

Financial Management for the Future

What if... your budget met your needs?

You're an educator, not a financial analyst, but every teacher you hire and every book you buy affects the financial future of your school. Does your budget work for you?

Financial management in a Catholic school is more than paying the bills, and budgeting is more than cutting costs. A budget is a reflection of an organization's values, and it's an investment plan for the future. That's right - a complete financial analysis isn't just a list of cost cuts. In fact, it may even include recommendations for strategic investment in certain key areas. It starts with a detailed examination of key revenue streams such as tuition and enrollment, fundraising for operations, investment earnings and others. It looks at major cost drivers, including salaries/benefits, administration/instruction expenses, development costs and plant/capital expense. And it measures the benchmarks that are unique and important in a school.

SDG Advisors works with Catholic K-12 schools to analyze their finances in a practical way that makes sense. Our analysis examines all of your resources and how you allocate those resources. We'll give you the financial information you need to make day to day decisions, and we'll make recommendations to guide you in investing in your school's future.

A budget is a reflection of a school's values. Let's build a budget that supports what matters to you.

Planning • Resource Development • Governance • Marketing • Finances
Your mission is our mission. We should meet.



Stacey Picard
Partner & Co-founder



Sr. Ritamary Welsh, OSU
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