available, awards may be offered mid-year, prorated, and begin the month after approval.

STUDENT DOCUMENTS – PROOF OF CITIZENSHIP

If your child's Social Security number (SSN) cannot be verified, proof of lawful status may be provided by uploading one of the following documents:

- A report of birth abroad
- A certificate of citizenship
- A certificate of naturalization
- Other official documentation that confirms lawful admission



CATHOLIC SCHOOLS
— SCHOOLS OF SAN ANTONIO —



SACATHOLICSCHOOLS.ORG
FOR MORE INFORMATION



V04:1.23.26

A GUIDE TO TEFA

PRE-K, Siblings & Students with Disabilities



PRIORITY GROUP #1

BASED ON THE FPL (FEDERAL POVERTY LEVEL)

≤ 500% & Children with qualifying disabilities

FEDERAL POVERTY LEVELS

Household Size	200% of FPG Yearly Income	500% of FPG Yearly Income
2	\$43,280	\$108,200
3	\$54,640	\$138,600
4	\$66,000	\$165,000
5	\$77,360	\$193,400
6	\$88,720	\$221,800
7	\$100,080	\$250,200

\$10,474 – \$30,000

Award per student (85% of public funding).
Additional IEP-based funding for disabilities - up to \$30,000 total.

PRE-K ELIGIBILITY REQUIREMENTS

PK ages 3–5 qualify if they meet Texas public PK eligibility criteria (emergent bilingual, economically disadvantaged, homeless, military, foster, child of district employee, or Star of Texas).

TEFA QUALIFYING DISABILITIES EXPLAINED

A student with special needs (Tier 1) is defined as a child age 21 or younger with a disability listed in Texas Education Code §29.003 that requires special services to be adequately or safely educated in a public school. Eligible conditions include Autism, Deaf-Blindness, Deaf or hard of hearing, emotional disability, intellectual disability, multiple disabilities, Orthopedic impairment, other health impairment, specific learning disability, speech impairment, traumatic brain injury, visual impairment, developmental delay, and noncategorical early childhood.

SIBLING PRIORITY

Siblings as defined by Education Code, §29.351(9), are: A brother, sister, stepbrother, stepsister, half-brother, half-sister, or a foster brother or sister who is a dependent of the participating parent and has been placed with the participating parent by an authorized placement agency or by judgment, decree, or other order of a court of competent jurisdiction.

OPTIONAL DOCUMENTATION

For Prioritization Purposes:

- TEFA Disability Certification Form approved by the Texas Comptroller of Public Accounts (only required if the student requires special education services and does not have an official Individualized Education Program (IEP) on file with the Texas Education Agency (TEA).
- A Texas Individualized Education Program (IEP) or out of state IEP
- A Full Individual & Initial Evaluation (File)

For Additional Funding and Prioritization:

- Texas IEP

IMPORTANT:

A TEFA Disability Certification Form, completed and signed by a licensed professional qualified to certify a child's disability, may be used for prioritization purposes.

However, additional disability-based funding can only be determined if the student has a valid Individualized Education Program (IEP) on file.

WHAT'S NEXT?

When applications open on the Texas Comptroller website, you will apply and select one approved school. Upon completion, eligibility will be determined. Award notifications are expected to go out the first week of April. If your child is selected, you'll receive instructions to accept the award in the TEFA portal. Your child's TEFA account is then created so you can choose approved schools, providers, and services.



CATHOLIC SCHOOLS
— SCHOOLS OF SAN ANTONIO —



SACATHOLICSCHOOLS.ORG
FOR MORE INFORMATION



TEFA Activities

October, November &
December

TEFA Information Session held at schools, parishes, CYO meetings and community events begin

Inquiries begin to roll into the CRM and shared with schools

Monthly meetings with state counterparts begin

TEFA ready graphics for church bulletins are shared with parishes

Support Letter from Archbishop is distributed to Pastors

Partnered with Business Operations to begin preliminary budget process with a concentration on tuition and fee analysis, discount structures and capacity by class with current staffing vs. facility capacity

TEFA Activities

January, February & March

Intentional marketing through TV commercials (English & Spanish) and print media (partnered with Catholic School's Week)

Intentional focus on a welcoming school culture (facilities, tours, tour packets, tuition and affordability sheets and special education plans)

Church pulpit talks and participation in community engagement events continue

February 4 – TEFA application opens

Virtual and In-person application walk-through sessions provided

Troubleshoot Support for issues/questions offered to families

March 31 – TEFA applications close (extended by 2 weeks)

Partnered with FACTS, coding logistics for parent tuition agreements and internal accounting mapping begins

TEFA Activities

April & May

Training on FACTS Parent Tuition Payment Agreements (focus on family intent forms, building TEFA specific invoice agreements, managing AR and compliance with state requirements)

Readiness to assist families with finding the right school (Special Education services) and finding a school when their first-choice school is full

Building easy to read flow charts to help families and schools navigate the process

Building a “What’s Next” Frequently Asked Questions document to help clarify the process if awarded or not awarded

Building an Affordability document to help families plan for the future

This Friday, April 17 – TEFA Awarding notifications go out to parents

TEFA STATISTICS

Archdiocese of San Antonio

57 TEFA Informational Sessions

852 Commercial Spots ran over 3 major media outlets (Super Bowl and Olympics coverage)

27 Pulpit Talks Delivered (not including Parishes with Schools)

23 Application Walk-through Sessions

56 Individual Zoom Application Support Sessions

9,178 Contacts in the HubSpot CRM

125% Increased Inquiries from the prior year (2025-26)

TEFA STATISTICS

State of Texas
What we know...

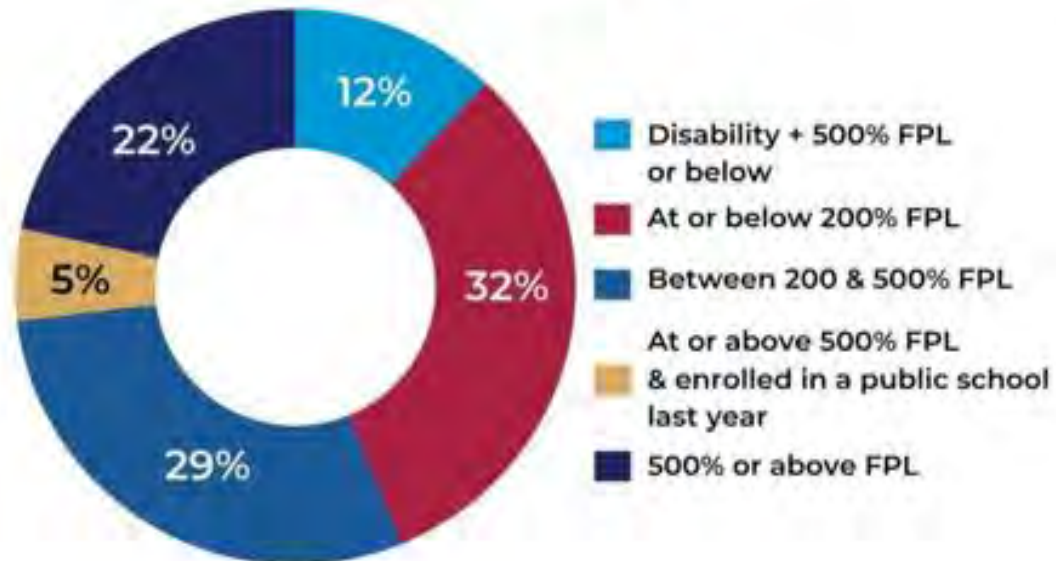
274,183 Applications Submitted State-wide

30,815 Applications Submitted in San Antonio area

Y1 Need is greater than funding – Lottery will start in Tier 2

Approximately 77% of applicants are currently in private schools

PRIORITY TIER



App Breakdown

Tier 1: 32,901

Tier 2: 87,738

Tier 3: 79,513

Tier 4 (transfers): 13,709

Tier 4: 60,320

TEFA Debrief

Need for School Growth

Strategic Plan for Y2

- ✓ **Strengthen Parish Partnerships Earlier**
 - ✓ Partner with Pastors and Directors of Religious Education
 - ✓ Parent Presentations
 - ✓ *In our pews*
- ✓ **Increase Pulpit Talks**
 - ✓ Expand in the Fall when parents are making school decisions
- ✓ **Monthly Information Sessions near At-Risk Schools**
 - ✓ Identify schools with capacity or declining enrollment and increase informational sessions
- ✓ **Continue Personalized Application Support**
 - ✓ Maintain 1:1 Zoom appointments & application workshops
- ✓ **Continue Media Outreach**
 - ✓ Build a 2026-27 media campaign using success analytics
- ✓ **Equip Schools with Outreach Tools**
 - ✓ Continue ready-to-use, shorter outreach materials
- ✓ **Expand Community Partnerships**
 - ✓ Daycares
 - ✓ Catholic Charities
 - ✓ CYO
 - ✓ YMCA
 - ✓ Homeschool Networks



Thank you!

*Wishing you much success
and many blessings!* 🏫

Chana Finch
ASSOCIATE SUPERINTENDENT
OF BUSINESS OPERATIONS



CATHOLIC SCHOOLS
— ARCHDIOCESE OF SAN ANTONIO —

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