

ECCA Implementation

Creating Synergy with Stakeholder Groups to Maximize
Funding and Enrollment Opportunities for Families



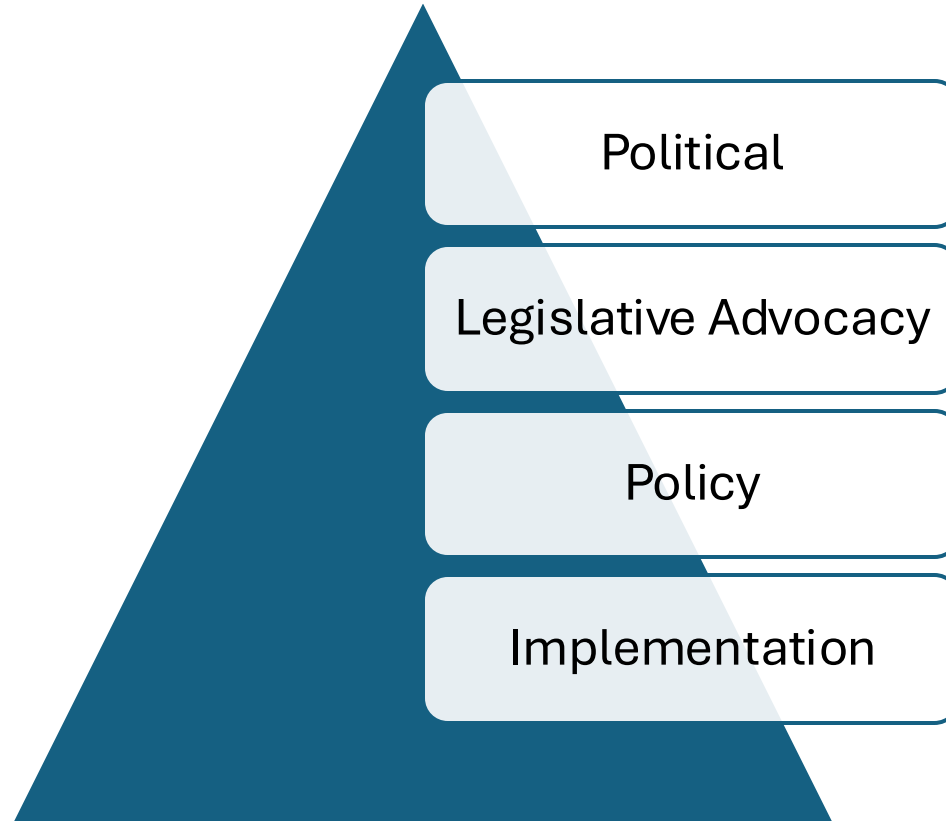
AMERICAN FEDERATION *for* CHILDREN

American Federation for Children (AFC)

- National school choice organization that engages in the establishment, expansion, and defense of school choice programs nationwide
- AFC's Mission:
 - We seek to empower families, especially low-income families, with the freedom to choose the best K-12 education for their children. We believe all parents should have a wide range of high-quality educational options to choose from, regardless of income.

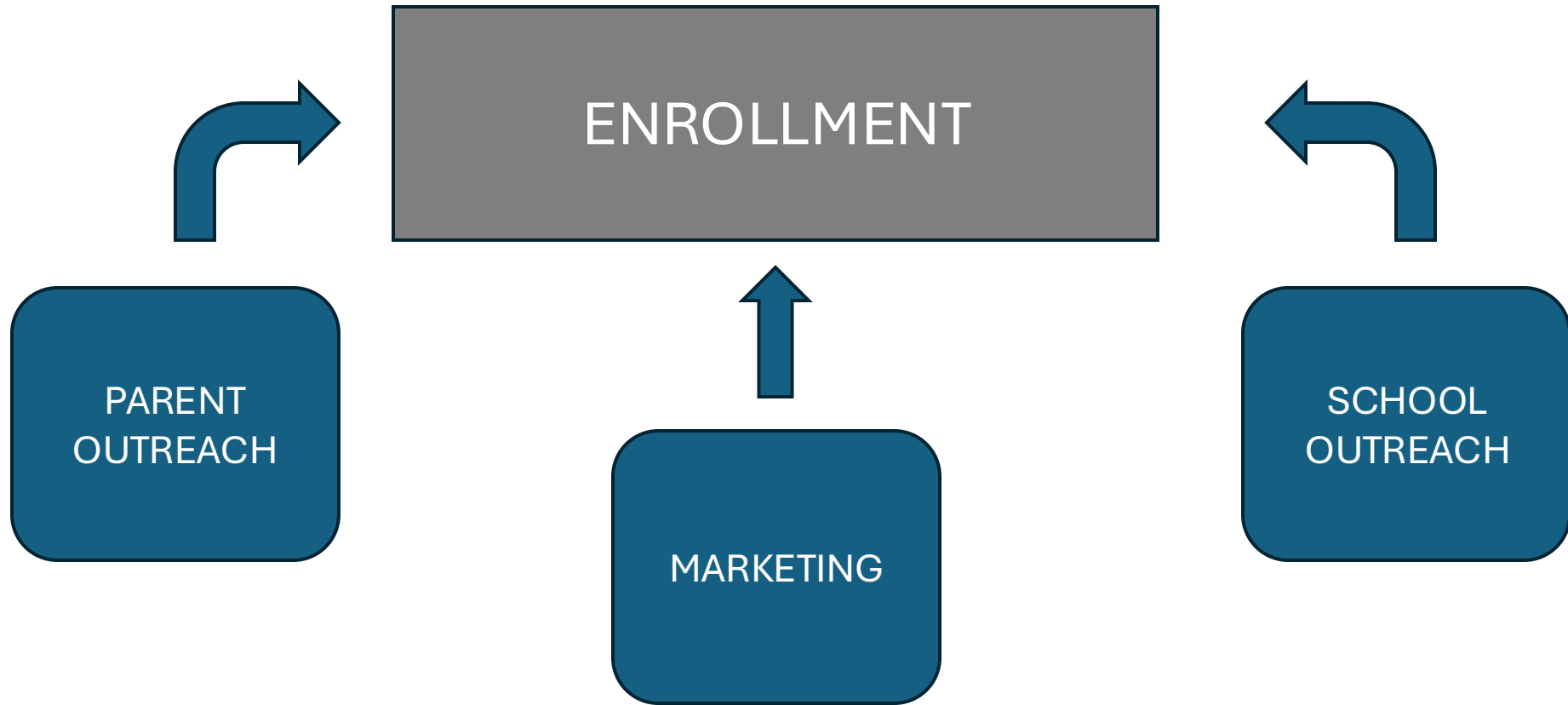


American Federation for Children (AFC)



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Core Implementation Tactics

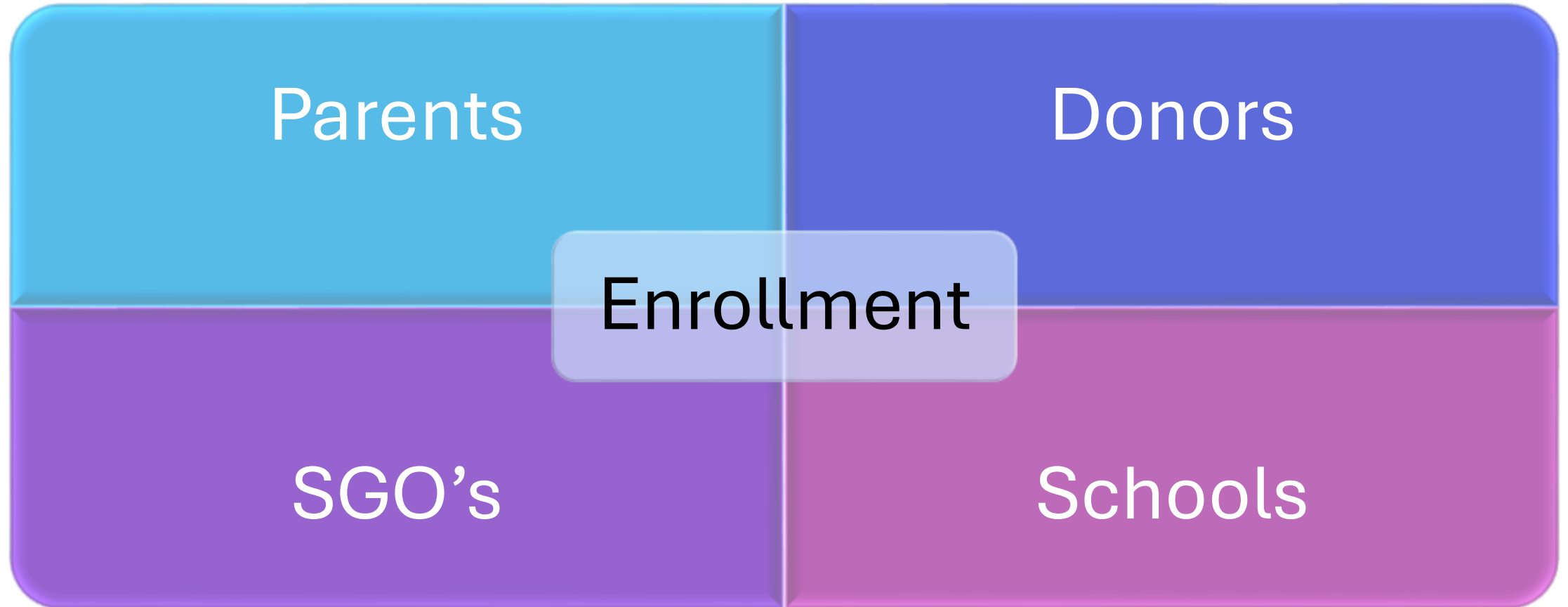


Implementing Scholarship Tax Credit Programs



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Key Groups and Need for Synergy



Education Cycle

School choice program education is like school enrollment. It is ongoing and cyclical.



Early Implementation Goals

EDUCATE
STAKEHOLDERS

CREATE A
CULTURE OF
GIVING



Parent Education

- Parents are the primary educators of their children, but don't assume they have all the information they need to make educated decisions and engage the scholarship and enrollment process.
 - Key questions to answer
 - What is a tax credit scholarship?
 - Who would be eligible?
 - What might scholarship funding look like?



Parent Education



TAX CREDIT SCHOLARSHIPS FOR PRIVATE EDUCATION

HELPING FAMILIES ACCESS PRIVATE EDUCATION THROUGH SCHOLARSHIPS FUNDED BY TAX CREDIT DONATIONS.

What's a Tax Credit Scholarship?

TAX CREDIT SCHOLARSHIPS ALLOW TAXPAYERS TO RECEIVE FULL OR PARTIAL TAX CREDITS WHEN THEY DONATE TO NONPROFITS PROVIDING PRIVATE SCHOOL SCHOLARSHIPS.

SCHOLARSHIP PROGRAM: GEORGIA STUDENT SCHOLARSHIP ORGANIZATION (GASSO).
ELIGIBILITY: OPEN TO STUDENTS ENTERING PRE-K, KINDERGARTEN, 1ST GRADE, OR TRANSFERRING FROM A GEORGIA PUBLIC SCHOOL.

How Does It Work for Families?

- **FIND A SCHOLARSHIP:** VISIT GASSO OR OTHER APPROVED NONPROFITS TO APPLY.
- **ELIGIBLE USES:** TUITION, TEXTBOOKS, AND OTHER PRIVATE SCHOOL EXPENSES.
- **FAMILY INVOLVEMENT:** FAMILIES ARE ENCOURAGED TO DONATE TO THE PROGRAM, BUT IT'S NOT REQUIRED FOR YOUR CHILD TO QUALIFY.

What are the Benefits for Students?

- ✓ ACCESS BETTER EDUCATIONAL OPPORTUNITIES.
- ✓ LOWER OUT-OF-POCKET TUITION COSTS.
- ✓ SCHOLARSHIPS FOR PRIVATE K-12 EDUCATION.



APPLICATIONS OPEN: JANUARY 1ST EACH YEAR!
LEARN MORE AND APPLY AT GEORGIASSO.COM

TO LEARN MORE TEXT HOLLY TEREI AT (678) 508-8989
MOM ON A MISSION

FEDERATIONFORCHILDREN.ORG



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School Education

- How will scholarships awarded to families be funded?
 1. Application timelines/deadlines
 2. Materials needed to apply
 3. Payment dates
- How can our school and community contribute to the creation of a culture of giving to fund scholarships?
 1. Know the rules
 2. Promote the opportunity
 3. Find the financial professionals in your communities and engage/educate them to extend donor ties



Donor Education

- Who can donate?
 - Individual
 - Corporate
- How much can be donated?
- What is the process for donating?
- What is the timeline for donations?
- Answering the always popular, “How do I know this actually works?”

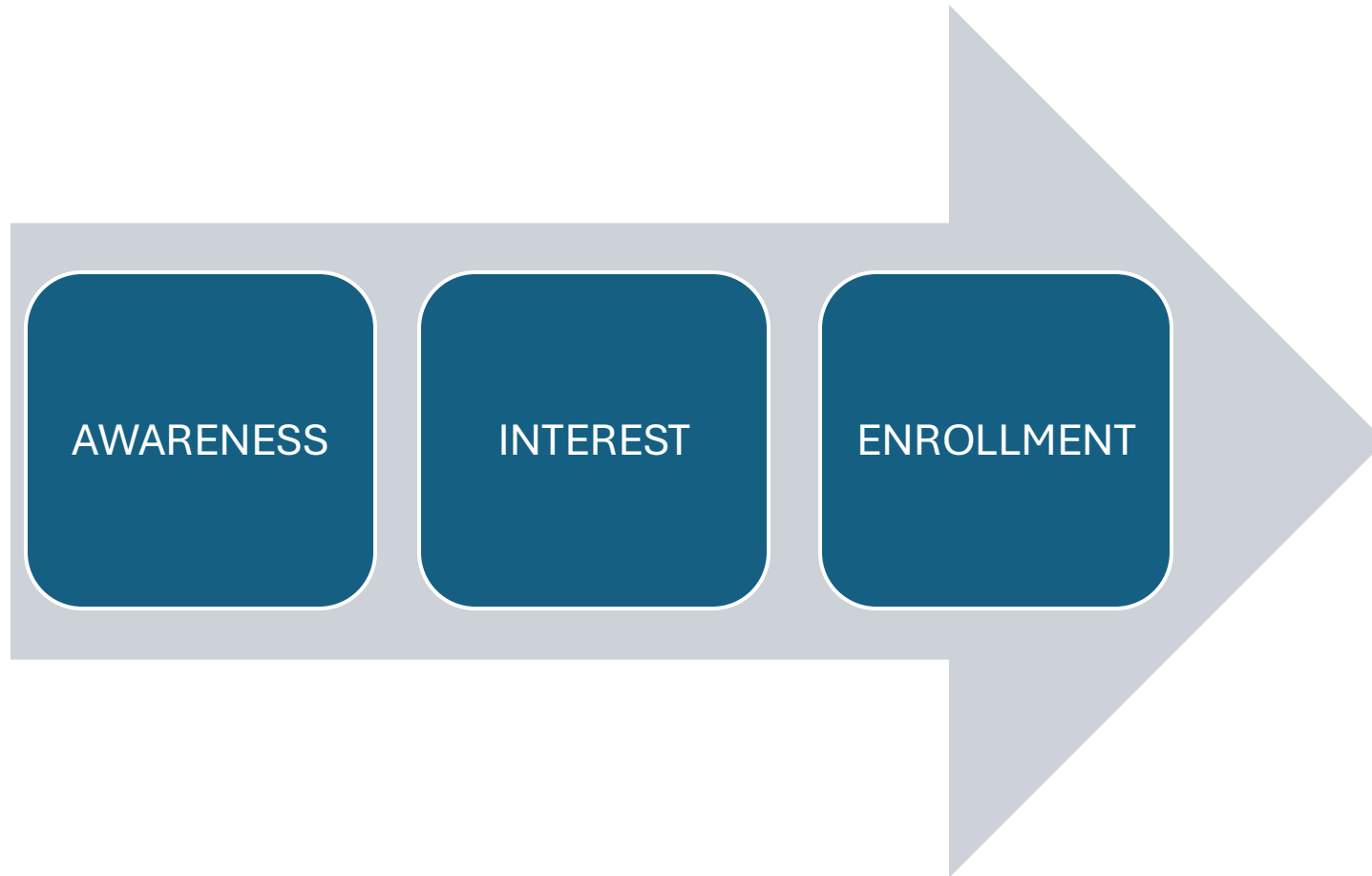


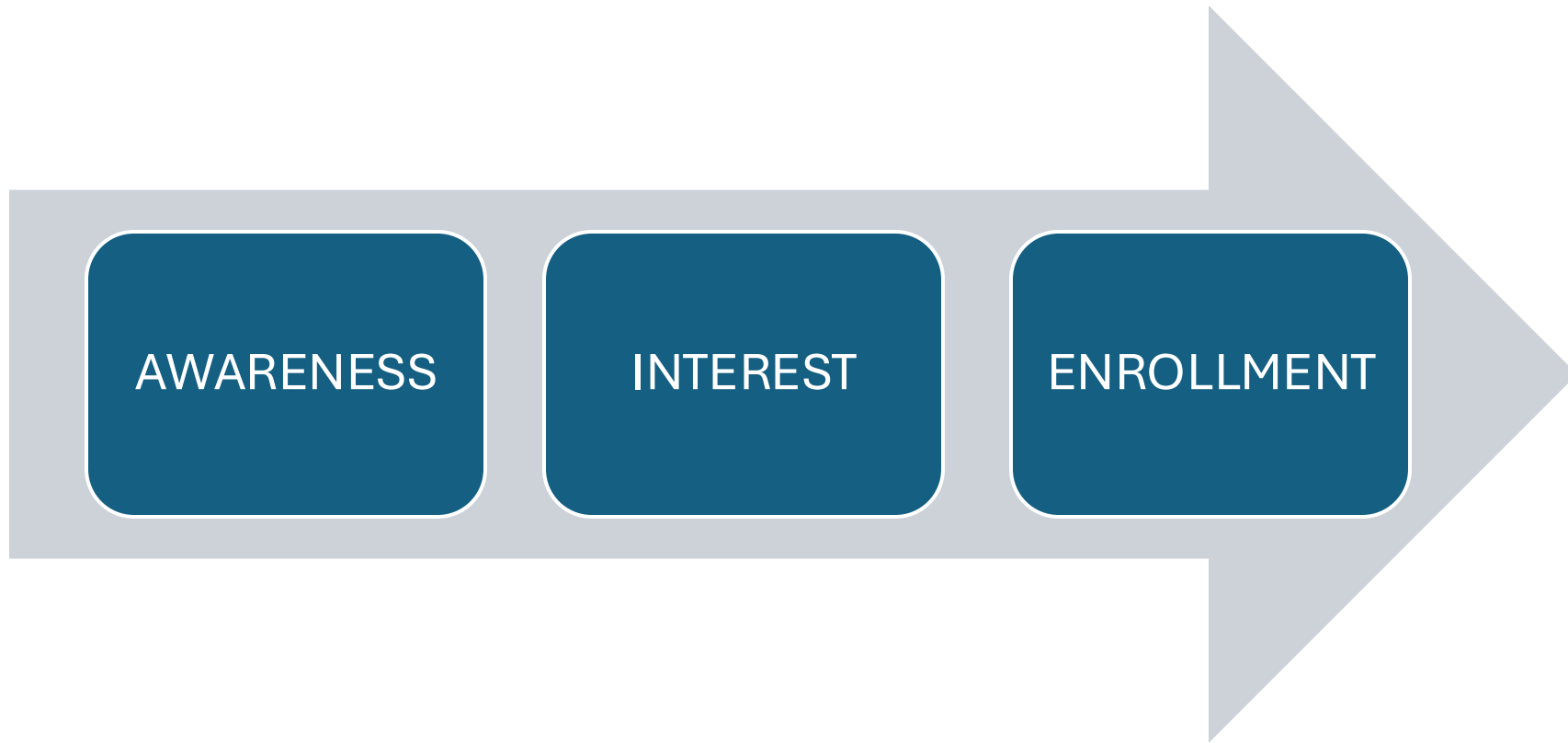
Scholarship Granting Organizations (SGO) Education

- What are the requirements to be a Scholarship Granting Organization?
- What fundraising and distribution requirements must be met to be compliant with the law?
- What donor base do you already have established and how can you widen that net?
- What infrastructure/funding do you have and need to start an SGO?



Executing an Enrollment Campaign





School and SGO Driven



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School Websites



The image shows a screenshot of a school website. At the top left is the school's logo, a circular emblem with a cross and the text 'OUR LADY OF MOUNT CARMEL ROMAN CATHOLIC ELEMENTARY SCHOOL'. To the right of the logo, the school's name 'Our Lady of Mount Carmel' is written in a large, bold, white font, with 'Roman Catholic Elementary School' in a smaller font below it. A dark blue navigation bar contains the following menu items in white, uppercase letters: 'ABOUT', 'ADMISSION', 'ACADEMICS', 'SPIRITUAL LIFE', 'EXTRACURRICULAR', 'PRESCHOOL', 'PARENTS', 'ALUMNI', 'PARISH', and a search icon 'Q'. Below the navigation bar is a large hero image of two young children, a girl and a boy, both wearing red polo shirts with the school's logo on the chest. They are smiling and standing in a school hallway. Overlaid on the bottom left of the hero image is a white left-pointing arrow. In the center of the hero image, the text 'Looking for Empowerment Scholarship (ESA) information?' is written in white. Below this text is a red button with the white text 'LEARN MORE'.

Our Lady of Mount Carmel
Roman Catholic Elementary School

ABOUT ▾ ADMISSION ▾ ACADEMICS ▾ SPIRITUAL LIFE ▾ EXTRACURRICULAR ▾ PRESCHOOL PARENTS ▾ ALUMNI PARISH Q ▾

Looking for Empowerment Scholarship (ESA) information?

LEARN MORE



AMERICAN FEDERATION *for* CHILDREN

School Websites



Our Lady of Mount Carmel
Roman Catholic Elementary School

[ABOUT](#) - [ADMISSION](#) - [ACADEMICS](#) - [SPIRITUAL LIFE](#) - [EXTRACURRICULAR](#) - [PRESCHOOL](#) - [PARENTS](#) - [ALUMNI](#) - [PARISH](#) [Q](#) -

Scholarships and Tuition Tax Credit Organizations

There are multiple outside organizations that can provide financial assistance to help you afford a Catholic education at Our Lady of Mount Carmel Catholic School. (Under each STO name is noted the fund types they award).

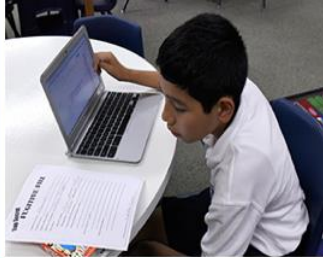
STO (click the name to access website)	Application Opens	Application Closes
CEA/FAIR (Original/Switcher/Corp/DD)	Feb 1, 2025 School Code: 700 School Password: cea700	Apr 15, 2025 (Round 1) - \$29 fee
ESA	Tentatively Early May 2025	Q1 May 1, Q2 Aug 1, Q3 Nov 1, Q4 Feb 1
AAA (Corp/DD)	New and returning families can now apply for AAA's income-based scholarship from April 5 to May 31, 2025	see website
APESF (Original/Switcher/Corp/DD)	Mar 1, 2025	see website
ASCT (Original/Switcher/Corp/DD)	Jan 22, 2025	see website
AZ4Education (Original/Switcher/Corp/DD)	Feb 15, 2025	Apr 1, 2026
AZLF (Corp/DD)	Apr 15, 2025	Jun 18, 2025
Brophy Community Foundation (Corp)	Feb 1, 2025	May 1, 2025 - \$35 fee
IBE (Original/Switcher/Corp/DD)	Feb 3, 2025	see website
School Choice Arizona (Original/Switcher/Corp/DD)	Mar 1, 2025	May 15, 2025
TOPS (Corp)	May 1, 2024	see website



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School Information Sessions

How to Afford Private Education



St. Pius is committed to making attendance in our school attainable and affordable for all parents. In order to learn about eligibility for scholarships and the process for applying. Please join us for an information session in the school library at 5:30 p.m. on Monday, August 3rd.

Topics will include:

- Information regarding scholarships available to reduce tuition costs
- How to work with Student Tuition Organizations that fund scholarships
- Long term planning for financing your child's educational needs
- The St. Pius parent's experience using scholarships to fund tuition needs

Event Overview

- 5:30 p.m. George Zander, St. Pius Principal: Welcome and introduction of school personnel who work with tuition and parent financial needs
- 5:45 p.m. Rita Tejada, St. Pius Director of Finance: Overview of scholarship programs and eligibility factors
- 6:00 p.m. Jim Fields, C.E.O. of Success for Students Student Tuition Organization: How to work with STO's to fund tuition needs
- 6:20 p.m. Suzie McQuade, School Parent: Working with STO's and scholarship legislation, a current parent's perspective.
- 6:30 p.m. Shelly Jones, St. Pius Development Director: Long term planning for funding your child's education.
- 6:45 p.m. General questions

Need More Information?

We invite you to visit the websites of various Student Tuition Organizations through the Department of Revenue at:

<https://azdor.gov/tax-credits/certification-school-tuition-organizations>

We Are Here to Help Our Parents:

If at any time you need additional assistance, please contact Rita Tejada in the St. Pius Business Office. We are happy to help you in any way we can to make your families time in our community enjoyable and rewarding.



Making Your Event A Success

1. Hold affordability events quarterly.
2. Put the events on your school calendar prior to the start of the year.
3. Begin aggressively marketing them three weeks prior to each event
 - a. Include the dates of the events in school newsletter
 - b. Put the dates on all social media accounts
 - c. Send an email blast a week prior to the event reminding parents to RSVP
 - d. Call families that have expressed interest in getting information on your school to personally invite them.
 - e. Create a flyer that can be handed out after Saturday/Sunday Services
 - i. Ask Pastor's to make pulpit announcement to promote the event to parishioners with children
4. Have a survey ready for parents to fill out at the end of the event to get feedback in order to make sessions more effective and popular.
5. Send follow-up thank you notes to those who attended.
6. Take pictures of event presenters speaking to push out on social media with reminders of the date and time of next event.



School Explainer Videos



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SGO Resources for Schools

HOW IT WORKS:

Three Steps to Changing a Life

STEP 1: HOW MUCH CAN I CONTRIBUTE?

If you file FORM AZ140, look at LINE 48 of last year's return to determine the amount you can contribute as a tax credit. If you file FORM 140PY, look at LINE 58.

STEP 2: MAKE YOUR CONTRIBUTION

Choose the General Scholarship Fund, which serves the schools with unmet need, or designate the school(s) of your choice.

- Call: 602-218-6542
- Online: CEAZ.ORG
- Mail: Complete and mail the contribution form

STEP 3: CLAIM YOUR TAX CREDIT USING AZ TAX FORMS 323 AND/OR 348 ON YOUR 2023 AZ TAX FILING

CEA will mail you a tax receipt as proof of payment. Present this to your tax preparer (or use with your personal tax software).

NO QCO CODE NEEDED!



#1 CATHOLIC SCHOOL TUITION ORGANIZATION

What is the private education tax credit?

Arizona law (ARS43-1089) allows a taxpayer to direct all or a portion of their state tax liability to certified School Tuition Organizations (STOs) like Catholic Education Arizona. Your tax credit dollars are used exclusively for tuition scholarships for underserved children.

Did you know that you can DOUBLE the impact of your tax credit contribution at no additional cost to you?

Many employers match tax credit contributions made by their employees and retirees. By simply completing a matching gift form provided by your employer, you may be able to have your contribution matched. To see if your employer participates, visit our Matching Gift Opportunities page on our website.

Can I take multiple tax credits (private education, public school, qualifying charitable, foster care)?

Absolutely! You can participate in multiple tax credit programs up to the extent of your state tax liability. Remember, if you end up contributing more than your tax liability this year, you can carry over the excess for up to 5 tax years.



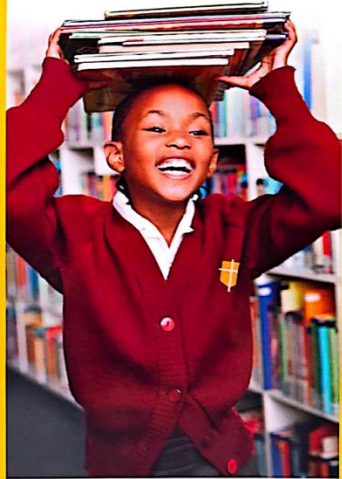
602-218-6542 | WWW.CEAZ.ORG
5353 N. 16th Street, Suite 330 | Phoenix, AZ 85016



Catholic Education Arizona is an IRS 501(c)(3) nonprofit charitable organization and has never accepted gifts designed for individuals. For state tax & school tuition organization status awards, notice to the news, scholarships, and on the basis of donor recommendations. A taxpayer may not claim a tax credit if the taxpayer agrees to any donation with another taxpayer to benefit other taxpayer's own dependent.

INDIVIDUAL TAX CREDITS

Your AZ Tax Liability Can Change Lives!



Catholic Education
ARIZONA

Changing lives one scholarship at a time.



HIGH SCHOOLS

- | | |
|---------------------------------|---------------------------------|
| BOURGADE CATHOLIC | ST. MARY'S CATHOLIC |
| NOTRE DAME PREPARATORY | ST. MICHAEL INDIAN SCHOOL |
| SETON CATHOLIC PREPARATORY | XAVIER COLLEGE PREPARATORY |
| ST. JOHN PAUL II ROMAN CATHOLIC | BOYS HOPE GIRLS HOPE OF ARIZONA |

ELEMENTARY SCHOOLS

- | | |
|---------------------------------|---------------------------|
| ANNUNCIATION | ST. GREGORY |
| BLESSED SACRAMENT | ST. JEROME |
| BOYS HOPE GIRLS HOPE OF ARIZONA | ST. JOAN OF ARC |
| CHRIST THE KING | ST. JOHN BOSCO |
| IMMACULATE CONCEPTION | ST. JOHN VIANNEY |
| MOST HOLY TRINITY | ST. JOHN XXIII |
| OUR LADY OF MOUNT CARMEL | ST. LOUIS THE KING |
| OUR LADY OF THE LAKE | ST. MARY-BASHA |
| OLPH, GLENDALE | ST. MATTHEW |
| OLPH, SCOTTSDALE | ST. MICHAEL INDIAN SCHOOL |
| QUEEN OF PEACE | ST. PETER INDIAN MISSION |
| SACRED HEART | ST. THERESA |
| SAN FRANCISCO DE ASIS | ST. THOMAS AQUINAS |
| SS. SIMON & JUDE | ST. THOMAS THE APOSTLE |
| ST. AGNES | ST. TIMOTHY |
| ST. CATHERINE OF SIENA | ST. VINCENT DE PAUL |
| ST. FRANCIS XAVIER | |

By directing your state tax liability to Catholic Education Arizona, thousands of children will have access to quality education that best meets their needs. Best of all, your tax credit contribution will last a lifetime:

- 99.4% Graduation Rate
- 97% Matriculate to Higher Education, Trade School, or Military Service
- 1000s of Service Hours Provided to the Community

"A Christ-centered, quality education is essential in today's challenging and complex world. Please consider directing a portion of your Arizona taxes to CEA and be a hero in a child's life."

~ Domico Salce
SUPERINTENDENT OF SCHOOLS, DIOCESE OF PHOENIX



Arizona Private Education Tax Credit CONTRIBUTION FORM

CONSIDER ANY AMOUNT UP TO THE TAX YEAR MAX CREDIT BELOW	2023	2024
Single Max Credit	\$1,307	\$1,459
Married Max Credit	\$2,609	\$2,910
Give By	4/15/2024	4/15/2025

HOW DID YOU HEAR ABOUT CEA?

- School
 Parish
 Mail
 Social Media
 Magazine

CONTRIBUTOR

First Name: _____ M.I. _____
Last Name: _____
Spouse Name: _____
Address: _____
City: _____ State: _____ ZIP: _____
Phone: _____
Email: _____
Member(s) of Parish: _____

CONTRIBUTION

General Scholarship Fund for Schools with highest need \$ _____
School 1: _____ \$ _____
School 2: _____ \$ _____
Total: \$ _____

PAYMENT INFORMATION

I am paying by: Check (Make payable to Catholic Education Arizona)
 Visa Mastercard Discover AMEX
Card Number: _____
Expires: ____ / ____ CVV Code _____
Signature: _____

STATE-REQUIRED DISCLOSURE

Have you already made a tax credit gift to another School Tuition Organization (STO) this year?
 No, this is my first contribution to any STO this year.
 YES: I gave \$ _____ for Tax Year 20 _____.
For Today's Contribution:
 Filing Single Married Filing Jointly
Tax Year intended to claim Credits 20 _____.
~

(OR) MONTHLY CONTRIBUTIONS

Would you like to set up monthly contributions for next year's tax credit? Scheduled Pay offers easy, budget friendly monthly or bi-monthly payments. Register for SCHEDULED PAY at CEAZ.ORG or call our office for assistance at 602-218-6542.

Complete and mail this contribution form to:

Catholic Education Arizona
5353 N. 16th Street, Suite 330
Phoenix, AZ 85016



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SGO Resources for Schools



ITC English Animated Video



ITC Spanish Animated Video



SGO Resources for Schools



Turn Your Arizona Individual Tax Liability Into Scholarships for Underserved Students



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Further Down The Implementation Road

- The Importance of Storytelling
 - Students are the best proof of concept
 - Parents are the best drivers of participation
- AFC's Voices for Choice Initiative





AFC

SCHOOL LEADER
FELLOWSHIP

WHAT IS THE SCHOOL LEADER FELLOWSHIP?

- A project of the American Federation for Children to partner with school leaders and provide a pathway to advocate for the establishment, expansion, and defense of school choice scholarships.
- An educational and professional development opportunity to learn how educators can impact educational policy in their home state to benefit their school.

QUESTIONS?



AMERICAN FEDERATION *for* CHILDREN

Contact Information

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Phone: 602-501-7002

AFC Website: www.federationforchildren.org