

Vitality Index Definitions

	Lever	Description	Metric - Triggers
1)	Other Funding Sources	Money raised other than tuition or envelope & plate (Fundraising, Donations, Funding from Outside Sources)	Above 15% of total school cost to educate
2)	Cost to Educate	Total cost to operate school divided by enrollment	More than +/- 15% from average
3)	Tuition (Net Collected)	Average actual money collected per student	Below 50% of the cost to educate
4)	Capital Repair and Replacement Schedule - School	Estimates of substantial building expense next 5 years	>2x parish envelope & plate
5)	Capital Repair and Replacement Schedule - Parish	Estimates of substantial building expense next 5 years	>2x parish envelope & plate
6)	Parish Investment in the School	Parish support of school ministry	Above 30% of envelope & plate
7)	Envelope & Plate	Financial stewardship from parishioners	Down vs. prior year
8)	Problematic Debt	Debt load high or growing	Debt greater than 3x annual envelope & plate
9)	Enrollment (Volume Variance)	Enrollment low or declining	Below 100 students
10)	Tuition (Price Variance)	Net tuition collected per student – assesses market ability to pay	Above 40% free and reduced lunch

Archdiocesan Financial School Report Summary Data

Fiscal Year 2018 - 2019 K - 8 Schools

(Based on 74 of 76 Schools)

	Averages				Average	Archdiocesan - Wide	Your School, Your City	Vitality Index Triggers	Lower Quartile	Upper Quartile
	Enrollment <100	Enrollment 100-200	Enrollment 201-350	Enrollment >350						
Tuition Collected (NET)	\$206,088	\$510,273	\$941,734	\$2,415,157	\$848,384	\$62,780,384	\$692,185	☑	\$306,116	\$1,133,569
Tuition Collected Per Student	\$3,228	\$3,470	\$3,535	\$4,849	\$3,644	\$3,944	\$3,889		\$2,917	\$4,421
Tuition as a % of Total Revenue	33.00%	47.55%	51.42%	71.96%	49%	55.14%	64.84%		37.77%	63.22%
Other Funding (Fundraising, Donations, Funding from Outside Sources)	\$202,713	\$258,638	\$463,451	\$308,297	\$310,038	\$22,942,832	\$198,013		\$140,579	\$370,529
Other Funding Per Student	\$2,998	\$1,833	\$1,617	\$659	\$1,836	\$1,441	\$1,112		\$836	\$2,024
1 Other Funding as a % of Cost to Educate	29.92%	23.12%	22.64%	9.77%	23.18%	19.97%	16.78%		11.21%	24.72%
Total Expenses Per School	\$662,920	\$1,111,330	\$1,902,534	\$3,253,415	\$1,552,693	\$114,899,266	\$1,180,208		\$900,141	\$1,905,422
2 Cost to Educate Per Student	\$10,246	\$7,800	\$7,064	\$6,610	\$7,920	\$7,219	\$6,630		\$6,299	\$8,984
Salaries & Benefits as a % of Total Operating Expenses	76.12%	76.17%	77.66%	79.27%	77.02%	77.50%	75.32%		72.61%	81.44%
3 Tuition Collected Per Student as a % of Cost to Educate	31.66%	45.64%	50.69%	73.97%	48.38%	54.64%	58.65%		33.33%	62.14%
4 Capital Repair & Replacement Plan (CRR) - School CRR - School as a % of Parish Contributions	*Data will be provided in the future, not enough participation to produce relevant data						\$0 0.00%			
5 Capital Repair & Replacement Plan (CRR) - Parish CRR - Parish as a % of Parish Contributions							\$0 0.00%			
Parish Investment Per School	\$191,140	\$201,675	\$393,126	\$435,339	\$286,017	\$21,165,240	\$136,303		\$147,377	\$380,916
Parish Investment Per Student	\$3,053	\$1,445	\$1,483	\$860	\$1,695	\$1,330	\$766		\$897	\$2,259
Parish Investment as a % of Total School Operating Revenue	34.31%	20.31%	21.17%	11.87%	21.96%	18.59%	12.77%		11.83%	30.24%
6 Parish Investment as a % of Envelope / Plate (Parish Schools Only)	34.51%	24.17%	25.93%	21.70%	26.33%	30.44%	11.60%		17.92%	32.92%
7 Total Parish Plate & Envelope Revenues	\$709,429	\$898,642	\$1,425,435	\$1,848,537	\$1,139,744	\$69,524,364	\$1,175,294		\$924,304	\$2,020,062
8 Debt *Must be provided by the parish for this purpose							\$0			
	Enrollment <100	Enrollment 100-200	Enrollment 201-350	Enrollment >350	Average	Archdiocesan - Wide	Your School, Your City		Lower Quartile	Upper Quartile
9 2019 K-8 Enrollment	67	144	271	496	215	15,917	178		113	288
Free and Reduced Lunch Students	12	33	51	13	31	2,259	39		6	34
10 Free and Reduced Lunch as a % of Enrollment	17.96%	22.90%	18.82%	2.62%	17.63%	14.19%	21.91%		3.52%	24.03%
	Number of Schools with Enrollment of:									
	<100 15									
	100-200 28									
	201-350 20									
	>350 11									

Note: Results are currently in the process of being standardized. Results at this time may not necessarily be exactly comparable between schools.