



## Atidenu, GFA, and Generations Application

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Atidenu and GFA Cohort 3, Generations National Cohort 3

Dear School Leadership Team:

Congratulations! You have taken the first step toward strengthening your school's long-term financial sustainability.

Upon completion of this application, you will be required to submit a \$1,000 deposit. This deposit will be credited towards your total program fee. Our preferred method of payment is by credit card. If that is not an option, you may select to be invoiced and pay by check. The deposit is fully refundable if your school does not enroll in the program and notifies Prizmah by June 10, 2018.

Within two-to-three weeks of receiving this completed online application, a Prizmah representative will contact your designated liaison to schedule a video interview with your team.

Prior to acceptance, your school will be required to pass a Board resolution signifying your commitment to making participation in this program one of your school's top priorities. You can use language similar to the suggestion below and email it to Shelly Sadon at [Shellys@prizmah.org](mailto:Shellys@prizmah.org). Be sure to include the following subject line: "[Your School's Name Here]: School Board resolution." Board resolution language:

*Resolved: The Board of [\_\_\_\_] School hereby commits to making our participation in Prizmah's [name of program] one of our school's top three priorities for the duration of the program.*

We look forward to receiving your application. If you have any questions or concerns, please do not hesitate to reach out.

Warmly,  
Prizmah's Financial Vitality Team

For questions about Atidenu, contact: Elana Alfred at [elanaa@prizmah.org](mailto:elanaa@prizmah.org)

For questions about GFA, contact: Traci Stratford, [tracis@prizmah.org](mailto:tracis@prizmah.org)

For questions about Generations, contact: Helen London, [helenl@prizmah.org](mailto:helenl@prizmah.org)

**All questions with an asterick are required questions.**

### **Contact Information**

First Name\*

Last Name\*

Email\*

General Information\*

School/Organization\*

Primary application contact person\*

*This will be Prizmah's point person throughout the application process with all questions, scheduling, etc.*

Title/Role\*

Address\*

City\*

State\*

Zip/postal code\*

Country\*

Phone number\*

Email\*

### **General Information**

1. What grades does your school serve?\*
2. Do you have a Board-approved strategic plan focused on accomplishing those strategic priorities?\*
3. What are your school's top three strategic priorities over the next three years?\*
4. Will this program align with your school's top three strategic priorities?\*
5. Is your school sponsored or supported by another organization, such as a synagogue?\*
6. If yes, what is the governance relationship between the sponsoring institution Board of Directors, the school Board of Directors (if any), and the Head of School?
7. Is your school accredited by any local or national organizations?\*
8. If yes, please list which organizations.

### **School Organization and Personnel**

Please provide the name and email for the following 2017-2018 school year, and years of service at your current school:

1. Head of School\*
2. Institutional Advancement
3. Development Director
4. Director of Admission/Enrollment Management
5. Marketing/Communications Director
6. CFO/Business Manager

### **Head of School Information**

1. What is the length of the Head of School's remaining contractual commitment to the school in years? months?
2. What percentage of the Head of School's time is spent on these activities:\*

  - a. Educational matters/general oversight/staff management
  - b. What percentage of the Head of School's time is spent on Planning and executing a Capital Campaign
  - c. What percentage of the Head of School's time is spent on Planning and executing the Annual Campaign
  - d. What percentage of the Head of School's time is spent on Planning and executing

- endowment development
- e. What percentage of the Head of School's time is spent on Donor development (identification, cultivation, solicitation, and stewardship) of major donor
- f. relationships and gifts
- g. What percentage of the Head of School's time is spent on New student recruitment
- h. What percentage of the Head of School's time is spent on Current student retention
- i. What percentage of the Head of School's time is spent on Strategic planning and implementation
- j. What percentage of the Head of School's time is spent on Governance
- k. What percentage of the Head of School's time is spent on Other
- l. If Other is selected, please specific here.

### **Lay Leadership Engagement**

1. Please indicate if you have lay leaders filling the following roles for the 2018-2019
2. school year\* (*Choices are: Yes or No*)
  - a. Board Chair (or equivalent)
  - b. Marketing Committee Chair
  - c. Admission/Recruitment Committee Chair
  - d. Development Chair
  - e. Endowment Chair
3. How many consecutive years of service do the following school 2017-2018 lay leaders have remaining in their current roles?\* (*Choices are: 0-1 Years, 1-3 Years, 3-5 Years, 5 Years +, NA*)
  - a. Board Chair
  - b. Marketing Committee Chair
  - c. Recruitment Committee Chair
  - d. Development Chair
  - e. Endowment Chair
4. What is the term limit of the current Board Chair?\* (*Choices are: 1 year, 2 years, 3 years, None, Other*)
5. If you chose other, what is the term limit of the current Board Chair?
6. How many more years from today is your Board Chair serving?\*
7. What milestones of accomplishment demonstrate the Board Chair's contribution in strengthening the school during their term?\*

### **Enrollment Data\***

1. ECE Total 2016-2017
2. Kindergarten 2016-2017
3. First grade 2016-2017
4. Second grade 2016-2017
5. Third grade 2016-2017
6. Fourth grade 2016-2017
7. Fifth grade 2016-2017
8. Sixth grade 2016-2017
9. Seventh grade 2016-2017
10. Eighth grade 2016-2017
11. Ninth grade 2016-2017
12. Tenth grade 2016-2017
13. Eleventh grade 2016-2017
14. Twelfth grade 2016-2017
15. Total Enrollment 2016-2017
16. ECE Total 2017-2018
17. Kindergarten 2017-2018

18. First grade 2017-2018
19. Second grade 2017-2018
20. Third grade 2017-2018
21. Fourth grade 2017-2018
22. Fifth grade 2017-2018
23. Sixth grade 2017-2018
24. Seventh grade 2017-2018
25. Eighth grade 2017-2018
26. Ninth grade 2017-2018
27. Tenth grade 2017-2018
28. Eleventh grade 2017-2018
29. Twelfth grade 2017-2018
30. Total Enrollment 2017-2018

### **Fundraising and Finance\***

1. Annual Campaign fundraising total: 2015-2016
2. Capital Campaign fundraising total: 2015-2016
3. Annual Campaign fundraising total: 2016-2017
4. Capital Campaign fundraising total: 2016-2017
5. Annual Campaign fundraising total: 2017-2018 (goal)
6. Annual Campaign fundraising total: 2017-2018 (to date)
7. Capital Campaign fundraising total: 2017-2018 (to date)

### **Budgeting Questions**

1. What is your school's total operating budget 2016-2017?
2. What is your school's total operating budget 2017-2018?
3. What is your Preschool (average) tuition for 2017-2018?
4. What is your Elementary tuition for 2017-2018?
5. What is your Middle school tuition for 2017-2018?
6. What is your High school tuition for 2017-2018?
7. What percentage of families received some financial aid 2017-2018?
8. What percentage of families received a professional discount 2017-2018?

What program is your school applying for?\* Atidenu – GFA - Generations

### **ATIDENU QUESTIONS**

#### **Admission Personnel**

1. Does your school have one or more Admission/Enrollment Management professionals?\*
2. Please explain the structure of your Admission department and the roles and responsibilities of each individual. If your school does not have an Admission/Enrollment Management professional, what is the name and title of the most senior person (either lay or professional) who is accountable for Admissions?\*
3. Is your Admission Professional full-time or part-time?\*

#### **Admission Activity**

1. Does the admission professional, or person responsible for recruitment and retention efforts, report regularly to the board of directors?\*
2. Does your school have an active and organized Parent Ambassador program?\*
3. Please provide links to your schools' web page and blog posts.\*
4. Do you use admission tracking software/database?\*

5. If yes, what system do you use? Why?
6. If no, how do you track admission data (perspectives, inquiries, visits, tours applications, enrolled?)\*

### **Admission Planning**

1. Does your school have a written recruitment and retention or admission plan?\*
2. Does your school have a written marketing/communications plan?\*
3. Does your school have a comprehensive curriculum plan (scope and sequence)?\*

### **Attrition Data\***

1. Preschool 2016-2017
2. Elementary 2016-2017
3. Middle School 2016-2017
4. High School 2016-2017
5. Total Attrited Students 2016-2017
6. Total Students Enrolled 2016-2017
7. Total Graduates 2016-2017
8. Total Out 2016-2017
9. Attrition Rate (%) 2016-2017
10. Preschool 2017-2018
11. Elementary 2017-2018
12. Middle School 2017-2018
13. High School 2017-2018
14. Total Students Enrolled 2017-2018
15. Total Attrited Students 2017-2018
16. Total Graduates 2017-2018
17. Total Out 2017-2018
18. Attrition Rate (%) 2017-2018

### **Requested Documents/Web Links**

1. Board Approved Strategic Plan
2. Written Recruitment and Retention/Admission Plan
3. School Marketing/Communication Plan
4. 2016-2017 Admission Data
5. Curriculum Plan

### **GFA or GENERATIONS**

1. What is your K-12 total enrollment (as of today)?\*
2. Please explain the structure of your development department. (Including staff roles/responsibilities)\*
3. If your school does not have a Development professional, what is the name and title of the most senior person (either lay or professional) who is accountable for development?
4. What percentage of full time equivalency does this person work?
5. Does your school have a written development plan?\*
6. Do you use donor tracking software/database? If so, which systems do you use? If no- how do you track donor and donation related data?\*

### **Development Information**

1. Number of Annual Campaign Donors (solicited and unsolicited) to date:\*
2. Does your school have an endowment?\*
3. FY18 endowment fund valuation?\*
4. What is the estimated value of any legacy gifts pledged to your school?\*

5. Is your school currently engaged in a capital campaign?\*
6. Will you begin a capital campaign in the next 3 years?\*

### **Governance Practices**

Do you engage in the following governance practices?\* (*Choices are: Yes, No, Not Applicable*)

1. The school has an up-to-date strategic plan with measurable goals and strategies to achieve them
2. The school has a long-term financial plan indicating how the school will fund its operations and sustain itself
3. The board has chartered committees and given them specific responsibilities in executing the school's strategic and long-range financial plans
4. Board committees have developed work plans that guide their activities and deliverables related to achieving the school's long-term goals
5. The school has a succession plan for your Head of School
6. The school has a succession plan for board leadership
7. The school's board meetings are primarily focused on the execution of the strategic plan (not on day-to-day operations)
8. Board members regularly identify and cultivate major gift prospects.
9. The school has a development committee that sets fundraising policy and provides leadership in support of the various campaigns of the school
10. The board works with the school administration to ensure clear, documented distinctions between the appropriate roles of the board and administration.
11. The board establishes written annual goals for the head of school that make it clear what s/he needs to do to succeed
12. The board has a committee that supports the head of school with confidential advice and communications support among key constituencies
13. The board periodically reviews its by-laws to ensure they are up-to-date

### **Final Questions (All Programs)**

1. How do you hope to benefit from participating in Prizmah's program? What are your specific goals?\*
2. Please feel free to share any additional information here that you would like us to know.

### **Authorization\***

I attest that both the Head of School (or equivalent) and the Board Chair (or equivalent) have read this completed application and endorse the answers given.