

# Questionnaire: FY2020/2021 STO Activities for Lutheran Education Foundation, Inc.

**Instructions:**

Answers to the questionnaire below will affect the other sheets in this workbook, helping you identify what information needs to be provided. Please read carefully and provide a 'Yes' or 'No' response to the questions below, then proceed to the following pages. **You will only be required to report information for 'Yes' answers. Wherever a 'Yes' response is provided, the specific annual report part that must be completed will appear under the 'Instructions' pane to the right of the question response.**

## Individual Programs

**\*Indicates a required field.**

Q1	<b>Does the STO accept student recommendations? (Individual programs only)</b>	Yes/No <b>No</b>	
<b>Original</b>		Yes/No	<b>Instructions</b> <span style="float: right;"><b>Shortcuts</b></span>
Q2	Did the STO receive any Original donations in FY21?	<b>Yes</b>	Complete Original Donations section on Page 2-Summary of ALL Programs. <a href="#">Link</a>
Q3	Did the STO award any Original scholarships in FY21?	<b>Yes</b>	Complete Original Scholarships section on Page 2-Summary of ALL Programs <a href="#">Link</a> *Also complete Scholarships Awarded by School section on Page 3-Original Scholarships. <a href="#">Link</a>
Q4	Did the STO allocate any future Original scholarships in FY21?	<b>No</b>	
Q5	Did the STO receive any prior year Original scholarship refunds in FY21?	<b>No</b>	
Q6	Did the STO transfer any Original contribution monies to another STO in FY21?	<b>No</b>	
Q7	Did the STO receive any Original contribution monies from another STO in FY21?	<b>No</b>	
<b>Switcher</b>		Yes/No	
Q8	Did the STO receive any Switcher donations in FY21?	<b>Yes</b>	Complete Switcher Donations section on Page 2-Summary of ALL Programs. <a href="#">Link</a>
Q9	Did the STO award any Switcher scholarships in FY21?	<b>Yes</b>	Complete Switcher Scholarships section on Page 2-Summary of ALL Programs <a href="#">Link</a> *Also complete Scholarships Awarded by School section on Page 4-Switcher Scholarships. <a href="#">Link</a>
Q10	Did the STO allocate any future Switcher scholarships in FY21?	<b>No</b>	
Q11	Did the STO receive any prior year Switcher scholarship refunds in FY21?	<b>No</b>	
Q12	Did the STO transfer any Switcher contribution monies to another STO in FY21?	<b>No</b>	
Q13	Did the STO receive any Switcher contribution monies from another STO in FY21?	<b>No</b>	

## Corporate Programs

**\*Indicates a required field.**

<b>Low-Income</b>		Yes/No	<b>Instructions</b> <span style="float: right;"><b>Shortcuts</b></span>
Q14	Did the STO receive any Low-Income donations in FY21?	<b>No</b>	
Q15	Did the STO award any Low-Income scholarships in FY21?	<b>No</b>	
Q16	Did the STO allocate any future Low-Income scholarships in FY21?	<b>No</b>	
Q17	Did the STO receive any prior year Low-Income scholarship refunds in FY21?	<b>No</b>	
Q18	Did the STO transfer any Low-Income contribution monies to another STO in FY21?	<b>No</b>	
Q19	Did the STO receive any Low-Income contribution monies from another STO in FY21?	<b>No</b>	
<b>Disabled/Displaced</b>		Yes/No	
Q20	Did the STO receive any D/D donations in FY21?	<b>No</b>	

Q21 Did the STO award any D/D scholarships in FY21?

Q22 Did the STO allocate any future D/D scholarships in FY21?

Q23 Did the STO receive any prior year D/D scholarship refunds in FY21?

Q24 Did the STO transfer any D/D contribution monies to another STO in FY21?

Q25 Did the STO receive any D/D contribution monies from another STO in FY21?

## Individual Programs

Original		
<u>Donations</u>		
Number of Donors (July 1 - December 31)		66
Number of Donors (January 1 - June 30)		30
<b>Total</b>		<b>96</b>
Amount of cash contributions received (July 1 - December 31)	\$45,888.00	
Amount of cash contributions received (January 1 - June 30)	\$23,276.00	
<b>Total</b>	<b>\$69,164.00</b>	
<u>Scholarships</u>		
Net number of students receiving scholarships in fiscal year (July 1 - June 30)		23
Net \$ amount of scholarships paid in fiscal year (July 1 - June 30)	\$43,089.00	
\$ Amount of scholarships paid to students with family income. . .		
... up to 185% of poverty level	\$24,489.00	56.83%
... from 185% of poverty level to 342.25% of poverty level	\$17,068.00	39.61%
		<b>96.44%</b>

Switcher		
<u>Donations</u>		
Number of Donors (July 1 - December 31)		38
Number of Donors (January 1 - June 30)		17
<b>Total</b>		<b>55</b>
Amount of cash contributions received (July 1 - December 31)	\$28,698.00	
Amount of cash contributions received (January 1 - June 30)	\$14,428.00	
<b>Total</b>	<b>\$43,126.00</b>	
<u>Scholarships</u>		
Net number of students receiving scholarships in fiscal year (July 1 - June 30)		21
Net \$ amount of scholarships paid in fiscal year (July 1 - June 30)	\$37,691.00	
\$ Amount of scholarships paid to students with family income. . .		
... up to 185% of poverty level	\$21,639.00	57.41%
... from 185% of poverty level to 342.25% of poverty level	\$14,954.00	39.68%
		<b>97.09%</b>

## Corporate Programs

Low-Income		
<u>Donations</u>		
Number of Donors (July 1 - December 31)		

Number of Donors (January 1 - June 30)		
<b>Total</b>		<b>N/A</b>
Amount of cash contributions received (July 1 - December 31)		
Amount of cash contributions received (January 1 - June 30)		
<b>Total</b>		<b>N/A</b>
<u>Scholarships</u>		
Net number of students receiving scholarships in fiscal year (July 1 - June 30)		
Net \$ amount of scholarships paid in fiscal year (July 1 - June 30)		
\$ Amount of scholarships paid to students with family income. . .		
... up to 185% of poverty level		N/A
... from 185% of poverty level to 342.25% of poverty level		N/A
		N/A

<b>Disabled/Displaced</b>		
<u>Donations</u>		
Number of Donors (July 1 - December 31)		
Number of Donors (January 1 - June 30)		
<b>Total</b>		<b>N/A</b>
Amount of cash contributions received (July 1 - December 31)		
Amount of cash contributions received (January 1 - June 30)		
<b>Total</b>		<b>N/A</b>
<u>Scholarships</u>		
Net number of students receiving scholarships in fiscal year (July 1 - June 30)		
Net \$ amount of scholarships paid in fiscal year (July 1 - June 30)		
\$ Amount of scholarships paid to students with family income. . .		
... up to 185% of poverty level		N/A
... from 185% of poverty level to 342.25% of poverty level		N/A
		N/A

<b>Page 2 Totals:</b>	<b>23</b>	<b>\$43,089.00</b>
This Page Totals:	23	\$43,089.00

**Original Scholarships by School**

			July 1 - June 30	
School Name	School Address	City	Net # of Scholarships	Net \$ Amount of Scholarships
Atonement Lutheran School	4001 West Beardsley Road	Glendale	2	\$5,000.00
Christ Lutheran School	3901 East Indian School Road	Phoenix	4	\$2,400.00
North Valley Christian Academy	33655 North 27th Dr, Bldg A	Phoenix	2	\$5,381.00
Dream City School	21000 North 75th Avenue	Glendale	2	\$4,000.00
Trinity Lutheran School	830 East Plaza Circle	Litchfield Park	4	\$6,834.00
Valley Lutheran High School	5199 North 7th Avenue	Phoenix	5	\$10,834.00
Yuma Lutheran School	2555 South Engler Avenue	Yuma	4	\$8,640.00

		Calculated Totals	0	\$0.00
<b>Future Allocated Original Scholarships by School</b>			July 1 - June 30	
School Name	School Address	City	Net # of Scholarships	Net \$ Amount of Scholarships

		Calculated Totals	0	\$0.00
<b>Prior Year Refunded Original Scholarships by School (scholarships awarded in prior fiscal year but refunded in this fiscal year)</b>			July 1 - June 30	
School Name	School Address	City	Net # of Scholarships	Net \$ Amount of Scholarships

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			<b>Page 2 Totals:</b>	<b>21</b>	<b>\$37,691.00</b>
			This Page Totals:	21	\$37,691.00
<b>Switcher Scholarships by School</b>			July 1 - June 30		
School Name	School Address	City	Net # of Scholarships	Net \$ Amount of Scholarships	
Atonement Lutheran School	4001 West Beardsley Road	Glendale	3	\$4,854.00	
North Valley Christian Academy	33655 North 27th Dr, Bldg A	Phoenix	5	\$8,090.00	
Trinity Lutheran School	830 East Plaza Circle	Litchfield Park	2	\$3,236.00	
Yuma Lutheran School	2555 South Engler Avenue	Yuma	11	\$21,511.00	



Skip this section! (You answered 'No' in the Questionnaire)

Future Allocated Switcher Scholarships by School		Calculated Totals	0	\$0.00
		July 1 - June 30		
School Name	School Address	City	Net # of Scholarships	Net \$ Amount of Scholarships

Skip this section! (You answered 'No' in the Questionnaire)

Prior Year Refunded Switcher Scholarships by School (scholarships awarded in prior fiscal year but refunded in this fiscal year)		Calculated Totals	0	\$0.00
		July 1 - June 30		
School Name	School Address	City	Net # of Scholarships	Net \$ Amount of Scholarships

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		<b>Page 2 Totals:</b>	<b>0</b>	<b>\$0.00</b>
		This Page Totals:	0	\$0.00
July 1 - June 30				
<b>LI Scholarships by School</b>				
School Name	School Address	City	Net # of Scholarships	Net \$ Amount of Scholarships

Skip this section! (You answered 'No' in the Questionnaire)

		Calculated Totals	0	\$0.00
<b>Future Allocated LI Scholarships by School</b>		July 1 - June 30		
School Name	School Address	City	Net # of Scholarships	Net \$ Amount of Scholarships

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**Skip this section! (You answered 'No' in the Questionnaire)**

		Calculated Totals	0	\$0.00
<b>Prior Year Refunded LI Scholarships by School (scholarships awarded in prior fiscal year but refunded in this fiscal year)</b>		July 1 - June 30		
School Name	School Address	City	Net # of Scholarships	Net \$ Amount of Scholarships

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		<b>Page 2 Totals:</b>	<b>0</b>	<b>\$0.00</b>
		This Page Totals:	0	\$0.00
July 1 - June 30				
<b>DD Scholarships by School</b>				
School Name	School Address	City	Net # of Scholarships	Net \$ Amount of Scholarships

Skip this section! (You answered 'No' in the Questionnaire)

		Calculated Totals	0	\$0.00
<b>Future Allocated DD Scholarships by School</b>		July 1 - June 30		
School Name	School Address	City	Net # of Scholarships	Net \$ Amount of Scholarships

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**Skip this section! (You answered 'No' in the Questionnaire)**

		Calculated Totals	0	\$0.00
<b>Prior Year Refunded DD Scholarships by School (scholarships awarded in prior fiscal year but refunded in this fiscal year)</b>		July 1 - June 30		
School Name	School Address	City	Net # of Scholarships	Net \$ Amount of Scholarships



Expecting transfer information (based on Questionnaire) for...

Original	No
Switcher	No
Low Income	No
Disabled/Displaced	No

**Good news! Based on responses in the Questionnaire, no information needs to be provided on this page. Please continue to the next page.**

**Instructions**

- 1 Under the 'Program' field, enter O for Original, S for Switcher, L for Low Income, or D for Disabled/Displaced
- 2 For 'Transfer Amount' field, enter the dollar amount transferred for the program
- 3 For the 'Sent or Received' field, either enter 'Sent' the transfer was outgoing to a different STO or 'Received' if the transfer was incoming from another STO
- 4 Enter the name of the other STO in the 'Name of other STO' field
- 5 Enter a brief note for the reason of the transfer in the 'Reason for Transfer' field

Program (O, S, L, D)	Transfer Amount (\$)	Sent or Received	Name of other STO	Reason for Transfer
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