

National Standards and Benchmarks for Effective

Catholic Elementary and Secondary Schools

Rubrics for Benchmarks

Standard 10: An excellent Catholic school provides a feasible three to five year financial plan that includes both current and projected budgets and is the result of a collaborative process, emphasizing faithful stewardship.

Benchmark: 10.1

The governing body and leader/leadership team engage in financial planning in collaboration with experts in non-profit management and funding.

Level 4 Exceeds Benchmark	The governing body and leader/leadership team engages in financial planning using a well-defined and high-quality process that benefits from the leadership of acknowledged experts in the field of non-profit or educational management and planning. The process is well documented, followed, and evidences a wholly collaborative relationship between school leaders, the governing body and the experts in question.
Level 3 Fully Meets Benchmark	The governing body and leader/leadership team engage in financial planning in collaboration with experts in non-profit management and funding.
Level 2 Partially Meets Benchmark	The governing body and leader/leadership team engages in financial planning; however, planning is done with only limited input from people with significant experience /expertise in non-profit planning and management, or The advice and input of those experts is largely excluded or ignored, and so has limited input on the final outcome, or Financial planning is done, but in an ad-hoc manner without a defined and agreed-to process.
Level 1 Does Not Meet Benchmark	There is no formal planning process involving the school's leaders, or The school's governing body is not part of the leader's planning process, or No experts in non-profit or educational management are consulted.
Possible Sources of Evidence	<ul style="list-style-type: none">• Documented planning process• Governing body meeting agendas, meeting minutes, communications, reports and records of actions taken• Surveys of planning process participants (to determine self-

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	<p>perception of involvement and self-perception of having “been heard”)</p> <ul style="list-style-type: none">• Interviews with those experts involved in the process (perception of involvement, time spent, expert’s assessment of the quality of the outcome)• Resume/CV (or other qualifications documentation) for the experts involved in the process (level of experience & expertise)
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Benchmark: 10.2