



P.O. Box 4071  
Madison, CT 06443  
(203) 421-5169

www.catholicschoolmgmt.com

CATHOLIC SCHOOL MANAGEMENT

# Letter

SM

A publication of  
Catholic School  
Management, Inc.

Richard J. Burke, *President*  
Jacqueline Abrahams  
Shirley A. Arnold  
Edward J. Barrett  
Joseph W. Bracco  
Albert E. Catelli  
Carol Cimino, SSJ, Ed.D.  
Michael M. Denison  
Lois K. Draina, Ph.D.  
Donald L. Edwards, Ed.D.  
Rachel L. Ellingson  
Richard E. Feitel  
Gary J. Gelo  
Frank A. Glowaty  
Stephen J. Hammond  
Susan R. Hoffman  
Joseph D. Hollowell  
Jennifer C. Kensel  
Kevin M. McDonough  
Richard J. McGrath, OSA, Ph.D.  
Aline P. Norwood  
Deborah L. Papa  
G. Joseph Peters  
Thomas H. Posnanski  
Kim R. Pryzbylski, Ph.D.  
Maria J. Ribera  
Mary Beth Riley  
Mary Lou Schoone  
Robert S. Webb  
Nicholas M. Wolsonovich, Ph.D.  
Frederick Zilian, Ph.D.

**November 2013**

**Volume XXXV, No. 2**

## **Dashboard Indicators for Monitoring the Effectiveness and Vitality of Catholic Schools: Utilizing Metrics to Drive Mission Success**

Catholic School Management consultants have long recommended “data-driven decision-making” for Catholic school administrators and Board members. Unfortunately, all too often the required data is unavailable or not made available in a usable format. Over the past decade much has been written about dashboard indicators, and more recently the utilization of “digital dashboards.” While such dashboards do not take the place of in-depth analysis, they are extremely useful for gathering information and for monitoring trends. Indeed, similar to the instrument panel on the dashboard of one’s car, dashboard reports present fast, easy-to-read, statistical information on a school’s current status as well as overall trends and direction.

Catholic School Management has developed a proposal for creation of a digital dashboard for Catholic schools to be developed in collaboration with practitioners, the business and computer engineering schools of Catholic colleges, and Catholic professional organizations. In the interim, it is recommended that school administrators and Board members work together to track key metrics (“dashboard indicators”) in several areas. At the very least, detailed information should be assembled regularly in each of the following areas:

- Enrollment;
- Finances;
- Staffing;
- Development/Institutional Advancement;
- Academic Affairs;
- Student Activities;
- Catholic Identity/Faith Community Affairs.

The following presents categorically key information that should be gathered and presented for administrative and Board review and analysis on a regular and periodic basis. Please note that in each case a recommendation is made as to whether the information should be presented to the Board monthly (M), quarterly (Q), or annually (A).

### Enrollment

- Total enrollment by grade over the past six to ten years (A).
- Student retention numbers and percentages (M).
- # of inquiries for school admission (M).
- # of applications for admission (M).
- # of acceptances (M).
- # of deposits (A).
- Total attendance/matriculation (A).
- Admissions funnel (inquiries, applications, acceptances, deposits, and attendance/matriculation) in longitudinal format over last six to ten years (A).
- Total enrollment as a % of capacity (A).

### Finances

- Operating budget (A).
- Operating budget growth over the past six to ten years (A).
- Overlay budget growth with enrollment over time (A).
- Cost-per-pupil (total expenditures less depreciation and capital divided by # of students (A).
- Accounts payable (M).
- Accounts receivable (M).
- Financial aid as a percent of total tuition yield (A).
- Financial aid in terms of total enrollment (A).
- Financial aid – # of students – as a percent of student body (A) – expressed as a percentage of total families.
- # of students receiving financial aid – longitudinal (A) – expressed as a percentage of total families.
- % of families receiving financial aid – longitudinal (A) – expressed as a percentage of total families.

- # of families paying tuition in a single payment (A) – expressed as a percentage of total families.
- # of families paying tuition in two payments (A) – expressed as a percentage of total families.
- # of families paying tuition in three payments (A) – expressed as a percentage of total families.
- # of families paying tuition monthly (A) – expressed as a percentage of total families.
- Year-end delinquent tuition (both # of families and dollar amount) – longitudinal (A).
- Year-end uncollectible tuition (# of families and dollar amount) – longitudinal (A).

### Staffing

- Full-time teachers (A) – longitudinal (shown in comparison to enrollment).
- Part-time teachers (A) – longitudinal (shown in comparison to enrollment).
- FTE teaching staff (A) – longitudinal (shown in comparison to enrollment).
- # of full-time administrators (A) – longitudinal (shown in comparison to enrollment).
- # of part-time administrators (A) – longitudinal (shown in comparison to enrollment).
- FTE administrators (A) – longitudinal.
- # of support staff (A) – longitudinal (shown in comparison to enrollment).
- Student/teacher ratio (A) – longitudinal (shown in comparison to enrollment).
- Student/staff (A) – longitudinal (shown in comparison to enrollment).
- Administrative turnover (A) – longitudinal (shown in comparison to enrollment).

### Development/Institutional Advancement

- Development income (M).
- Development income over the past six to ten years (A) – longitudinal.
- Annual Fund over the past six to ten years (A).
- Unrestricted gifts over the past six to ten years (A).
- Restricted gifts over the past six to ten years (A).

- Pledges/Gifts to endowment over the past six to ten years (A).
- Endowment growth – longitudinal (A).
- Endowment distribution (A).
- Planned gifts (described by type) (A):
  - Bequests;
  - Life insurance;
  - Annuity trusts;
  - Charitable remainder trusts;
  - Charitable lead trusts;
  - Gifts of property;
  - Other.
- # of cultivation calls per month (M).
- # of cultivation calls annually (A).
- # of solicitation calls per month (M).
- # of solicitation calls annually (A).
- Total expenditures for development office (A).
- Cost per dollar raised (total development costs divided by total development income) (A).

#### Academic Affairs

- Staffing profile (% with bachelors, masters, advanced degrees, state certified) (A).
- FTE specialized staffing for learning support (i.e., reading specialists, learning resource specialist, learning intervention specialist, etc.) (A).
- FTE technology staffing devoted to technical support – instructional support (A).
- Technology device to student and to teacher ratios (A).
- Counselor to student ratio (middle, junior, and high school programs) (A).
- Elementary schools – baseline academic data and related data (will vary based on standardized test used) (A):
  - % proficient/advanced, percentile and national percentile ranking, etc.;
  - # of students selected for gifted/talented programs (i.e., Duke TIP, etc.);
  - Scholarship dollars offered to graduating 8th grade students;
  - Scholarship dollars awarded to graduating 8th grade students.

#### Catholic Identity/Faith Community Affairs

- Full school liturgies (A).
- Full school para-liturgical services (A).
- Class liturgies (A).
- Class para-liturgical services (A).
- Total # of students performing community service or participating in Community Service Learning Programs (A).
- Total # of service hours provided (A).
- # of participants in retreats (A).
- Catholic/Non-Catholic student ratio (A).
- # of parishes represented (with or without schools) (A).

#### Student Activities

- # of sports offered (A).
- # and % of students participating (A).
- # of clubs/activities offered (A).
- # and % of student participation in clubs/activities (A).



Catholic School Management, Inc. is a full-service, comprehensive, consulting organization supporting Catholic Education with research, direct consultative guidance, training programs and publications. CSM provides the highest level of professional and personalized service to Catholic educational institutions both within the United States and internationally.

For more information about services, publications and training programs, write Catholic School Management P.O. Box 4071 Madison, CT 06443-4071 or call (203) 421-5169 or visit our web site at: [www.catholicchoolmgmt.com](http://www.catholicchoolmgmt.com).

The above-mentioned metrics provide a “snapshot” of a school’s current realities based on data points applicable to all Catholic schools. It is equally important that each Catholic school pay attention to unique internal and external factors related to its current and long-term sustainability.

For external consideration, school leaders should engage in demographic studies to understand better the makeup of their local communities at the current time, as well as projections for the future. Population studies should include not only general census data but specific projections for groupings of school-age children. A school’s enrollment is inevitably connected to its available pool of applicants; therefore, schools must be proactive in planning for changes representative of increases or decreases that may be anticipated in their local communities. At the current time, schools are facing the national reality that the total population of Generation X (born between 1965-1984) is significantly less (by 11%, or 9 million) than the total population of the Baby Boomers which preceded them. The majority of prospective and current parents are members of this smaller Generation X. Generation Y (born between 1985 and 2010), on the other hand, represents what will be 100 million people, a significant increase from the 69.5 million Generation Xers. Along with population statistics, ensuring understanding of median income levels and related changes are also data points that can have bearing on the setting of tuition.

At the internal level, schools must keep a strong watch on the reasons why students and families choose their school as well as the reasons why students and families may choose to leave their school. Catholic School Management advocates for close tracking of enrollment, particularly changes in current enrollment due to students either entering or leaving the school, with updates on an at least quarterly basis being provided to administrators and Board members. Understanding why families and students choose a school provides valuable feedback for evaluating, altering, or expanding marketing strategies for the best return on investment. Understanding why students and families choose to leave a school provides valuable feedback, in concert with data from annual satisfaction surveys, as to how well a school is meeting, and exceeding, the wants and needs of its community. A simple spreadsheet program can be used to track such data as well as to calculate annual and longitudinal student attrition rates and reasons. At a minimum, reasons for attrition should include:

- Academics;
- Asked to Leave;
- Finances;
- Moving;
- Not Happy;
- Personal;
- Other.

School administrators and Board members must work together to track key metrics or “dashboard indicators” in the areas of Enrollment, Finances, Staffing, Development/Institutional Advancement, Academic Affairs, Student Activities, and Catholic Identity/Faith Community Affairs. Utilizing and monitoring these metrics will drive mission success and ensure the effectiveness and vitality of the Catholic school.

© Copyright 2013 Catholic School Management, Inc., Richard J. Burke, President, P.O. Box 4071, Madison, Connecticut 06443

*This material may not be reproduced in whole or in part without written permission. Published in September, November, January, March, May and July.*

*CSM and Catholic School Management Letter are registered trademarks of Catholic School Management, Inc.*