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HaYidion
הידיעון
WINTER 2014 • חורף תשע"ד

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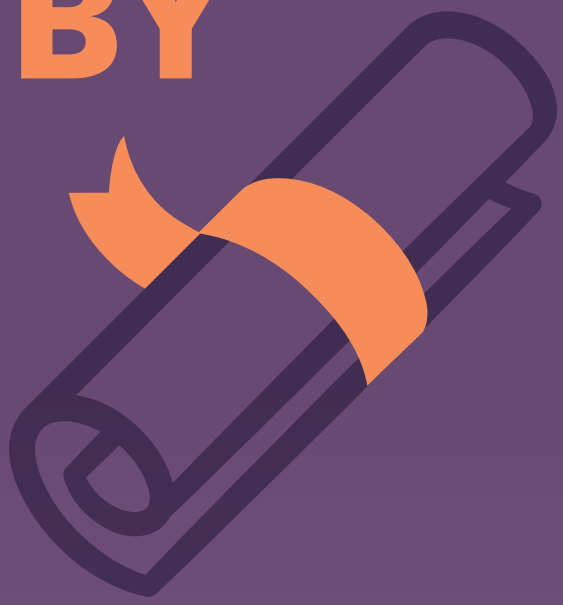

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RAVSAK would like to thank our associate members:

From the Editor

■ by **Barbara Davis**

וְהַכֶּסֶף יַעֲנֶה אֶת הַכֹּל

"Money answers all things." (Kohelet 10.19)

Perhaps it is fitting that this Chanukkah issue of *HaYidion* is about *gelt*. In *The Biblical and Historical Background of Jewish Customs and Ceremonies*, Abraham Bloch wrote that "the tradition of giving money (Chanukkah gelt) to children is of long standing. The custom had its origin in the 17th-century practice of Polish Jewry to give money to their small children for distribution to their teachers. In time, as children demanded their due, money was also given to children to keep for themselves."

Oscar Wilde wrote, "Ordinary riches can be stolen; real riches cannot. In your soul are infinitely precious things that cannot be taken from you." While those of us working in the field of Jewish day school education would far prefer to occupy ourselves in the pursuit of "infinitely precious" matters of the soul, the reality is that many if not most of us spend an inordinate amount of time pursuing the gelt that keep our doors open and our lights on.

The pursuit of money has been defined as the root of all evil, yet money has always been recognized in Jewish tradition as an essential component of our very existence as individuals and institutions: "If we have no money, no one respects us" (Esther Rabbah 2.4). "All the organs depend on the heart, and the heart depends on the purse" (Johanan ben Nappaha, Jerusalem Talmud: Terumot 8.4), and going even further, "Money legitimates a bastard" (Joshua ben Levi, Talmud: Kiddushin 71a).

Yet having recognized the need for and existential importance of money, most of us still struggle with how to acquire it—in sufficient quantities and in a sustainable manner so that we don't have to constantly worry about it. Tuition income, like ticket sales for cultural institutions, only covers a portion of what is needed to keep schools running. Alternative sources of income (afterschool programs, preschools, summer camps) can provide some additional funds, but for most schools philanthropy is the key to continued survival.

We live in interesting times with regard to philanthropy. The National Center for Charitable Statistics reports that giving by individuals makes up the vast majority of contributions received by nonprofit organizations, amounting to $228.93 billion in 2012. The Center further notes that those at either the high end or low end of the income distribution tend to give a higher percentage of their income as contributions than those in the middle, and that households that contribute to religious organizations tend to give more, both in dollars per donation and in percentage of income donated. Households that give to religious organizations donate about twice as much as households that give to secular organizations.

What do these facts mean to those of us in search of philanthropic or other financial support for our schools? The authors of the articles in this issue point out several significant trends and methodologies that can be helpful to schools, including information about tuition charges, working in collaborative relationships, accessing federal funds without encountering separation of church and state issues, and determining the value proposition of our schools.

Money has always been recognized in Jewish tradition as an essential component of our very existence as individuals and institutions: "If we have no money, no one respects us" (Esther Rabbah 2.4).

We believe that you will find this issue fascinating and recommend that you not put off reading it. The last few months of the year make up what is commonly called the "Giving Season" for the nonprofit community and between a quarter and a half of all donations are given between October and December. We hope that you find some enlightening ideas in these pages that will make your Chanukkah brighter and more gelt-ful than ever! ■

Dr. Barbara Davis is the secretary of RAVSAK's Board of Directors, executive editor of HaYidion *and principal emerita at the Syracuse Hebrew Day School in Dewitt, New York. bdavis74@twcyn.rr.com*

FROM THE BOARD

Minding Your (Money) Manners

■ By **Lesley Zafran**

My husband is an obstetrician/gynecologist and one of the things he says he has learned is that the most intimate topic of conversation between doctor and patient is not that three letter word you would expect, but in fact *money*...

I was always taught that money, the topic of this issue of *HaYidion*, is something not discussed in polite company. And yet, I find myself rebelling against this etiquette now as I realize that when talking about money is synonymous with fundraising for what I believe in—organizations like RAVSAK—then I must stand up and (forgive the pun) be counted.

Fundraising remains the fuel that powers the engines of schools and nonprofits. Like other mission-driven organizations, RAVSAK is deeply committed to the constituencies we serve, and our return is measured not in dollars but in the students who make connections between Jewish texts and their own lives; the heads of schools who transition to better leadership as a result of good mentoring; and the boards who govern their schools with greater insight and commitment to the Jewish value proposition.

Jewish community day schools are offer a lifetime guarantee of greater Jewish involvement and a stronger Jewish future for our people. I want this to be the measure of "the best."

But those priceless returns still require investments—investments of time, of human capital, and yes, of money.

Over this past year, RAVSAK has published four extraordinary issues of *HaYidion*. Each issue has shared new perspectives on important topics and blended scholarly and academic insights with practical applications as they happen in the day schools. *HaYidion* ensures that our day schools are ahead of the curve when it comes to new trends in learning, teaching, financial sustainability, technology and engagement of our students, to name just a few of the issues it has covered. The day school world is so much the richer for the incredible contributions to *HaYidion* that we receive from many of you.

Recently someone in development told me about the "Neiman Marcus Effect," which describes how consumers believe that if they buy something from (a place like) Neiman Marcus it will be superior to a similar product purchased elsewhere because Neiman's has a reputation for providing goods that are "the best."

I'd like to apply this approach to fundraising, making sure that there is a complete understanding that our Jewish community day schools, and the network that supports them—our extraordinary RAVSAK—are nothing less than the finest organizations, offering a lifetime guarantee of greater Jewish involvement and a stronger Jewish future for our people. I want *this* to be the measure of "the best."

I would like to invite you to make your own investment in RAVSAK: in appreciation for the value that *HaYidion* brings, in recognition of the mentoring that RAVSAK has provided, in honor of your professional leadership or just because you understand how much RAVSAK contributes to the day school field. We've included a donation envelope in this issue of *HaYidion*. Please invest in RAVSAK so that RAVSAK can continue to invest in our schools and their leaders.

And I am going to turn my upbringing around and say that speaking about money, dare I say even *asking* for it, is to be *encouraged* when we are advocating for what matters most to our future. ■

Lesley Zafran is a member of RAVSAK's Board of Directors and immediate past president of the Donna Klein Jewish Academy in Boca Raton, Florida. lzafran@bellsouth.net

Good & Welfare

The **David Posnack Jewish Day School** in Davie, Florida, has broken ground on a new building for its Paul & Maggie Fischer High School, scheduled to open for the next school year. The high school's planned 50,000-square-foot home will also house Ram Gym, a new gymnasium and athletic facility for the entire school. The expansion comes amid celebrations of Posnack's 40th anniversary and in response to growth in enrollment particularly in the upper school grades, where enrollment has increased by more than 50%.

Todd Clauer, upper school principal, college guidance director and teacher at the **Hyman Brand Hebrew Academy** in Overland Park, Kansas, has won the Educating Excellence Award from the University of Kansas School of Engineering, in partnership with local company Perceptive Software. He was nominated by his students and fellow science teachers.

RAVSAK is pleased to welcome our newest member schools, **Pardes Jewish Day School** in Phoenix, Arizona, and the **Epstein School** in Atlanta, Georgia.

Elise Prowse has been named the interim head of school at **Tehiyah Day School** in Oakland, California.

The **Lippman School** in Akron, Ohio, has been recognized in this year's Slingshot Guide for its partnership with the Northern Cheyenne Nation, entitled "Two Tribes, One Vision," which delivers a "method for Jewish identity building through immersion experiences of teaching, learning, and sharing with another culture similarly rich in sacred traditions and experiences."

Correction

Apologies to Tzivia Garfinkel for omitting her name from the Donor Listing page in the last issue of *HaYidion*. We are so grateful for her support.

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2013-2014 AVI CHAI Day School Census

The AVI CHAI Foundation recently released the fourth census of Jewish day schools in the United States. The study, based on enrollment data for the 2013-2014 school year, found a 12% increase in enrollment, accounting for 59 more schools and 26,437 more students since the last survey, in 2008-09. Since the first census, conducted in 1998-1999, enrollment has grown by 37%, or 70,000 students. As the author of the study, Dr. Marvin Schick, explores, hidden within this dramatic statistic is a story of staggering growth in some segments of the Jewish educational world, and considerable change and decline in others.

The astounding growth rate is largely accounted for by increased enrollment in chareidi schools, which are concentrated in the New York-New Jersey area. Yeshiva world and Chasidic schools have grown by 60% and 110%, respectively. Over the past 15 years, RAVSAK schools have also experienced meaningful growth, with gains of 4,500 students and 22 schools since 1998.

While the census counts 97 RAVSAK schools in 2013-2014, Dr. Marvin Schick, the author of the survey explains that this number does not account for the schools that have joint affiliation with the Schechter, PARDeS, or Torah U'Mesorah networks. As Schick writes, "RAVSAK has been transformed from a modest organization consisting of day schools that were not Orthodox in orientation and yet also not members of either the Reform or Conservative school associations to a major organization that now serves a considerable proportion of day schools in the US."

Schick elaborates on the developments in the broader world and Jewish community that have affected enrollment numbers, from the economic downturn in 2008, to the formation of the Hebrew charter school movement, the decreasing salience of denominational affiliation and Jewish affiliation more broadly. All these interactions reflect the reality that "the day school world is a part of a larger community and what happens in the general Jewish community inevitably has an impact on Jewish education." While the study predicts challenges that lay ahead for day schools—for some financial, and for others existential—the census also demonstrates the ever-evolving nature of day school education, and the flexibility and creative ways that schools have re-imagined themselves, to better serve the Jewish future. ■

Dear Cooki

■ by **Cooki Levy**

I am the new head of a Jewish day school who is considering moving my family into a home in the community I serve. While I value the convenience of living in close proximity to my work (and my children's school), I am concerned about potential difficulties that living so close to the school community may present.

How can I maximize the benefits of this arrangement and avoid some of the pitfalls?

Talk about a mixed blessing—this is it! You have highlighted the key issues to consider in your question. Let's take a look at the pros and cons.

There is no question that shortening the commuting distance between home and the work place is a huge advantage, especially if you live in a busy urban area. Given the long hours that heads of school work, the ability to come home for family dinners or just to have a few moments with your spouse and children before a night-time meeting is, as the commercial says, priceless. The time saved in avoiding lengthy drives both morning and evening can well be used for other things. And if you can walk to work, add the benefit of exercise and fresh air. While housing in your school community may be more expensive than in more distant neighborhoods, the money saved in car expenses will likely make up the difference.

In addition to this very practical view is the likelihood that the friends and neighbors in the community, also parents in your school, will share common values and lifestyle with you. They will be the people you want to socialize with, the ones whose children play with yours.

Sounds ideal, right? Only if you understand the boundaries that you must set for yourself, and, to some extent, for your spouse and children, and the potential complexity of social relationships. For while your friends and neighbors will welcome you, befriend you, and genuinely enjoy your company, you will still be the guy or gal responsible for making decisions they may not like, enforcing rules they may disagree with, and, ultimately, evaluating their children.

It is up to you to set the ground rules. Conducting school business in shul, on the sports field, or at a Saturday night get-together is not acceptable. Quick conferences while you stand on line in the grocery store or bakery are taboo. From the outset, you must state clearly that you are available for discussions with all parents and anxious to hear their concerns, but only in the appropriate time and place. No one but you can make others understand this.

On the other hand, just because they are your friends they should not lose the opportunity to talk to you about issues related to their child's schooling. Set up meetings in your office, not in your living room. Remind friends, if necessary, that your social relationship cannot enter into professional conversations. Your challenge is to be fair and honest. Be sure the response you make is consistent with what you would tell/do for other families. It will not always work. You must recognize that friendships may be strained, either in the short term or permanently.

Living in your school community also means that the parents in your school will watch what you do. Being the role model of the school will inevitably translate to your private life. What you wear, where you shop, where you eat, what you do on Shabbat, which shul you choose to attend—all these things will be noted. As is the case with celebrities (and, in a sense, you are one), the line between public life and private life will be blurred. But on the assumption that we live the values we teach, this does not have to be a burden to you and your family.

By the same token, you may see and hear things that you abhor. What is your role and responsibility? As a member of the community, do you comment on behavior that you witness outside of school (or school functions)? Do you intervene? Do you ignore? Stay away? School leaders have very different views on this—you must think about what you want before settling in.

You should understand clearly what the expectations of your board of directors

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Cooki Levy is the director of RAVSAK's Head of School Professional Excellence Project (PEP). Previously, she served as the longtime head of the Akiva School in Westmount, Quebec. Dear Cooki accepts questions from all school stakeholders. To submit a question, write to hayidion@ravsak.org, with "Dear Cooki" in the subject line.

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Can a School Control its Value?

■ by **Peter Gow**

Beyond budget columns and the bottom line lies something infinitely vague and precious: a school's value. How does a school create, communicate and convince others of its value? Gow illuminates the value that parents seek in a school.

Is our school worth it?

These five words lie at the heart of the private school experience—for families, for students, and for governing bodies. No matter what the dollar figures being discussed might be—four thousand or forty—this query lies at the center of the most critical conversations in a school's existence: parental decisions, board tuition-setting meetings, and even those casual social discussions that determine a school's reputation on the cocktail-party circuit or in the carpool caucus.

Naturally we tend to quantify "worth it" in monetary terms, but we know perfectly well that the investment a family makes in our school is greater than the size of the check they must write, especially when measured in anticipation and emotional commitment.

Former National Association of Independent Schools president Pat Bassett gave currency to the term "value proposition," which encompasses all of the tangible and intangible aspects of the school experience and which he famously, and accurately, reduced to a simple equation:

$$\text{Value proposition} = \frac{\text{Perception of value}}{\text{Perception of price}}$$

I think, though, that schools have an obligation to dig even more deeply into the notion of value proposition, beginning with a consideration of what, exactly, a family's decision to enroll a child actually means.

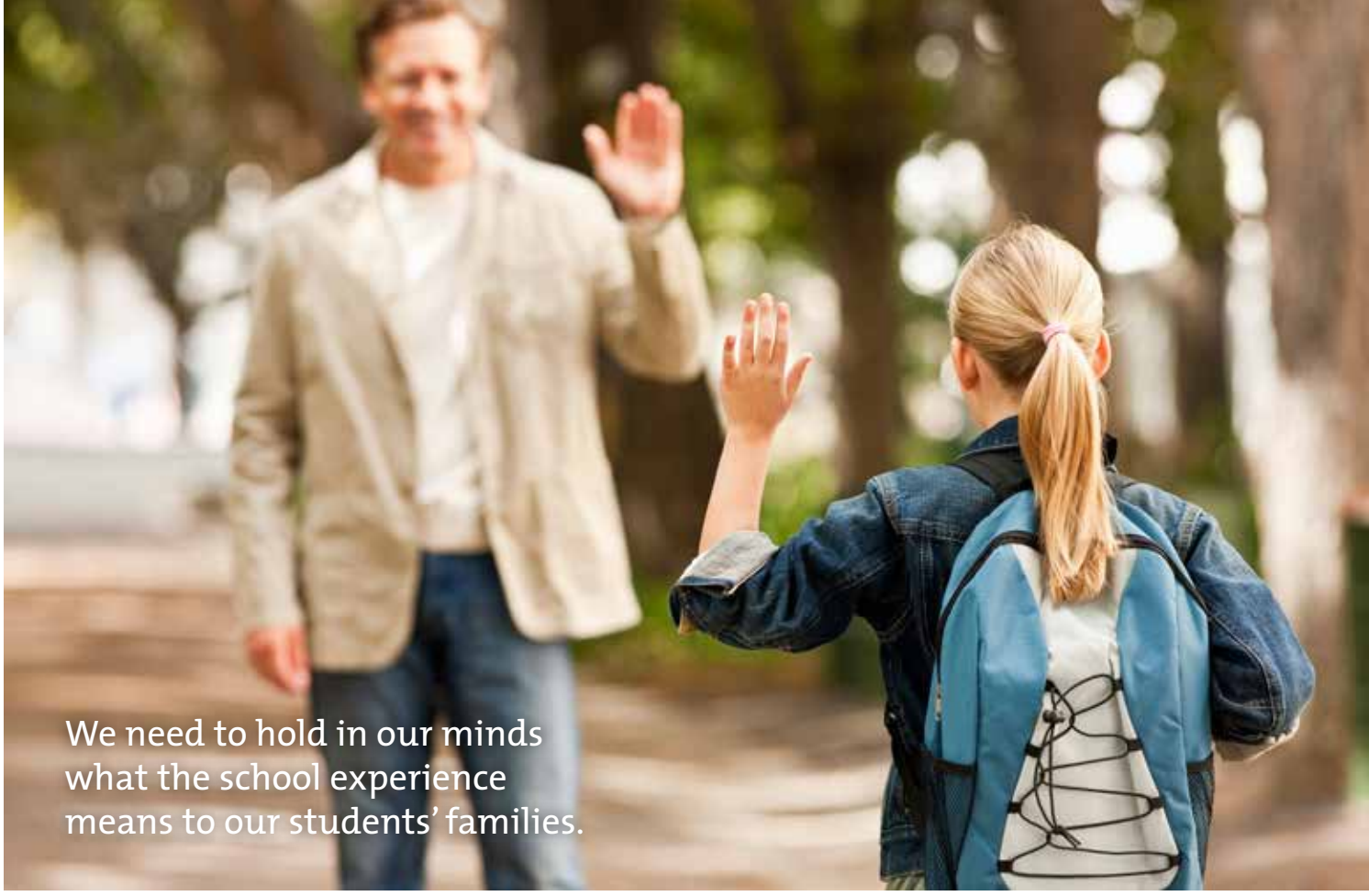
The Covenant

A family seeking a new school experience for a child is looking for many little things and one big thing. The "little" things, which of course comprise almost the whole of the day-to-day operations of the school, include the nature and quality of the curriculum, the quality of the teaching, the experience of the school's physical facilities, the quality of the extracurricular programs, the school's record in college or next-school placement, and (in varying degrees) the school's perceived "prestige factor" in the family's community.

> Each family has a dream for its child that is not just at the heart of a family's school choice but at the center of human parenthood.

The big thing, by contrast, generally lies outside the scope of things that the school can control at the outset. It is just this: each family has a dream, a vision, of what and who their child might become, and they choose a particular school out of a belief that it offers the environment and the program in which this development will take place. Whether its form is specific—"We want her to become a prima ballerina or a doctor"—or more fuzzy and open—"We want him to become the best possible version of himself and develop his mind and heart and body to the fullest possible extent"—this dream is not just at the heart of a family's school choice but at the center of human parenthood. It's so obvious, we often forget to note it.

Peter Gow is executive director of the Independent Curriculum Group and writes and consults on independent school teaching, programs, marketing, and strategic issues. peter@petergow.com



The parent or guardian signing an enrollment contract, then, is freighting this agreement with enormous emotional content. While an admission office may be excited they have a "great kid" and a "great family" as they tally another member of the class, the parent enters the relationship with a jumble of hopes and expectations. These will sort themselves out in time, and we have a huge role in the sorting.

It is critical that schools, no matter how much affection and respect they hold for their students and how hard they work to provide exceptional programs, teaching and support for them, acknowledge the emotional asymmetry of this relationship. A school may "love" a student and hold the highest of hopes for his or her success, but it can never love and experience the growth of a child quite the way a parent or guardian does.

This relationship, deep and extremely meaningful, is nothing less than a covenant, with great expectations on each side.

Why, exactly, are we working so hard?

Each day we arrive at school determined to provide a great educational experience. We strive to enact our schools' missions and values, but we are often stuck focusing on the operational side of our work, on quality control as an aversive response to potential or real "problems." We need to hold in our minds—a sometimes difficult task when helicopter parents are hovering and snowplow parents clearing obstacles and filling our hours with their anxieties—what the school experience means to our students' families.

To go back to Pat Bassett's equation, the key element is outcomes. But schools need to understand not just the nature of those outcomes—whether we use traditional measures or seek newer, "Big Data" measurements—but exactly what these outcomes look like and mean to our families and our students.

It's really quite simple, at least when viewed from 30,000 feet: what students and families experience at the school, and how the child develops there, must remain in alignment with the family's dream. This dream will necessarily evolve as the child grows and makes new discoveries about life and displays new interests or strengths or weaknesses, but all along the way the school experience must be felt at the very least as providing an academic *and emotional* framework capable of supporting the student as he or she moves toward the dream's fulfillment.

Our schools wax poetic on the quality of the relationships that develop between faculty and students and between students and students, but we need to understand the real nature of our relationships with families. These are not simply about "customer service" but about holding up our end of the covenant.

Building and sustaining value

There is no magic to understanding the ways in which schools must provide excellent programs and positive cultures, but there are several

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principles that need to be front and center as we make decisions about our schools and our work.

If we are devoted to helping families' dreams come true, the first step is to be emphatic and lucid in describing and communicating who we are and what we do as a school, from our mission and values statements to the nature of the teaching we offer and of the school "society" in which students will live. This requires excellent communication, but it starts with self-knowledge and a continuous process of honest self-appraisal. If we say we do something, we need to be doing it. If we say we eschew a particular practice or approach, it had better be absent from our campus. We cannot make promises anywhere in our culture with our fingers crossed behind us.

This clarity of purpose and practice must be accompanied by a clear internal understanding of what kinds of students and families we are best suited to serve—and of those who we cannot serve well. The temptation in a weak market is to be all things to all people, and the real danger is that we can convince ourselves that this is true. It almost never is, and schools that kid families and themselves into thinking they are will have a difficult time making the "perceived outcome" part of Pat Bassett's equation work.

Clarity of purpose and practice also creates certain imperatives for a school's strategic priorities: new academic approaches, new forms of organizing time or space or people, and even planning for new facilities need to be perceived as flowing clearly from mission and values and from the clear needs and best interests of students.

The school narrative and "outcomes"

Every school is a story, as is every student, teacher, alum and parent. The ineffable but arguably most important aspects of "perceived outcome" have to do with how this story unfolds as it tells of the school's heritage, of the current school culture, and of the school's (and each student's) future. With the exception of a handful of schools so venerable that their very names are bywords—Andover, Exeter, Eton—the narrative of successful schools is a narrative of student and family experience. Students go to school, they do things there, they grow and change, and in the end they move forward to something new. Happy families can describe this process in often moving detail, and happy alums can do the same. Happy students evidence this in multiple ways and on multiple occasions.

These stories, not placement lists or "data," are the outcomes that matter most to a school's value proposition and that provide the answer to the "Is our school worth it?" question. Placement lists are a kind of outcome proxy, and data is just data, but how people respond to a school experience matters. Remember, our task—as odd and even scary as it might be to phrase it this way—is to help facilitate dreams.

Assessing value

The idea that narratives are a school's primary outcome will sound awfully nebulous and feel-goody. We put (or should put) a great deal of effort into gathering data to evaluate the efficacy of our programs, and we are lately told that data is the key to understanding our present and our future. Of course on some levels it is, and yet I firmly believe that there are effective ways to gather and organize stories into a kind of table that gives us even deeper understanding of aspects of our work and that we can use to discern and adjust the alignment of our words and our deeds—and the effect of both on our communities and our cultures.

As part of some work I have done on messaging and branding, I have adopted the use of what Patti Crane of Crane MetaMarketing calls a "promise statement." A promise statement, generated at the end of a rigorous process of self-examination involving focus groups and extensive program and document analysis, is nothing more than a rather effusive, even florid description of what it is, exactly, that the school promises.

> Piece by piece, assertion by assertion, a school can collect and organize a body of evidence that suggests in aggregate that the school keeps its promise.

The promise statement is an enumeration of what the school is and does, what it intends its outcomes to be, and what the experience of the school is like for various constituencies. The format might include separate paragraphs talking about a school's values, its faculty, its students, what its graduates are intended to "be like." Here is a sample paragraph from a promise statement:

Trusted and encouraged to be the best versions of themselves, our students become independent and original thinkers, loyal friends and forthright allies, and compassionate and self-assured participants in their communities and in their own lives. Prepared to thrive in the most demanding educational environments and in the world, our graduates are passionate learners with a developed capacity for ethical leadership, seeing multiple perspectives, setting appropriate life priorities and goals, and creative and effective action. Above all, our students are prepared to take their parts in stewarding a shared and precious planet.

Some schools are tempted to adopt the promise statement as a marketing tool or even a mission statement, but the language is really much too rich and even highfalutin for public consumption. What I believe the promise statement can do best is to serve as a kind of touchstone, phrase by phrase, for assertions about the school: Is this phrase or assertion true, and what evidence can we bring forward to "prove it"?

Our Client is the Jewish Future
RAVSAK
רשת בתי ספר קהילתיים

Reshet Roundup

Where can school leaders turn to find expertise and guidance on topics as far reaching as

- How to handle well intentioned board members who overstep their responsibilities?
- Where to find resources about Hebrew language acquisition for students with language-based learning differences?
- Creative, low-cost methods to support educators of students with special needs?
- Strategies to support and ensure a healthy board chair–head of school relationship?

RAVSAK is home to over a dozen networks, each called a reshet, in which these kinds of questions are fielded each week. The above questions represent actual topics discussed within the RAVSAK Board Leadership Reshet and the Reshet for Learning Specialists, the two groups that we will highlight in this month's column.

The RAVSAK Board Leadership Reshet is open to board members at each of our member schools. The reshet is facilitated by two dedicated lay leaders, Lesley Zafran of Donna Klein Jewish Academy, Boca Raton, Florida, and Alex Sagan of JCDS, Boston's Jewish Community Day School, as a home to a tremendous amount of shared knowledge and opportunities for growth. This fall, the Board Reshet launched a monthly reading group to discuss articles of relevance to board leadership and governance. In addition, a mentoring program to support new board chairs in their unique circumstances is run by experienced board chairs.

Members of the Board Reshet have shared their experiences around support and evaluation of their head of school, their processes to recruit and elect new board members, the role and balance of parents on a school board, the effects of head of school searches on pending grant proposals, comparing benefits packages for heads of school, and creative fundraising and recruitment ideas, among dozens of other conversations. If a board member in your school is interested in joining the Board Leadership Reshet community, please reach out to Dr. Idana Goldberg, idana@ravsak.org.

The Learning Specialist Reshet was created in direct response to a request from the field. A few school employees approached RAVSAK to ask whether we could work together to create a support network and peer learning group for school employees who oversee special needs learning in their schools. Rather than serving as a group for teachers of students with special learning needs, this network was developed specifically for those supervising the system of special needs learning in their schools. Reshet facilitators Gussie Singer of the Agnon School and Yael Krieger from Jewish Community High School of the Bay have shown incredible dedication to moving the field forward for special needs learners and educators.

Within weeks of accepting applications to this reshet this fall, more than sixty schools and professionals from educational nonprofits have joined the learning. They have already shared invaluable insights with each other including tips to help teachers take responsibility for student learning plans, resources and research currently available to assist in Hebrew language acquisition, inclusion of support staff in curriculum planning and modification, and how to use secure folders on Google drive to give teachers access to student profiles. Do you have a faculty member who oversees special needs learning in your school? If so, put them in touch with debra@ravsak.org to join this network. ■

Can we adduce, in the case of the sample, stories or examples that demonstrate original thinking among the school's students, or evidence that they can lead ethically and act creatively? The easy part of this one, in fact, is to find out whether students "thrive in the most demanding educational environments" after graduation.

Piece by piece, assertion by assertion, a school can collect and organize a body of evidence—qualitative data, if you will—that suggests in aggregate that the school keeps its promise; that is, that it upholds its end of the covenant it makes with families and students.

Does the promise statement by itself "prove" value? Of course not, any more than any other single page of information about the school. But the creation of a promise statement (by objective outside professionals trained in the methods of listening, observation, and drafting that are required to do the work well, please) can be a first step toward understanding the elements of a school's program and culture that bring about the outcomes, real and perceived, that make up the crucial numerator of Bassett's value proposition equation.

In the end, a school has only so much control, year by year, in the dollar figure at the core of "perceived cost." What a school can control, by self-reflection, honesty, and an enormous amount of hard work to be who it says it is and do what it says it does, is the perceived outcome. Not every student will be admitted to the Ivy League, but every family can be well satisfied, even elated, that their child has been happy and challenged and that their collective dream for their child has come, in whatever way, true. ■

The State of Financial Aid in Jewish Day Schools

■ by **Harry Bloom**

Tuition assistance can be one of the most stressful parts of the relationship between a school and parents. Fairness and transparency are critical. Bloom has surveyed the field and offers here a report card of how day schools measure in a variety of best practices.

In the fall of 2014, recognizing the importance of financial aid to day school families, the Partnership for Excellence in Jewish Education (PEJE) surveyed 56 diverse Jewish day schools from across North America to learn about their financial aid practices. Using questions from PEJE's new Recruitment & Retention Self-Assessment Tool (RSAT), which enables schools to assess where they stand relative to best practices, we were able to analyze the current state of financial aid.

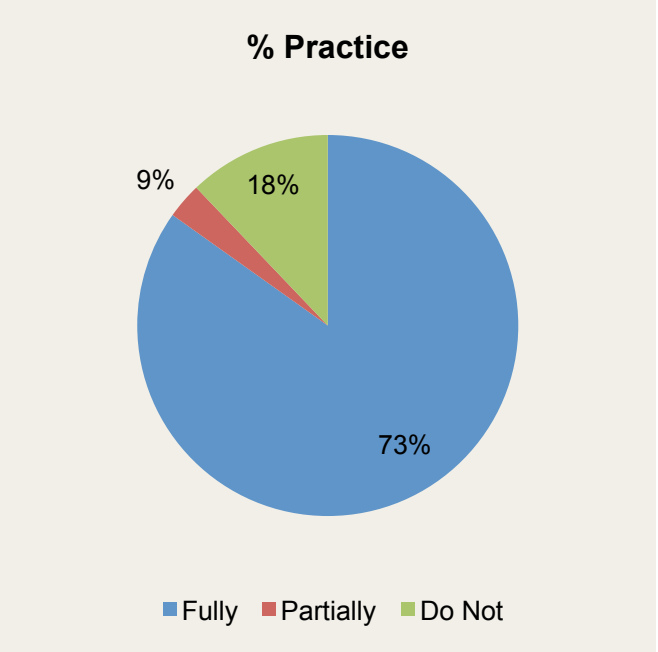
The results were revealing. We learned a great deal about how financial aid really operates: where the procedures are strongest, and where the field needs to do some work. The findings, presented for the first time in writing, are detailed below. Our research shed light on the sophistication of practices and also their user-friendliness. Such a nuanced analysis is critical because (a) a majority of day school families now receive some sort of aid—a far different situation than was the case 10 years ago; and (b) how parents feel about the financial aid process colors their feelings about their school and can lead to decisions not to explore or to enroll or, for enrolled families, to word-of-mouth support or negativity. This, in turn, can have a huge impact on enrollment.

Review Layer

One significant element we considered: How schools do, or do not, use third-party tools and/or resources to assess prospective families' ability to pay tuition. To be effective, this kind of outside evaluation must be designed to reflect criteria based on a community's—and target segment's—Jewish lifestyles and financial situations.

We looked into which schools employ a third-party review layer and learned that 73% of those surveyed fully did so. It was good to find that the great majority of schools engage in objective collection and assessment of financial data, as 18% do not engage third-party reviews and only 9% have partial additional review layers.

Respondent schools clearly understand the difficulty in trying to assess communal affordability rates, in an *objective way*. We believe that is it smart, and politic, to trust this particular part of the financial aid process to outside experts.



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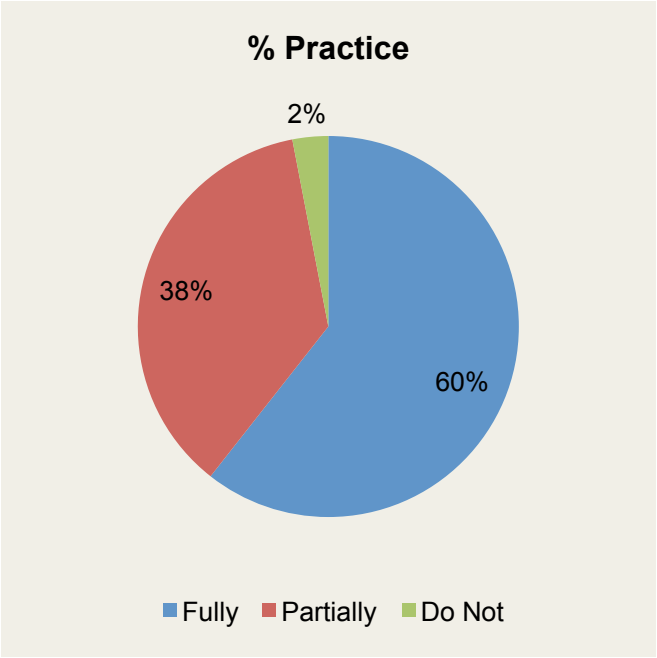
Our school utilizes third-party tools/resources to assess families' ability to pay. These reflect criteria based on our community's and target segments' lifestyles and financial situations.

The Language of Accessibility

We know that language plays a big part in the fiscal culture of every school, and how families perceive the friendliness/supportiveness of the financial aid process. So we asked if there was common, consistent messaging, heard in both admissions *and* the business office, reinforcing the school's desire to include an economically diverse group of families.

What percentage of schools surveyed believed in the fiscal application of *Kol Yisrael arevim zeh la-zeh?*

More than half of respondents—60%, in fact—said their schools' staff were fully unified in how they speak about financial aid, while 38% were only partially so. This is encouraging news, and it suggests that we, as a field, need to make it easier for the 38% to convince their entire kehillah to talk about fairness and a desire for accessibility and financial aid.



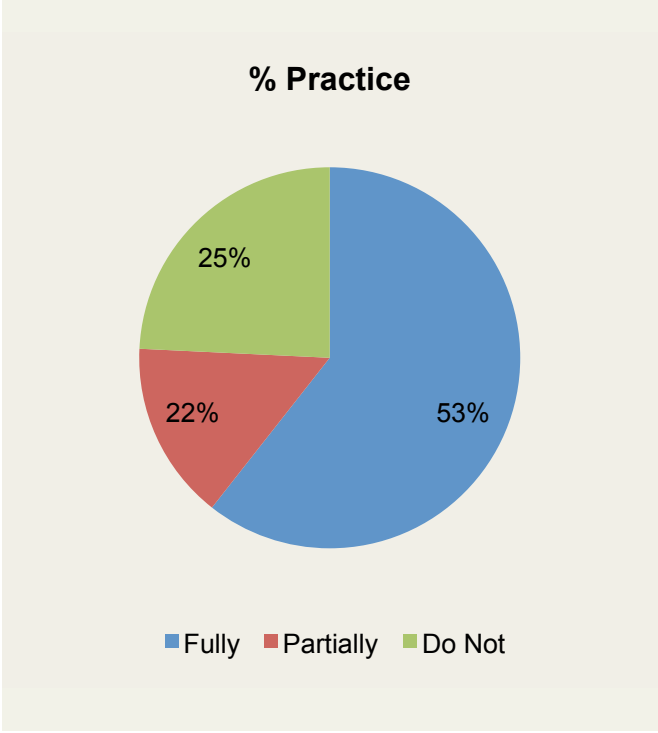
Our school develops common language about the school's tuition and financial aid policies among the admission director, business office, and financial aid committee to ensure families receive consistent messages about the school's desire to make itself accessible to a broad range of families, consistent with its financial sustainability.

Coordinating Financial Aid and Admission Timelines

Financial aid decision timelines are *very* important. A school with a healthy and friendly financial aid program will communicate financial aid awards coincident with when admission offers are extended. The idea: families should understand school cost before enrollment deadlines are reached.

Our research says that 53% of schools fully comply with the practice of communicating awards and admission offers concurrently, but a rather high percentage—25%—simply do not, and another 22% do so only partially or inconsistently.

Synchronizing the announcement of financial aid and enrollment is strongly advised for all schools desiring to maintain and expand enrollment. A caring school needs to respect its families' desires to make fully informed decisions.



Our school communicates financial aid awards concurrent with admission offers to enable families to understand what school will cost for their family before enrollment deadlines are reached.

Clear, Timely Communication and Easy Access to Financial Aid Committee

Financial aid is a complicated business, and it is the responsibility of Jewish day schools to communicate about this in as clear and timely a manner as possible. In addition, it is essential that the families that are financial aid candidates can easily access the school's financial aid committee to ensure there is a full understanding of their situation and to feel "heard."

How did the responding schools do here?

Fairly well, in fact: 44% report that they are fully compliant, while

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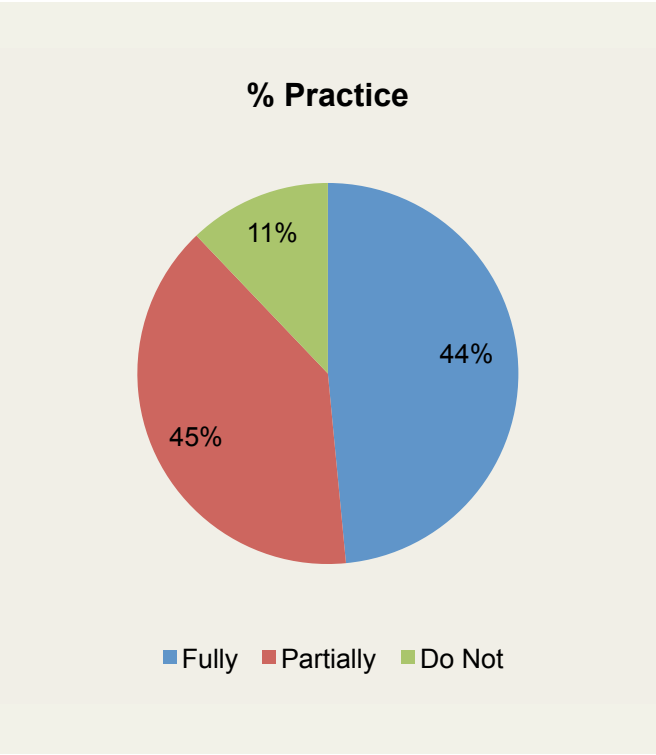
45% say that they are partially so. The notion that so many schools provide access to the financial aid committee tells us that there is a real will to construct humane financial aid processes, and for that we can all be proud. Yet, there is room for improvement.



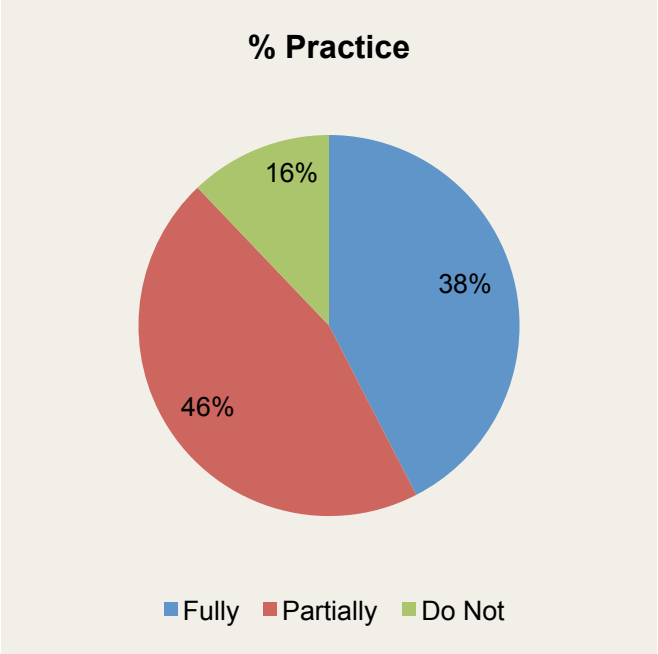
There is a clear and timely financial aid appeal policy communicated to families via a variety of electronic media and regular mail to enable easy access to the school's financial aid committee.

Publicizing Financial Aid Guidelines and Timetables

The process of applying for financial aid can be fraught with tension and embarrassment. Increasingly, even middle-income families who are making "good money" have to apply for aid. Therefore, some schools have designed their programs specifically to encourage middle-class families to apply for aid and not simply walk away because they feel day school is unaffordable. To that end, we inquired just how carefully schools created and publicized their financial aid guides and timetables with this end in mind.

In this case the partials win: 46% of respondents said "partially," while 38% responded "fully." 16% of the schools answered that they "do not."

Taking care to communicate clearly and in a tone that helps preserve families' sense of dignity is not only consistent with our values as Jewish day schools, but simply smart from a business standpoint. This should be an area of focused improvement in our view.



Tuition assistance guidelines and timetables are well publicized and carefully designed to attract and retain middle-class families.

Wanted: Transparent, Longer-Term Tuition Plans

Schools that are listening carefully to prospective and current families are requesting more visibility and predictability for tuition levels. PEJE's research suggests that even families who are curious about day school are hesitating because they cannot project the cost more than a year at a time.

Perhaps the biggest area we found wanting was that of long-term tuition announcements. We believe that making multiyear tuition announcements is central to affordability in that such allow a sense of predictability for families.

A majority of schools, 58%, do not make such announcements. Only 11% do, and 29% indicate they are somewhere in between, meaning they provide directional guidance about tuition plans but not definitive numbers to which they will commit.

It takes disciplined long-term operational and financial planning to be able to make future tuition announcements. We believe this is a key emerging requirement for a truly accessible day school system. We strongly recommend that schools take the long view here and find ways to plan, for themselves and their families, for the future. Short-term thinking can have disastrous consequences, not just for a financial aid program, but for a school's overall fiscal health.

The bare truth: Jewish day schools really need to do more to view financial aid through the lens of families involved!

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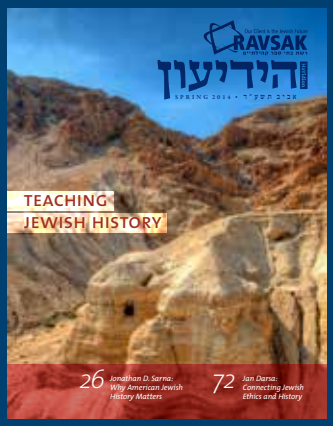
Support RAVSAK!

Over this past year, RAVSAK published four extraordinary issues of *HaYidion*.



Did your head of school reference *HaYidion* at a staff meeting? • Did you participate in a social media conversation about a *HaYidion* article? • Did you copy a *HaYidion* article to share with your fellow board members? • Did *HaYidion* offer you models of educational leadership or implementable new strategies? • Did a *HaYidion* article deepen your knowledge and broaden your perspective?

Then we invite you to make a gift to RAVSAK to show your appreciation for the value that *HaYidion* brings to you, your school and the Jewish day school field.

Please invest in RAVSAK so that RAVSAK can invest in our schools and their leaders.

Dear Cooki

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are in terms of your active involvement in Shabbat or other weekend programs. Because you are part of the community and presumably in walking distance, is there a requirement that you attend school functions on Shabbat or holidays that fall under another administrator's jurisdiction? Does it "look bad" if you do not go, even though you do not have any specific role to play? Similarly, what about the bar mitzvah or bat mitzvah observances of students in your school: must you attend each one? Some? None?

Other choices are more personal. Do you have to invite your school families for Shabbat or holiday meals? Only if you want to. Can you invite some children home to spend time with yours, while not including everyone? Absolutely—all children have close friends. Similarly, can you develop close personal relationships with others who are technically your constituents? For sure, but always bearing in mind the boundaries you have set and the absolute confidentiality and discretion which govern your conversations. Will there be uncomfortable moments in the midst of a social gathering? Undoubtedly, and your ability to ignore, deflect or re-direct the conversation will be critical.

It is easier to live in some communities than others, to be sure. In some instances, there will really be no choice—there is one Jewish community and it hosts your school. In that case, the guidelines above, and others that you set for yourself, will be critical to your comfort. If there is a choice, you will have to balance the advantages and disadvantages, to you and to your family, of settling within your school community. ■

Transparency in School Compensation

■ by **Maccabee Avishur**, **Dina Rabhan** and **Shira Heller**

As with tuition assistance, fairness and transparency are crucial to the recruitment and retention of outstanding faculty. The authors present steps for administrators to build trust during the hiring process and throughout teachers' employment.

What percentage of your school's operating budget goes to salaries and benefits? If your school is like most, the answer is probably between 65% and 80%. In other words, your single largest budget line, by a long shot, is compensation for your faculty and staff.

A large salary range undermines efforts to find the best candidates by setting your sights too broadly.

However, while the compensation line is the heavyweight of your budget, it is likely one of the most opaque and least understood. Research indicates that increased transparency during the hiring process and beyond benefits schools.

Salary Transparency During Hiring

To Include Salary or Not?

Have you ever met a candidate who was attracted to your school because the job description stated "Competitive Salary Commensurate with Experience"? Probably not.

Trust and transparency begin in the hiring process. Publicizing salary immediately demonstrates a school's honesty, openness, and integrity, as well as the value the school places on treating faculty as respected professionals. This will help attract the types of candidates in whom you are likely interested.

Before you think about publishing a salary, you have to seriously consider what type of teacher you are looking to hire by looking at your school's culture, readiness to support new teachers, and budget, as well as current salaries among local schools. You might then set your sights on an experienced, highly qualified teacher who will wow from day one. Or you might prefer to hire a less experienced teacher who, with formal mentorship and support, can grow to embody your school's unique mission. Research supports what might seem obvious: higher pay is correlated with attracting higher-quality candidates. Some schools try to hedge their bets by publicizing a large salary range, thinking that they'd pay $35,000 for a "green" candidate or $65,000 for an experienced one. Such a large range undermines your efforts to find the best candidates by setting your sights too broadly. In general, if you have $65,000, set your salary range tightly around that number, unless you're philosophically committed to recruiting a teacher new to the field.

It is worthwhile to note that compensation is not synonymous with salary; fringe benefits should be considered, too. Schools should openly advertise their entire benefits package, including medical, dental, paid-time-off, retirement plans and tuition remission. In addition, work-life balance is incredibly important to many teachers, especially millennials. Candidates will be attracted to your school if you offer teachers a good balance of prep time or flexible scheduling that enables a life outside of school.

Fears and Concerns

School leaders typically have several reasons for not wanting to include specific information about compensation in their job postings.

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Shira Heller is assistant director for professional development at the YU School Partnership. seheller@yu.edu

Dina Rabhan is director of recruitment and placement at the YU School Partnership. rabhan@yu.edu

Concern #1: *Advertising the salary range disadvantages the school during salary negotiations.*

Response #1: Some school leaders believe they can get a bargain if they do not disclose the maximum salary possible, and are reluctant to list a salary range for fear of paying more than the minimum their candidate of choice would accept. Most candidates know this and enter into negotiations feeling disadvantaged and suspicious. Including the range is a sign to candidates that your school is transparent, honest and professionally run.

If you're concerned about overpaying, rest assured that it is unlikely that you will meet and choose to hire a candidate whom you think is actually worth less than the salary you originally advertised. If you choose to interview and ultimately make an offer to a candidate whose qualifications don't match the minimums you established and advertised, you are not obliged to offer the advertised salary. You can tell the candidate so openly. Say, "We had computed that salary based on a list of qualifications, some of which you don't yet have. We'd like to make you an offer at a salary appropriate to your qualifications." Anecdotal evidence from colleagues in the field suggests that in the rare cases when this tactic is needed, it is usually successful. Candidates who apply without the requisite qualifications are ready to negotiate. Occasionally such candidates may walk away from the offer, but this is probably for the best in the long run.

Concern #2: *Advertising a salary range won't weed out the bad candidates, and, in fact, will encourage them! Plus we'll miss out on great candidates who aren't interested in the salary we're offering.*

Response #2: It is true that job seekers are sometimes unrealistically optimistic. Especially in the age of electronic applications, some candidates believe they have little to lose by submitting a resume via email even if they aren't qualified. These unqualified job seekers are likely to apply for your opening whether or not the salary is listed. Screening out clearly unqualified candidates takes only a matter of seconds. More sophisticated candidates, the kind you are likely seeking, desire an information-rich hiring process. They are actually less likely to apply to a job that omits salary information. In other words, you increase your chances of attracting your target candidates by advertising salary.

If your salary range is low relative to your competitors, concealing that information could lead to negative PR for your school that will turn away future potential candidates.

To ensure that your salary range is competitive, learn about aggregate salary information for your geographic region by consulting the local public school system and the YU School Partnership. If it turns out that your salary range is low relative to your competitors, consider why that is so and whether concealing that information will be more helpful or harmful in the long run. Candidates who invest time in the application and interview process may ultimately be severely disappointed when they learn that your salary range is below their salary requirements. This could lead to negative PR for your school that will turn away future potential candidates.

Further Reading and Resources

Correlations between teacher salary and teacher quality: Figlio, D. "Teacher Salaries and Teacher Quality." *Economics Letters*, 55(2), 267-271

Different rewards for different employees: http://www.yuschoolpartnership.org/school-leadership/leadership-development/107-articles/1706-current-thinking-in-compensation-structures

Salary bands: http://peje.org/old/docs/facultyrank.pdf

If your salary is low for the area but you offer other amenities and benefits that are potentially attractive to candidates, it can be helpful to list those along with compensation.

Concern #3: *My current faculty, many of whom are earning less than we plan to pay the new teacher, will express their frustration, incredulity, and hurt when they see the salary being offered.*

Response #3: It is true that if the salary you are offering is out of step with what current faculty are earning, staff morale will be affected. Current staff may feel empowered to demand more pay. If the position is a specialized one that requires specific training, and this is clearly communicated in the job description, your faculty probably will not take offense in the outsized salary. Recent research suggests that this is particularly true among younger employees who value giving different rewards to people with different skills.

However, if the higher compensation is not linked to special training or skills, you can expect some backlash from your current faculty. Explaining your reasoning for the higher compensation (challenges in recruiting, changes in the field, etc.) may assuage some anger. It's good to "get out in front" of this message early with your faculty to reduce potential backlash. However, if you feel that faculty morale will be negatively impacted, it may be wise to forgo listing the salary and to begin a strategic plan for creating a more transparent system of compensation in your school. This is a tactic that has worked well in managing faculty expectations and morale related to compensation in the public sector as well as in schools in the private sector.

What to Write

If you decide that you want to list salary, what should you write? Some schools prefer to list a range, as long as the range is not so large that it's meaningless to candidates.

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We strongly recommend the following. Decide on the minimum amount you will pay a candidate who meets your minimum qualifications. Then, advertise the salary with the following phrase:

"Salary starting at $x and up, commensurate with qualifications and experience."

This salary, coupled with your indication of the experience required, will help you attract candidates from your target market, whether beginning teachers, mid-career folks looking to change schools, or teacher leaders.

Beyond Hiring: Salary Steps and Bands

Misconceptions abound regarding how much school employees earn. This is true both within schools and without. Within schools, few faculty members have any idea what the median compensation is in their school or geographic region, how much someone else with their experience and training might be earning in the school, or what factors influence salary decisions. Outside schools, parents and other stakeholders harbor misconceptions that are often in competition with one another. Some believe we spend too much on faculty and (especially) administrative pay while others believe we pay our educators (especially the teachers) too little.

As with advertising salary in the job description, Jewish schools are secretive about their compensation practices because they see no benefit to revealing that information, but intuitively understand the risks. Most of these risks arise because school compensation is inconsistent. Transparency can be risky, but we believe schools have more to gain than to lose.

Publicizing a salary scale provides faculty with a known trajectory for their earning potential and ensures that faculty compensation is not subject to arbitrary decisions about perceived value.

Recruiting and Retaining Outstanding Faculty

It's not a secret that great teachers make great schools. Schools that are able to successfully recruit and retain excellent faculty stand the greatest chance of being excellent educational institutions. It's worthwhile to explore in depth three areas that can be combined into one compensation strategy that we believe will help your school recruit and retain great faculty: non-linear raises, salary scales and bands, and merit pay.

Non-linear Raises

Teachers who feel there is little room for economic advancement in your school will likely look elsewhere. Teachers are eager to seek opportunities in different schools because of the financial benefits they perceive in making the move. And they're usually correct. While those teachers can typically expect a small salary increase (usually 1-3%) if they stay at their current schools, they can expect a large percentage raise, usually 5-10% or greater, if they move to a new school.

For example, after three years of teaching, Sarah earns $45,000 at the school that first hired her when she finished her master's degree. In her fourth year at the same school, she might expect to earn $46,350 (assuming a 3% increase). However, if Sarah were to move to another school, our data show it is likely that she would earn $49,000 or more. School leaders indicate that above all else they value experience, making Sarah's experience highly valuable to other schools. It should be valued at her current school as well.

To address this, schools might consider non-linear wage increases. While salary might increase at a known rate from year to year, milestone years could be marked with outsized increases. For example, during her first three years, Sarah could expect an increase of about 3%. Then, between years 3 and 4, she would receive between 5 and 10% to maintain a salary commensurate with what she could earn were she to move schools. Her annual increase would drop back down for the next few years, but would jump again at year 6 or 7. This is how most public school districts operate their salary scales.

Salary Scales

Teachers want to know what they could earn in your school based on their training, experience and workload, and they want to know that they're being compensated fairly relative to others in the school as well as the field. A salary scale can help make this information transparent.

A salary scale consists of "steps" through which a teacher advances at a known rate based on known criteria, usually years of experience and degrees earned. For example, a school may have a 15-step scale ranging from $35,000 to $52,000 for teachers with a bachelor's degree and $40,000 to $62,000 for those with master's degrees. Another level may exist for those with additional advanced degrees or rabbinic ordination. Teachers advance one step on the scale automatically from year to year based on a fixed percentage increase (in this case, 3%) and the non-linear jumps we described above. In addition, teachers can jump from one level to the next by earning degrees during their tenure. Occasionally, the school board should review the scale and make a percentage improvement to the entire scale to keep up with cost of living increases.

Merit Pay

A few other steps are necessary to ensure that this system addresses any perceived drawbacks. First, specialized training and

knowledge must be factored in. This is especially relevant in an age when online and blended learning have democratized access to specialized training in areas like educational technology, school leadership and curriculum design, among others. More importantly, a salary scale that promises automatic advancement rules out recognition of praiseworthy practice or, on the other hand, sub-standard performance. Within a strict salary scale system, no financial incentive exists to perform well or grow professionally aside from earning degrees.

One way schools might seek to address these lacunae in the salary scale system is through merit pay. In a merit pay system, schools identify performance tasks and learning objectives that earn stipends within the salary scale. So, for example, if Sarah received stellar reviews on her semi-annual evaluations during the year, she might earn a $500 stipend in addition to her step increase. This performance stipend may be earned each year, but would not automatically become part of Sarah's base salary. If Sarah were to earn a certificate in blended learning, this might be awarded with a $750 stipend that would renew each year automatically much like the extra compensation she receives for her master's degree.

The teacher learning curve also complicates the salary scale. Many are familiar with studies that have shown that teachers' growth is most significant in their first five years in the field. This growth rate begins to taper off after year five, becoming relatively flat after year ten. In other words, a teacher in her seventh year might be as competent and valuable to a school as a veteran of twelve years, but her compensation in the salary scale described above would not reflect this.

An elegant way to address these drawbacks is to create a series of salary bands. As Sorrel Paskin has pointed out in his white paper "Consideration of a Faculty Rank System to Replace the Faculty Salary Schedule System" (available on the PEJE website), the creation of bands of teachers by "rank" allows schools to fluidly move teachers from band to band based on a mosaic of factors, rather than just years of experience. Readers are highly encouraged to read Paskin to better understand his system. Paskin's model may be modified, if appropriate for your school, by layering the bands so they overlap rather than leaving salary gaps between them.

Simplified Salary Negotiations and Getting the Most from Your Faculty

Creating and publicizing a salary scale (or bands) provides faculty with a known trajectory for their earning potential at your school. It also ensures that faculty compensation is not subject to arbitrary decisions about perceived value.

Salary offers to potential faculty and conversations with existing faculty are both simplified because every salary decision is based on years of experience, degrees earned and specifically described competencies. When salary increase requests are brought up, they present an opportunity to discuss faculty growth and opportunities for leadership.

For example, if Sarah were eager to increase her earning in the school, her school leader could take out the document describing the bands, talk about where Sarah currently falls and what her duties are, then speak about where she'd like to be, what behaviors she'd need to demonstrate, and the duties she'd need to accept in order to be accepted into that band. In this model, salary negotiations cease to be about feeling valued and justly compensated, and center instead on professional growth and advancing the school.

As your single largest budget item, faculty and staff compensation deserves the serious attention of a school's professional and lay leadership. When combined with other best practices in faculty management and educational leadership, transparent compensation practices can go a long way in helping our schools recruit and retain top-quality faculty, which ultimately is best for our children. ■

Day School Tuition
If You Lower It, Will They Come?

■ by **Daniel Perla**

Perla soberly surveys various efforts day schools have employed to boost enrollment through tuition abatement and urges caution. He finds a couple of other initiatives to hold greater promise for schools to attract and retain middle-income families.

In *Field of Dreams*, actor Kevin Costner plays an Iowa farmer who builds a baseball field on his land after hearing a mysterious voice which whispers "if you build it, HE will come." "HE" is a former baseball great who eventually appears on the Iowa ball field, joined by other (deceased) baseball greats. The film ends in true Hollywood style: throngs of people come to this Iowa ball field to see the former baseball greats play on Costner's land.

A significant number of Jewish day schools seem to be hearing a similar voice. Only this one is whispering, "If you lower tuition, they will come." Convinced that cuts in tuition will drive enrollment and help fill empty seats, individual day schools continue to experiment with a variety of non needs-based price reductions. Most of these programs offer free or heavily reduced tuition for both new and existing families in certain grades. Some offer significant tuition reductions for new families only. The primary objectives of both approaches is the same: fill empty seats and retain existing families. Some schools posit that their net tuition revenue will increase if enough empty seats are filled. Some schools seek a large donor to fund the difference between the old and new (lower) tuition. Many schools assume that their full-paying families will voluntarily contribute, on a tax-deductible basis, the difference between the old and new (lower) tuition.

> Even in the rare cases where a school or community of schools saw a material increase in enrollment, the lower tuition levels were rarely sustainable beyond a few years.

Having examined many of the non-needs based tuition reduction programs across the country, we have concluded that very few of the programs have led to meaningful increases in enrollment. Furthermore, in the rare cases where a school or community of schools saw a material increase in enrollment, the lower tuition levels were rarely sustainable beyond a few years. The schools were invariably forced to raise tuition at above average rates in the ensuing years. In addition, schools which presumed a high level of voluntary contributions from full-paying families were usually disappointed in the results. One California Jewish day school reports that in the very first year of its tuition reduction program, full-paying parents have contributed only 40% of the amount that the school projected. Other schools report that even where existing, full-pay families initially contribute as projected, new families do not. They theorize that they lack collective memory and are less inclined to contribute beyond the lower, obligatory tuition levels. The lower tuition becomes, in effect, the new normal.

To be fair, many non-needs based tuition reduction programs are either in their infancy or were simply not planned to last more than a year or two. In 2012, Milwaukee Jewish Day School announced a donor-funded program under which

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new students entering grades 1 -7 for the 2012-13 school year would have their first year tuition completely subsidized. The school believes the free tuition was responsible for a meaningful increase in its entering kindergarten class for the 2012-13 school year. The school discontinued the program after the initial year and reports that the entering kindergarten class for 2013-14 saw a decline in enrollment. Unfortunately, the school discontinued the program after the initial year.

Photo from the movie Field of Dreams

Similarly, two Jewish day schools in Pittsburgh have, for several years now, offered a free year of tuition for grades 2 and up. Their goal was to attract transfer students to their schools. Supported by a $50,000 marketing budget, the schools picked up 11 transfer students in the first year of the program. In year two, the school was unable to provide marketing support for the program. They picked up just 4 transfer students. While the transfer program still exists, it appears that the enrollment gains are now minimal. Might the schools in these two examples have seen continued enrollment growth had they continued their full support of these programs? While we don't know for sure, we remain circumspect.

Another community-level program bears mentioning. A decade ago, Cleveland's Agnon and Gross Schechter schools dramatically reduced their tuitions. The schools, encouraged and funded by Cleveland's Federation, believed that lower tuition would drive enrollment and posited that full payers would continue to contribute back the tuition differential. Enrollment did indeed grow approximately 20% in the early years of the program, but much of the enrollment growth came from families who needed very high levels of scholarship. Nothwithstanding a meaningful increase in enrollment, net tuition revenue may actually have declined. Within several years of the Cleveland program, voluntary contributions also declined as collective memory faded and the great recession set in. As a result, both schools have now taken above average tuition increases over the past few years.

The varied enrollment gains and the certain financial challenges in sustaining these tuition programs should come as no surprise. Measuring Success's Sacha Litman has long argued that day school enrollment is driven not by price but rather by perceived value among parents. In other words, schools which have high perceived parental value tend to fill up, regardless of price. Those with low perceived value, simply don't. In an analysis of enrollment at 200 schools, both Jewish day schools and non-Jewish independent schools, in the years before and after the 2008 recession, no relationship was found between tuition changes and enrollment.

> A family's decision to enroll their child in a Jewish day school cannot be reduced to an elasticity of demand or price curve.

In spite of our doubts regarding non-needs based tuition cuts, we are more optimistic about the potential for increased enrollment from both income cap and flexible or indexed tuition programs. These are needs-based programs which aim to drive day school enrollment by creating a unique tuition level for each eligible family. Under the income cap approach, tuition is "capped" at a certain percentage of a family's pre-tax income. This percentage typically ranges between 10% and 18%. Income cap programs generally target middle and upper middle income families with multiple children in day school. When executed properly, income cap programs enable families to accurately predict their tuition over a long-term horizon.

Flexible or indexed tuition programs can change the discourse around tuition and can help even the financial playing field. While lower rates of tuition are still offered to all but the wealthiest of fam-

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The Four Levers of Jewish Day School
Affordability and Sustainability

■ by **Yehudah Potok**

Sitting in his school's catbird seat, Potok describes what he sees, the economic conundrums that a great many day school leaders confront. Can heads and boards pull the economic levers to achieve the elusive dream of sustainability?

Every morning I wake up and bound off to school excited for a new day, ready to greet my students with a smile and meet the challenges the day holds in store. I love my job because of the students. I don't think any person would be crazy enough to be a head of school were it not for the amazing things children do. On a daily basis, we get to witness our students growing into empowered, engaged, and responsible members of Am Yisrael and the world.

Despite this exuberance, though, I sense that there is a cloud hanging over almost every Jewish day school. Heads of school are often being asked by the lay constituency to pull a proverbial rabbit out of a hat. They are expected to become creative with budgets and to rethink Jewish day school education in order to make it viable for the future. Day school affordability and sustainability have been at the forefront of every Shabbat table conversation since the recession hit in 2007.

The upward cycle: invest in your program to grow enrollment; expectations rise, causing further increases in program costs; tuitions rise to cover the cost.

Are day schools today really that much less affordable than they were 20 years ago? My parents' generation also stretched financially to make Jewish day school education a reality for their children. They skimped on vacations, didn't get the new car, and waited a few extra years before repainting the house. However, parents today seem to perceive Jewish day schools to be pushing through a ceiling of affordability. In part, we created this issue by perpetuating the theory of the upward cycle. The theory is to invest in your program in order to lead to further growth in enrollment. This seems to work but as a result parent expectations, as consumers, have continued to rise and therefore so has the necessity for further programmatic improvements. This then increases the cost to run these programs and the tuitions therefore increase to cover the cost—a continual upward cycle which now pushes the ceiling of affordability.

Stephen Kepher, development director at Seattle Jewish Community School, once said, "My favorite director of finance would always point out to the board that there are three basic factors at independent schools: class size, faculty salaries and tuition. A school can have any two of the following: small classes, high faculty salaries and low tuition—but not all three. If you want small classes and high (i.e., a living wage) salaries and benefits, then you have to have a high tuition. If you want lower rates of tuition then you have to have either large class sizes or low faculty salaries. This, of course, raises questions about your core values as well as what the market may allow (e.g., is there enough interest in your program to allow for a pool of applicants that will lead to full enrollment at any class size...etc.). Somewhere in the midst of all this is the intersection of affordability and sustainability." (From "Blended Learning: Some Love It, Some Hate It—But Everyone's Talking About It," a blog post by Charles Cohen on PEJE.org.)

There is a fourth lever which could be added to this list, namely fundraising. These are the four levers that a school needs to

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pull in order to create sustainability: enrollment, staffing salaries and structure (this being approximately 80% of any school budget), tuition and fundraising.

Any one of these levers can pulled in a significant way, in order to create sustainability for a school. But in all likelihood, each of these levers would need to be pulled simultaneously in order for it to work. The big question is how to pull these levers in such a way that a school remains affordable.

Enrollment growth is always an issue for day schools, and there continues to be a focus of how to increase enrollment especially of full paying families (even though according to our missions we do not want to deny anyone a Jewish education). On the staffing side, schools are coming up with very creative teaching models (staffing structures) in order to reduce costs: blended learning, multiage classrooms, online learning, co-op model (where parents volunteer their time to serve as unpaid administrators and teachers), to name a few. These models are being implemented while attempting to avoid diminishing the student experience.

AFFORDABILITY

But then it always comes back to the lever of tuition. Day schools continue raising tuitions in order to keep up with the rising costs of running our programs. However, as the tuitions rise, more and more families are falling into the tuition assistance category. Therefore, day schools are coming up with all sorts of tuition models in order to make day schools more accessible to the greatest number of people possible. We try to create transparency and consistency in our tuition setting so that families will be able to plan better. We create systems for families who don't want to go through the traditional financial aid process but still want/need to receive some sort of discount on tuition. The problem is that we need some way of paying for these new tuition models. We may save some students from leaving because of these tuition models, but we also incur greater expenses.

A Jewish day school cannot exist without some balance between affordability and sustainability. If tuitions become unattainable, there will be no students in our school. If schools make their programs so affordable that they don't take in enough income to run their programs then the schools become unsustainable and will close. Schools are challenged by this dilemma daily.

According to one definition, affordability is when something is "believed to be within one's financial means." It doesn't mean that it actually is within one's financial means, but rather that it is of such great value that one will find a way to pay for it. It has become clear that many Jewish parents today do not perceive the value of a Jewish day school education to be worth the tuition price tag. Parents today are demanding that the burden of day school affordability be shifted to the school/community. Whether it is through endowments, perpetual grants, government funding, or other sources, schools must find alternate revenue streams in order to offer a tuition that is perceived by today's parents to be affordable. This is the only way to sustainability for Jewish day schools at the moment.

SUSTAINABILITY

Lay and professional leaders keep pounding the pavement to increase giving among current donors and to try and find new revenue streams from new donors. Endowments and legacy giving have become the new buzzwords within the day school world in order to ensure our future (had we had this focus 20 years ago, we might not be having the same conversation around day school affordability today). There needs to be communal buy-in by families who no longer have their kids in day school, to bear the burden of our Jewish future. There have been any number of studies which show the impact of Jewish day school on our future as a people. Communities, foundations and federations need to understand this and make day school a priority. Without communal funding and support day schools will either disappear or become an education for wealthy Jews.

I cannot imagine a more fulfilling job than working in a Jewish day school. But if we are not careful, and don't pull all of the levers properly to balance out affordability and sustainability, there will not be any day schools in which to work. ■

Circles of Success

■ by **Suzy Bookbinder**, **Deborah Davidson Shapiro**, and **Mark Shpall**

The authors share their school's approach to integrating the financial and educational leadership into one collaborative system. The resulting circular organizational structure has ensured strategic partnership to match resources with needs, in line with mission.

"All knowledge you'll ever learn, every experience you'll have in life, are the circles. They're not the center. If you don't have a solid center, you'll have jagged circles, incomplete circles, many different circles." Rabbi Menachem Mendel Schneerson

As the last issue of *HaYidion* discussed, the only way to have the operations and philanthropy aspects of a day school be successful is if they are closely aligned to the school's mission. Too often, business departments are kept separate from a school's educational wing. At our school, New Community Jewish High School in West Hills, California (soon to be renamed the de Toledo High School), the entire organizational plan has been created and refined to ensure that operations and philanthropy never deviate from our mission and vision. The head of school and board of trustees have intentionally created a circular structure that connects the business operations with education, operations, philanthropy, board and students. In doing so, all the decisions of each of these departments can revolve around the number one focus of a school, providing the best Jewish educational experience for our student body.

The head of school and board of trustees intentionally created a circular structure that connects the business operations with education, operations, philanthropy, board and students.

On the operations side, this structure creates a synergistic dynamic that has led to many operational initiatives. For example, investing in greener High Volume Air Conditioning (HVAC) chillers and master control units that will reduce our carbon footprint was based on a board decision which will be financed by an advancement department initiative. This was inspired by the needs and input of our faculty and student body. On the philanthropy side, this structure has led to an inclusive, circular system that involves numerous stakeholders including the head of school, board, staff, volunteers, students, faculty and community members to make the process a good giving experience, so instead of just raising money, people are invested in philanthropy.

Organization

To ensure that the financial realm of a day school stays mission-centered and avoids the pitfalls of siloing, it is important to ensure there is a clearly articulated organizational chart that supports this. Our school's organizational chart is circular, a configuration specifically made to ensure all parts of the organization are connected to one another. While the head of school sits in the A ring, and is ultimately responsible for the decisions of the school, all the other parts of the ring are connected and the different rings (the A ring, the B ring and the C ring) are permeable and set up in a way to encourage and foster collaboration and interaction.

To solidify this vision, the education half of the school is part of the same circle as the business half of the school. In our organizational chart, the educational wing of the school is the top half of the circle while the business side is the bottom half, but each is intentionally attached and connected to the other. One way that this connection is ensured is through a weekly meeting where not only the members of educational wing are present but key members of the business half of the circle are represented as well (the COO, chief development officer, director of admissions, director of marketing, and the director of facilities). This meeting (termed our "B-ring" meeting for the circle of staff that are required to attend, although all faculty are invited) is meant to keep the head

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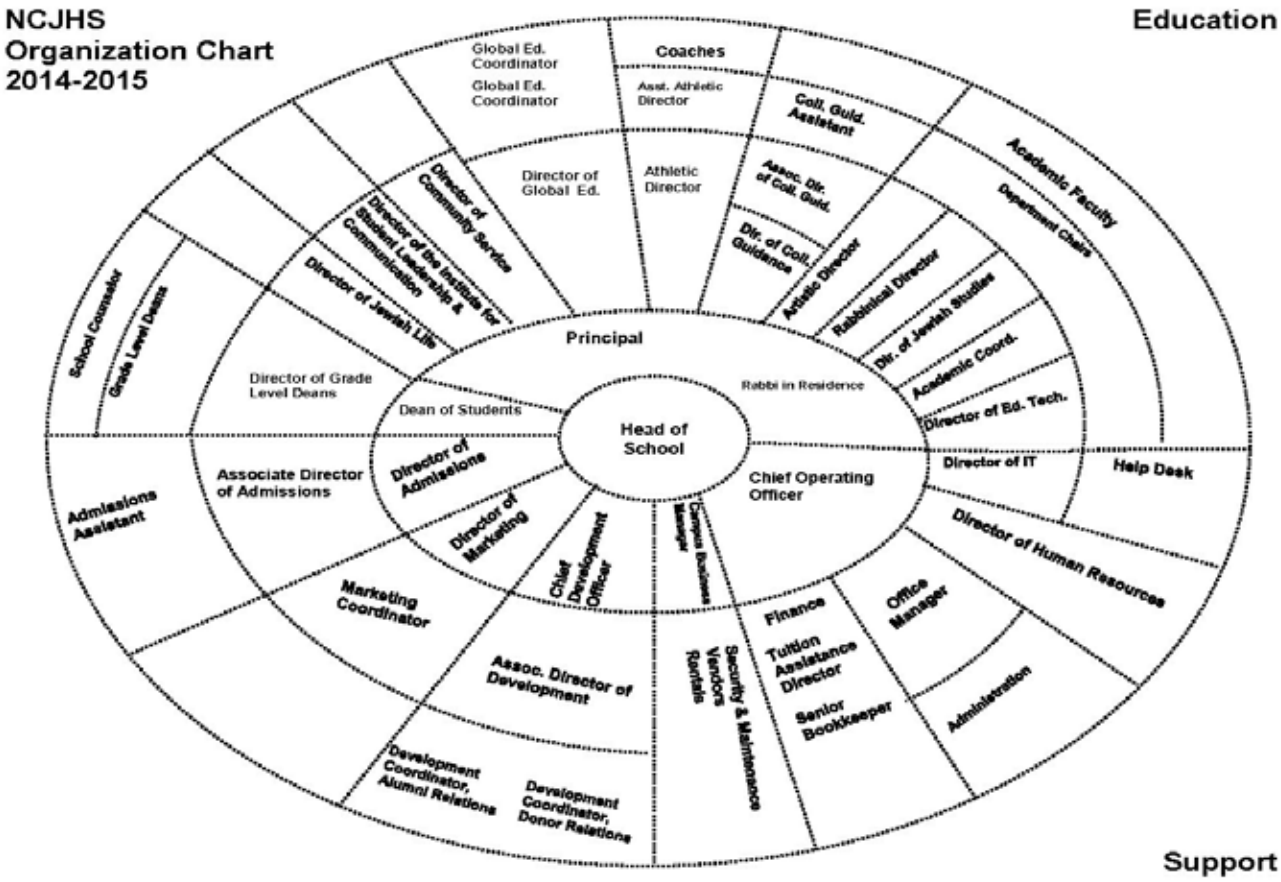

of school and all other parts of the school deeply informed and involved in all aspects of the school.

This B-ring meeting also allows for the business side to know what is happening on the educational side of the organization. Through this collaborative and iterative approach, the business employees are tied directly to the educational employees and vice versa so that all the discussions and decisions can flow from our mission statement of "building the next generation of Jewish leaders." This approach is modeled after the following story:

During a visit to the NASA space center in 1962, President Kennedy noticed a janitor carrying a broom. He interrupted his tour, walked over to the man and said, "Hi, I'm Jack Kennedy. What are you doing?"

"Well, Mr. President," the janitor responded, "I'm helping put a man on the moon."

In the early years, NASA's singular mission was to put a man on the moon and every employee from the top to the bottom knew that whatever job they were doing was meant to further that goal. We want to ensure a similarly shared focus at our school. Through our organizational approach, all sectors come together on a weekly basis to hear and discuss what is happening at the school and make philosophical and mission-centric decisions. In so doing, we try to ensure that every employee and every decision made, whether related to finance, admissions, development or education, always stays true to our mission.

At the school leadership's weekly meeting, members of the educational wing are present along with key members of the business half of the circle as well.

Operations

The education and nurturing of Jewish leaders does not happen without the support of the operational and advancement side of our organization. Our operational decisions are deeply intertwined with the advancement department, the board of the trustees, and the educational needs of the school. Every decision is looked at through the lens of our mission and the long-term view of sustainability of the school.

An example from this year demonstrates the way that our circular organization impacts operations. The chillers for the high volume air conditioning system needed to be changed. Teachers and students had complained about the daily variability of the classroom temperature and the facilities department had identified inefficiencies in the system. Therefore, operationally, there was a need for a substantial ($500,000+) capital expense. This is not the obvious, frontline type of donation advancement would generally be able to recruit.

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Therefore, out of conversations within B-ring and the facilities department, the facilities committee of the board of trustees (a group of lay leaders who understand the need to maintain our infrastructure) was approached. Based on the mission of the school and the push from student groups, the facilities department challenged the facilities and operations side of the organization to research HVAC chillers and master control systems that were both efficient and greener. The operations end then presented to the committee and board what the new HVAC system would save in future utilities expenses and the impact the greener system would have on our school's carbon footprint.

This proposal led to a deeper discussion between the board, the head of school and the operations department to research initiatives that would save the school both future utility costs and reduce our impact on the environment. This collaboration led to an initiative to create a strategic plan to research and install solar panels at our campus to virtually eliminate our reliance on the electrical grid. The board has since included the solar energy initiative as part of our strategic vision. On the educational side, we have worked with our environmentally focused student groups to learn how a business can positively impact the environment, and we will plan to have these groups as part of the process of rolling out the initiative.

Philanthropy/Advancement

"The heart of philanthropy is the art of relationship building. The mutual creation of that intersection between the organization's mission and the donor's philanthropic mission." Hank Rosso

Our advancement department has created an internal structure that mirrors the organizational chart of the school. Within the philanthropy program, the head, board, staff, volunteers, donors, faculty and students work in a cohesive, communicative team model. This model is always driven by the good giving experience of our donors. This model directly embodies our mission as it relates to the good educational experience for each and every student as the school helps to create the next generation of Jewish leaders.

The circular structure provides for consistent and concise communication. It provides opportunities for thoughtful discussion, insights, differing and constructive opinions while supporting the opportunity to create strategic vision. It motivates from the bottom up as well as from the top down.

The philanthropy program is also closely aligned with the culture of the school. Instead of fundraising, we use the word philanthropy. The implication of this semantic change is to understand that the root of the word philanthropy is "love of mankind." Philanthropy is about human relationships, not just about giving money. Our model is driven by these relationships and not merely for the financial gain. The best example of this is the recent naming gift given by a family whose child no longer attends the school. Due to the relationships that had been created over the prior years, the family approached us to make the gift, in spite of the fact that they would not personally benefit from their generous donation.

Stewardship, an important tool that is often neglected in the nonprofit sector, is about the circular relationships that we have with our donors. From the initial approach, through the cultivation and solicitation of a gift, we are building relationships. Our success is based on the relationships; we strive for the person-to-person model, donors soliciting other donors. We do not align ourselves with the university model or the Jewish community model which relies heavily on staff soliciting donors.

The good giving experience means being able to intertwine the needs of so many individuals with the needs of one dynamic institution.

In order for this process to be successful, we must exercise ethical accountability in the use of contributed resources. Similar to the mission of our educational goals where the students and parents invest in an education and Jewish leadership development that culminates with concrete accomplishments, we are similarly responsible to provide the proof of accomplishment based on the donor's requests.

In this way, we try to create a good giving experience for our donors; the philanthropy staff are driven in a similar way that the educational staff work to create a positive experience for our families and students. The good giving experience means asking and listening. It means providing the opportunity for donors, students, parents, staff and faculty to learn, be motivated, and to take action. It means being at the forefront of dynamic change and aligning the knowledge of the A-ring (head of school) with the needs of the community. It means being able to intertwine the needs of so many individuals with the needs of one dynamic institution.

"Alice came to a fork in the road. 'Which road do I take?' she asked. 'Where do you want to go?' responded the Cheshire Cat. 'I don't know,' Alice answered. 'Then,' said the Cat, 'it doesn't matter.'" Lewis Carroll, *Alice in Wonderland*

At NCJHS, it matters where our roads lead. Our school has been intentionally organized to ensure no road is straight and singular. Instead, all our roads are circular and interconnected to ensure the fulfillment of our mission to create the "next generation of Jewish leaders for whom Jewish values shape their vision." It is important that the educational, operational and philanthropic wings of the school are created to have the same goal and close communication and that they do not become siloed. For if they avoid this hazard, turning the Cheshire Cat's warning on its head, your school will have a better idea of knowing where it is going and how to arrive at that goal. ■

Our Client is the Jewish Future
RAVSAK
רשת בתי ספר קהילתיים

New Sulam Alumni Projects Deepen and Broaden Jewish Learning

This year, alumni of the original Project Sulam, a program of intensive Jewish study for heads and their lay and professional colleagues, are taking part in a range of activities that continue Sulam's trademark qualities, offering the highest opportunities for Jewish study combined with reflection upon Jewish educational leadership. After a rigorous application and vetting process, four schools were selected to receive matching grants for projects that enrich the Jewish life and learning in their schools in creative new ways:

Agnon School, Beachwood, OH:
Jewish Values Curriculum

N. E. Miles Jewish Day School, Birmingham, AL:
B'Yachad: Intergenerational Relationships

Portland Jewish Academy, Portland, OR:
Yearlong Family Education

Tarbut V'Torah, Irvine, CA:
Jewish Theology Curriculum

These schools have started to post monthly reflections about their projects on the RAVSAK website (go to "Blog" under the "News" tab). Participants are leveraging the program to engage in a laboratory of Jewish educational innovation. We invite people from across the field to learn and reflect along with them!

For Sulam's Jewish learning, we are pleased to announce that Rabbi Rachel Sabath Beit-Halachmi PhD has been chosen as the scholar-in-residence. New this year, the learning opportunities are extended throughout the year: in addition to the intense study seminars that take place during the Sulam Alumni Shabbaton, Rachel is teaching three webinar sessions. Rachel currently serves the Hebrew Union College-Jewish Institute of Religion as the National Director of Recruitment and Admissions and President's Scholar and heads the Office of Community Engagement. Previously, she served on the faculty of the Shalom Hartman Institute in Jerusalem and most recently as a vice president, where she directed leadership programs for rabbis, lay leaders and Christian leaders and led transformative study seminars for Jewish educators and IDF officers. Rachel was ordained at the HUC-JIR and holds a doctorate in Jewish philosophy from the Jewish Theological Seminary.

This year's theme is The Complexities of Jewish Theology. Rachel will guide us in the study of conflicting images and ideas of God in our sacred sources, and then lead us in an exploration of God in the work of modern theologians such as Abraham Joshua Heschel, Martin Buber, Mordecai Kaplan and others, showing how these thinkers build upon classical Jewish foundations to develop an understanding of God for our times.

Additionally, Sulamites have again undertaken to contribute posts to their own parsha blog, weekly reflections on the parsha and its applicability to leadership in our schools. To follow the blog and share it with your colleagues, go to http://ravsak.org/news?cat-id=51.

Our thanks again to the AVI CHAI Foundation and an anonymous donor for their continued support, enabling Project Sulam to remain a vital force in the life of dozens of day schools. ■

Money Talks | Exploring Values through the Lens of Money

■ by **Stefanie Zelkind**

Zelkind argues that the subject of money should not be reserved for the board and administrators. Students need to learn how to discuss money openly, and to understand how the way we handle money must align with deeply held values.

Capital campaigns. Scholarship funds. Teacher salaries. Tuition increases. Schools can't afford (quite literally) to ignore the topic of money. Indeed, board members and heads of school may well feel the bulk of their work is dedicated to money: raising it, allocating it, worrying about it. And yet, with rare exception, schools are not teaching their students about money.

Whether it's avoidance, fear or discomfort, schools seem to steer clear of the topic. As a result, students miss out on many opportunities to learn essential life skills, explore Jewish texts and traditions related to money and its uses, and ask big values-laden questions about themselves, their families, and their communities.

Here I offer six ideas for introducing the topic of money into your classrooms, and using it as a lens through which to examine core Jewish values with your students.

> When schools avoid teaching about money, students miss out on opportunities to learn essential life skills, explore Jewish texts and traditions, and ask big values-laden questions.

Teach Financial Literacy

Schools have a unique opportunity to introduce basic financial concepts and terminology. In teaching students about spending, saving, and investing, schools can help them establish a healthy relationship with money. Some may consider financial literacy to be "too adult" a topic, but research makes a strong case for school-based education on financial topics. Children are introduced to money at a very early age; indeed, several *Sesame Street* episodes address the topic, encouraging toddlers to set aside their money in three jars: one for short-term spending, one for saving, and one for charity donations. Curricular materials and online resources for different age groups abound. One great resource is Life$avings for Teens; although created by Jewish Women International for use with all-girl groups, much of the material is appropriate and relevant for boys as well.

Discuss Wants vs. Needs

Have a conversation about wants and needs. Even for adults, it's a hard distinction to make: do we need HBO, or just really, really want it? Do I need those new shoes? Do I need an iPhone6? For children and teens, it's even harder. Asking the question, simple as it may be, is a good place to start: "Do you need this, or just want it?" Then dig deeper, challenge assumptions, and tap into bigger issues related to deeply held beliefs or values. Introduce the concept of setting short- and long-term goals related to money, help students build personal budgets that distinguish between necessary expenses (needs) and optional ones (wants), set students on a course of having a healthy relationship with money. Note: this is not about (Jewish) guilt; it's okay to want things!

Align Money-Related Actions with Values

The ways in which we use money should reflect our values and beliefs. Especially for older teens, the opportunity to reflect on

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money-related decisions can be eye-opening. A student activist involved in child labor protests may discover that her new skirt, bought with her babysitting earnings, was sewn by underage, underpaid workers. Another student may become curious about how his parents invested his bar mitzvah gift money. Students may wonder why healthy, fresh fruit costs so much more than vending machine candy. Such conversations present all sorts of teachable moments; materials to initiate and facilitate such discussions include this guide produced by Ask Big Questions and curricula by American Jewish World Service.

Be Transparent about Money

To the extent that it's age-appropriate, engage your students in open discussions about money rather than conveying any discomfort you may have with money. Open their eyes to the complex money issues at school, such as tough allocation decisions (go on a field trip or buy new textbooks?), and share your decision-making process. Be prepared for tough questions—students will likely be very curious and perhaps judgmental—and be honest in your responses. Delicate topics like tuition and scholarship funds are harder to discuss, although if shared in a sensitive manner (and without singling out any students, of course), students can gain a new appreciation for the diversity of your student body and the core values held by school leadership.

Go Beyond the Bake Sale

Fundraising campaigns are commonplace among the student body as well as parents, alumni and the broader community. They present many educational opportunities, both technical and values-based. Students can (and should) engage in strategic thinking as they identify causes and organizations to support, set fundraising goals, and evaluate different methods and approaches (should we raise $1,000 from one person, $100 each from 10 people, or $1 each from 1,000 people?). Teach students how to build a budget (account for the money that goes into a fundraising campaign!) and a project timeline; these are skills they'll appreciate as they head off to college.

Tzedakah 2.0

While most day schools incorporate tzedakah into the curriculum and/or extracurricular programming, there are new ways students can learn about, and practice, giving. Jewish teen foundations bring together students as a "foundation board" to define a group mission, research nonprofits, solicit and review grant proposals, conduct site visits, and ultimately, work through consensus to arrive at a decision about where they want to give their money. Today, there are 106 Jewish teen foundations running in day schools, synagogues, summer camps, federations and other Jewish organizations throughout North America. Download curricular materials and "best practices" from the Jewish Teen Funders Network, including a teacher's manual produced by RAVSAK.

P.T. Barnum said, "Money is a terrible master but an excellent servant." How might an exploration of money serve your school and your students? How can you help your students become masters of their money and not slaves to it? How can discussions around money open up opportunities to ask big questions about personal, communal, and Jewish values? Like it or not, money is an essential part of our lives—and an ever-growing part of our students' lives. Let's help them become comfortable, thoughtful, and responsible in how they handle it. ■

Economic Justice and Policy in Jewish Sources

■ Interview with **Jonathan Brandow**

This interview, the first in a series of *HaYidion* author interviews, is published in partnership with the Jewish Book Council, a not-for-profit devoted to promoting the reading, writing, and publishing of books of Jewish interest (jewishbookcouncil.org).

Describe your personal journey in writing The Just Market.

About this time seven years ago, I read an article in the *Jerusalem Report* about Shmittah practices in Israel. The article quoted a religiously observant business leader in Israel's technology sector named Yossi Tsuria. He suggested that to align with modern realities, Shmittah practices should focus on high-tech rather than agriculture, replacing the ancient economic driver with its modern successor. He proposed that technology companies initiate work sabbaticals and forego new product development for the Shmittah year, instead assisting small and startup operations. Yossi's creative insight struck me and, during my next volunteer stint in Israel, we met. In between my own business, family and progressive political activism, it's taken me seven years to apply the kernel of his logic to the broader framework of Jewish economic policy.

Ancient Jewish economic policies responded to the same problems that plague us today: fraud; inequality; lack of employment; debt; a tilted playing field.

Of course, none of this took place in a personal vacuum. I was raised in a strong Conservative Jewish environment; I spent my early teen summers at Camp Ramah. Our family always integrated a strong social justice value as part of our Jewish identity. My parents had voted for Henry Wallace and the Progressive Party before I was born; in the early Sixties they spearheaded a fair housing council in our new suburban neighborhood. My mom was active in the first wave of the Students for a Democratic Society. My childhood rabbi was Alexander Shapiro, who stood with Abraham Joshua Heschel and Rev. Martin Luther King in Birmingham and went on to become a leader in the struggle for egalitarianism in the Conservative movement. Alex Shapiro stands out among those who fashioned my understanding of Jewish commitment.

Later, I became active in the movement against the war in Vietnam, was very involved in the progressive Zionist movement and spent two years in Israel, one of them as a construction laborer. On my return to the US, I graduated from Brown University, moved into rank and file labor activism and then was elected to union office. Although I drifted from both active labor work and affiliated Jewish life for a number of years, those early influences were never far from my mind.

In mid-life, several years after I'd entered a new phase of active Jewish life, I realized that much of the Jewish community ethos had slid from social justice advocacy to an increasingly complacent level of individualized comfort. I felt a real loss. I decided to research the basis of Jewish values I had always assumed—to see for myself whether the link between those values and economic justice issues was merely wishful thinking or substantiated by the source texts. If that relationship was solid, I wanted to create a substantive resource that I would have found useful and that I hoped others would as well. *The Just Market* is the result.

Your book ranges widely over classical Jewish sources to develop a framework of Jewish economic thought. What did you need to study to prepare to write The

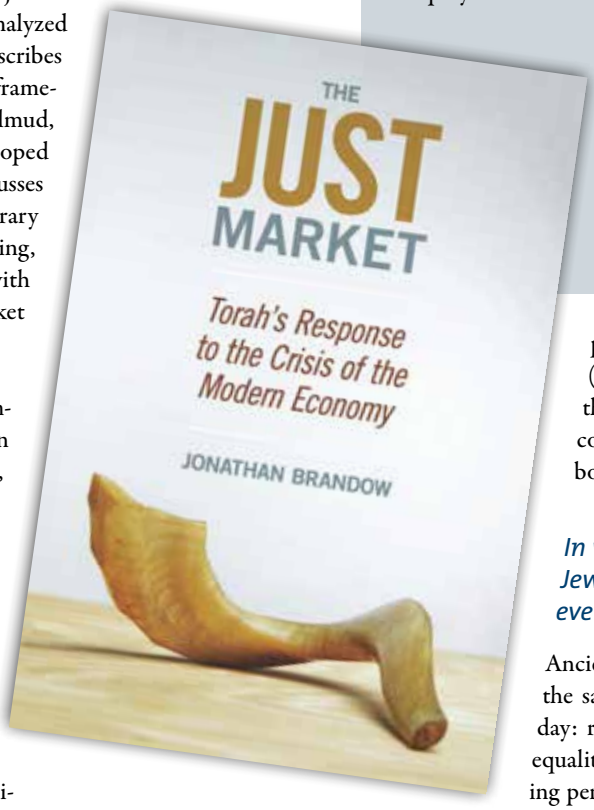
Jonathan Brandow is author of The Just Market: Torah's Response to the Crisis of the Modern Economy, *a business owner and former labor organizer who has written for* Tablet *and* Washington Jewish Week. *jbrandow@thejustmarket.com*

Just Market?

I was fortunate to have a secular experience that included ten years in a tough labor-management setting as well as some facility with economic statistics, a by-product of the industry research business I started in 1990 and still operate. My weak side was Talmud; I had never been involved in systematic study of it. I found it difficult to interest rabbis I knew in the concept of analyzing Jewish economic policy through the source texts. Luckily, my Hebrew is serviceable from my time in Israel and later studies, and modern technology made it possible to analyze specific subject areas in detail, simply by refining my electronic search techniques. I also accessed the infrequent but valuable subject literature in the public square—from Meir Tamari, Jill Jacobs, Hillel Levine and Hillel Gamoran—all of whom were of enormous help, though I differed with many of their assumptions and conclusions. To complete the cycle, I looked to the writings of contemporary economists such as Joseph Stiglitz and Paul Krugman, as well as others whose work touched on many of the same themes I identified in Torah and Talmud; and to contemporary observers of the Jewish condition such as Yehuda Kurtzer and James Diamond.

In broad strokes, describe what you discovered to be the Jewish view on trade and commerce.

I'll answer that, but first I should clarify that trade and commerce are only part of the broader subject of Jewish economic policy that is analyzed in *The Just Market*. The book describes the specific economic values framework presented by Torah and Talmud, examines the mechanisms developed to activate those values, and discusses their adaptation to the contemporary world. At the risk of oversimplifying, those values are more aligned with social democracy than free market capitalism.



The source texts do assume a competitive economy. Commerce is an important *player* in that picture, but its unrestricted growth is not the objective of economic policy derived from Torah or Talmud. Rather, ethical commerce is a tool which requires significant regulation in the interests of the general economic mission of facilitating access to the necessities of life (*devarim she-yesh bahen khayei nefesh*) to all of society's inhabitants.

Toward that end, ethical, honest business practices toward Jew and gentile alike are critical. Monopolistic practices designed to drive competitors out of business are condemned, as are hoarding and predatory loss-leading, which seek to create shortages and drive up prices. Commodity speculation in particular (which deprives communities and nations of the necessities of life) is prohibited. Trade and commerce must be conducted within a fair labor relations framework.

In what ways did you find that ancient Jewish sources are still as relevant as ever in today's complex market?

Ancient Jewish economic policies responded to the same economic problems that plague us today: rampant financial fraud; gaping income inequality; lack of employment opportunity; crushing personal debt; a tilted economic playing field. Even Talmudic-era science that was limited by its times expressed values that are still relevant. Wine, for example, was considered among the necessities of life by the Sages, subject to price and profit controls. A mechanical understanding of that doctrine today might be, "We now know that wine is not a

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The Six Foundations of the Just Market

Foundation 1—Access to the Necessities of Life: The Just Market promotes the opportunity for every person to access the necessities of life. It employs necessary regulatory tools to assure that access and the social stability that is its objective.

Foundation 2—Universal Employment Opportunity: The Just Market promotes universal employment opportunity through a series of social policy mechanisms and mandated set- asides.

Foundation 3—A Level Playing Field: The Just Market advocates for a level economic playing field that creates the broadest access to life's necessities and recognizes the needs of disadvantaged sectors and groups.

Foundation 4—Commercial and Promotional Integrity: The Just Market incentivizes ethical conduct and honest disclosure in market relationships. It condemns fraud in all its commercial and social forms, including character fraud practiced for monetary gain or power.

Foundation 5—Respect for Labor: The Just Market demands and rewards honest, respectful relations between employer and employee.

Foundation 6—Sabbatical Values: The Just Market advocates cyclical refreshment of the economic playing field, including alleviation of debt, the release of indentures both formal and informal, and the creation of a system of fair transgenerational transfers.

[CONTINUED FROM PAGE 33]
necessity of life, and so the controls are irrelevant today"; or perhaps, "The Sages said wine was a necessity then, and so it must be now."

But as the Talmud makes clear, wine was equated with life because it was considered the most effective of medicines. *Effective medicine* was the necessity. So when we ask ourselves whether Jewish economic values and policy should support a universally affordable health care system, the answer is "Of course." The ins and outs of the Affordable Care Act aside, it is a Jewish imperative to create universal access to the necessities of life; health care is naturally among them. The debate that we as Jews should have is how to define and advocate for those necessities in the modern age and the larger society in which we live. This is exactly what the rabbis of the Talmud—who like US Jews lived in a society in which Jews were not sovereign—tried to do. It is simply not a Jewish value to "liberate" the necessities of life into the free market.

In what ways did you find that Jewish principles need the most adjustment today?

Given two thousand intervening years and the enormous economic changes that accrued in the meantime, it's remarkable how spot-on the Jewish economic values of Torah and Talmud remain. Rather than submerging those principles, the real work lies in sharpening our understanding of the context in which the ancients discussed them and their modern applications.

Let me offer two examples.

In Mishnah Pe'ah, the rabbis of the Talmud look at a primitive mechanism, a catch basket in an orchard or vineyard, that deprives gleaners and laborers of work. And they outlaw it! Why? Because the landowner who places the mechanism "is openly stealing from the poor." He's robbing gleaners (and his employees) of productive work in order to increase his profit. That certainly informs the way we as Jews should consider the modern disparity between technologically-driven productivity improvements and their social consequences.

Does that mean that Jews, like Luddites, should oppose new technologies? Of course not. But it *does* mean that we have an obligation to stand with a Jewish voice for fair treatment of those whose lives are upended due to productivity improvements. In *The Just Market*, I propose a *Shikhekhah* Labor Displacement Fund that would take a portion of savings from all productivity improvements and devote them to new employment opportunities and training for workers displaced by a company's drive for additional profits. It's certainly possible to disagree with my proposed mechanism, but the principled obligation to compensate displaced workers remains.

A second example concerns the Shmittah release of debt. The debt forgiveness laws were mitigated by Rabbi Hillel's *prosbul* around the turn of millennium, and not much has been heard of them since. But Hillel proposed the prosbul because the laws weren't working *in the context of his times*; cyclical debt was rampant and had been since Isaiah had denounced the cancer of farm foreclosures more than eight hundred years earlier. The crisis that Hillel addressed was one of *not enough* capital lending to tide over farmers with insufficient cash flow. It was a devastating problem to which Torah, Isaiah and Hillel all responded; Josephus also writes of violent debt revolts in the Galilee later in the first century CE.

By contrast, today's domestic debt crisis results from *too much* capital availability, often fraudulently marketed by predatory lenders through the $30 billion payday loan industry, sub-prime mortgages and, as the *New York Times* recently exposed, the auto finance industry. So while the economic trigger underlying intractable debt has changed, the victims of the debt cycle have not. And so, as the Talmud indicated might be wise in a changed context, it's time to reconsider the prosbul as an instrument of Jewish economic policy—and for Jews to advocate for rational debt release policies, which I suggest should revolve around the Shmittah year.

What were your biggest surprises as you did your research?

I was pleasantly surprised to learn that Meir Tamari, the leading figure in what I'd term the halakhic school of Jewish economics, had identified over one hundred mitzvot linked to economic ethics and policies. That led to a second happy surprise: the realization that both Torah and Talmud not only recognized and struggled to address the real life economic problems of common people, but placed a premium on those efforts. All the more reason to elevate the profile of those conversations in our schools, synagogues and other institutions. That, of course, led to a third, less happy realization; this is difficult, sometimes scary stuff for many people, and I believe that the Jewish community has deliberately submerged the profile of these issues over the course of many years because of those fears.

What recommendations do you have for Jewish day schools about how to teach about Jewish values in reference to money and economics?

It's relatively comfortable to teach about personal conduct and commercial ethics. It's much more difficult—and I think, at least equally valuable—to encourage students to think about the social implications of business decisions, and the obligation of Jews to act in the world on behalf of economic justice values. I hope that *The Just Market* encourages that effort and makes it just a little bit easier for those who are inclined to undertake it.

For me, the most exciting aspect of this research was reading the daily newspaper. Every single day I found articles that spoke to the same concepts I was studying in Talmud. The striking relevance of our tradition to the modern world was, even in my sixties, exhilarating. Perhaps your readers might find a lesson in that for Jewish day schools as well. ■

The State of Financial Aid in Jewish Day Schools

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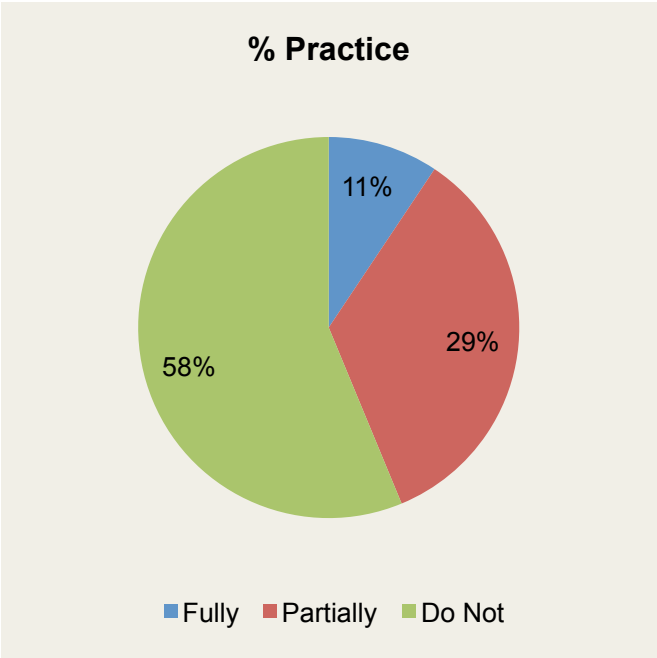


Our school develops long-term tuition plans as part of its long-term financial planning. These allow for the possibility of multiyear tuition announcements so that there is predictability for families over time.

PEJE's research suggests to us that the field is, by and large, aware of the business and human issues involved in financial aid and has taken some steps toward addressing it. However, in a time in which the number of financial aid families are soaring, we also recognize that continued customer-friendly progress must be made. It must be accomplished in a fiscally responsible fashion. To engage seriously in sustainable practice will involve intensified planning and the commitment of an entire day school ecosystem. The question is: Will we have the will and discipline to make it happen? There is a great deal at stake as we need to fill empty seats for reasons of mission and sustainability.

PEJE is researching new ways of setting and communicating tuition that enhance enrollment and sustainability. PEJE wants to hear from you about new approaches you have tried that work, and don't work. Please contact us to share your thoughts. ■

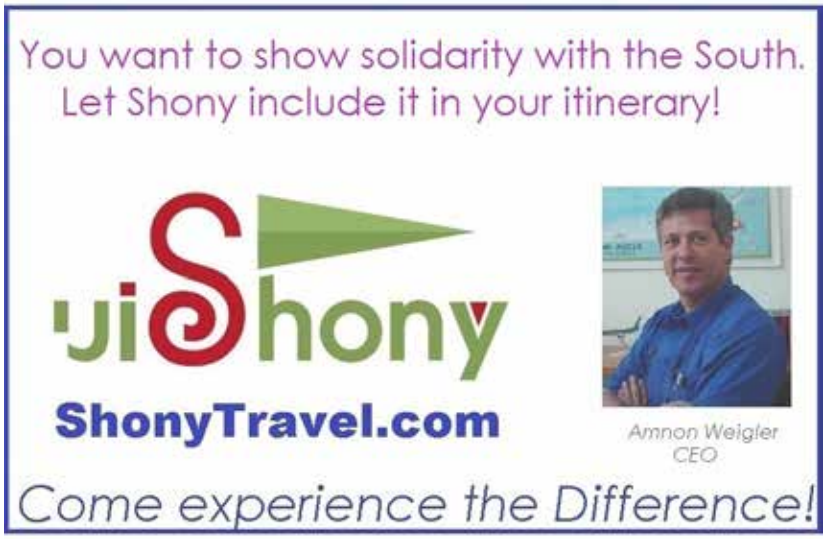
Day School Tuition: If You Lower It, Will They Come?

[CONTINUED FROM PAGE 23]

ilies, the term "scholarship" is eschewed in favor of the term "flexible tuition." Advocates of such an approach argue that accessibility increases when the term "scholarship" is replaced by "flexible tuition" or "indexed tuition." In addition to AVI CHAI's own middle income pilot program, two large modern Orthodox day schools, The Maimonides School in Boston and The Moriah School in Englewood, New Jersey, recently announced middle income programs. Both programs are self-funded by the schools and both schools report positive communal response to the programs. It remains to be seen whether the tuition discounts provided under the program will actually lead to improved retention and/or enrollment growth.

We understand why schools are tempted to lower their tuitions. Many assume that day school demand is elastic and enrollment will increase as price comes down. But a family's decision to enroll their child in a Jewish day school cannot be reduced to an elasticity of demand or price curve. As Litman says, it's all about perceived value. And perceived value is likely to be impacted by variables more important than price—quality, location, competition etc.

While the new, needs-based tuition models such as income caps and flexible or indexed tuition offer much promise, we must wait to see whether they will succeed in getting more middle income families to try a Jewish day school. One thing seems virtually certain. Across the board, non-needs based tuition cuts do very little to drive enrollment. In other words, lowering tuition alone won't make them come. ■



Whatever Happened to Hebrew Day Schools?

■ by **Jonathan Woocher**

Since the end of the summer, I've had the opportunity to participate in two day-long meetings dealing with Hebrew in day schools and other parts of our Jewish educational system. Both meetings, though forward-looking in their focus, reflected what seemed to be a shared sense among participants that Hebrew language learning and teaching—despite some notable bright spots—generally faces an uphill struggle in our schools. The problem is not one of lack of good curricula or pedagogic knowledge, though there certainly are concerns about finding and preparing an adequate supply of capable teachers. Rather, again and again, participants in the conversations pointed to a "crisis of confidence and commitment": the lack of a clear sense of purpose and growing questioning from parents, students and even school leadership as to whether the time and energy devoted to teaching Hebrew could be better spent elsewhere.

These concerns should not be casually set aside. Hebrew education is a problematic endeavor today for many reasons. At the top of the list are the multiple rationales for learning and teaching Hebrew—each of which has different implications for what "Hebrew" is taught and how. Should our goal be proficiency in contemporary Hebrew so that our students can feel competent and comfortable interacting with Israel and Israelis? Do we want students to know Hebrew so that they can read central texts of our tradition in the original (forget for the moment that the Hebrew these core texts employ in different periods and genres is itself far from uniform)? Is the goal to equip students with a vocabulary of critical, often untranslatable, terms that constitute the core value structure of Jewish life? Do we teach Hebrew so that our students can pray with greater fluency and kavannah? All of the above and more are legitimate purposes for Hebrew in our schools, but their very multiplicity can lead to confusion and difference of opinion about what to emphasize and what constitutes "success."

> Day schools need to remake the case for Hebrew to parents, students and their own leadership.

This is the second big issue that clouds the Hebrew horizon today: the sense that for all of our efforts, our achievements are modest. The Pew study among others confirmed that day school graduates on average know Hebrew better than those who have not gone to day school. Nevertheless, anecdotal evidence indicates that the number of day school graduates who are equipped to carry on daily life in Israel in Hebrew, or easily read Hebrew texts in the original, is much smaller than Hebrew educators would like. So the question naturally arises among parents and students alike: why are we spending so much time and effort to so little apparent effect?

Happily, the response among those at the meetings to this state of affairs was not to pull back from a commitment to Hebrew education. And I would argue, for all the challenges they face, day schools remain our best hope for serious Hebrew learning and teaching in North America. Summer camps and other intensive programs, early childhood immersion, study in Israel, and even supplementary education all have contributions to make. But only day schools offer the opportunity for serious Hebrew learning that extends over many months and years and that can be applied immediately to diverse arenas of activity from tefillah and text study, to the arts, to conversation in the classroom and in the hallways. This is not the time for day schools to back off from their commitment to Hebrew, but they will have to address a number of issues that go beyond which curriculum to use and how much time to spend.

First, day schools need to remake the case for Hebrew to parents, students and their own leadership. Recent research on the cognitive and behavioral benefits of second language learning and multilingualism can certainly help in this endeavor. Equally important, though, is articulating clearly the rationale for Hebrew in terms of the core values and culture of the school. This articulation will differ from school to school, but there is a sound basis for connecting Hebrew to what-

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ever vision a school holds for itself, its students and its educational process. Hebrew *is* central to Jewish wisdom, Jewish history and peoplehood, Jewish spirituality. Whatever mix of values and aspirations with regard to knowledge, skills, personal development and social responsibility a school's mission embodies, there can and ought to be a place for Hebrew in realizing these.

At the same time, schools must be realistic in defining and communicating the outcomes they can achieve, and perhaps in differentiating outcomes for different students. When expectations are unrealistic, it leads to cynicism and devaluation of the endeavor as a whole. Most students probably will not achieve Hebrew fluency in day school; they won't be able to enter directly into Israel's life and culture with ease, and they won't be able to tackle many important Hebrew texts—biblical, rabbinic, medieval and modern—unaided.

However, this does not mean that they will not be acquiring real and meaningful knowledge and skills, as well as, hopefully, an appreciation of and affection for Hebrew as both a classical and a living language. Today, there are many opportunities to extend one's Hebrew learning beyond what can be done in day school. There are summer programs, college courses, adult ulpanim and, of course, extended periods in Israel. Just as in any other academic area, day schools do not have to complete the task, but neither are they free to desist from it.

Schools must be realistic in the outcomes they can achieve. When expectations are unrealistic, it leads to cynicism and devaluation of the endeavor as a whole.

And, having said this, day schools need to believe that they can succeed. Fortunately, there is an expanding array of supports for Hebrew learning and teaching, both homegrown and from Israel. There are new academic centers, advocacy organizations, curricula and teacher training programs. There are new models, like the Hebrew charter schools, to look at and learn from. New initiatives to elevate Hebrew's visibility and prestige are in the works. As the Jewish educational landscape blossoms with new programs in so many arenas, the opportunities for Hebrew literacy to become functional and relevant will only grow. Day schools can be the engine for providing many Jews, not limited to their current students, with that modicum of Hebrew literacy that makes every other Jewish experience incomparably richer and more meaningful.

I will confess that I came to those meetings on Hebrew with some skepticism and cynicism myself. I heard no easy answers, discovered no magic bullets. But to my surprise, what I came away with was a new sense that the status quo truly can and must be changed. We need a renewal of Hebrew education in America, and we need day schools to take the lead. ■

תחרות השירה העברית

RAVSAK's Hebrew Poetry Contest

The fifth annual Hebrew Poetry Contest is underway, with students in grades K-12 penning original Hebrew poems, to be judged by a panel of esteemed Hebrew poets. If your school is interested in participating, it's not too late! Email Yael Steiner at yael@ravsak.org to receive a Hebrew poetry curriculum and contest information. Schools have until February 25, 2015, to submit their poems.

In a faraway land
That is close to our own,
There is a world of dreams
With a reality unknown.

באֶרֶץ רְחוֹקָה
שֶׁלְּעֻמַּת הַבַּה נִצְמֶדֶת
יֵשׁ אֶרֶץ חֲלוֹמוֹת
עִם מְצִיאוּת קְצָת מְעוּוֶתֶת.

— Naama Gotesdyner
Yavneh Day School, Los Gatos, CA

To learn more about the Hebrew Poetry Contest and to register your school, please visit www.ravsak.org/programs.

For more information, please contact Yael Steiner, Student Programs Coordinator.
Email: yael@ravsak.org
Phone: 212-665-1320

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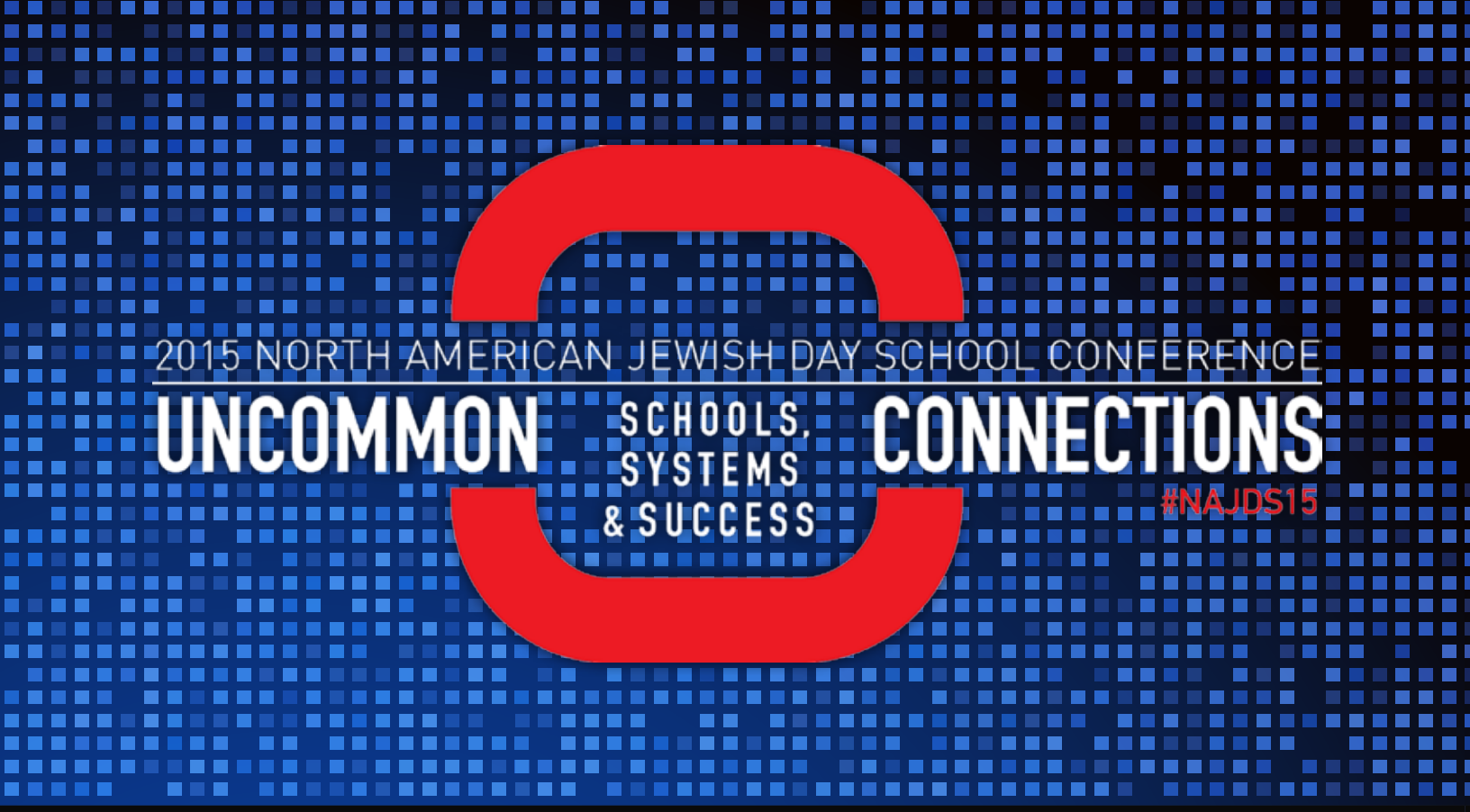

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Fundraising Campaigns in Our

A generous person will prosper; he who refreshes others will be refreshed.

Proverbs 11:25

As the articles in this issue demonstrate, successful fundraisers find ways to build a relationship with every donor and to cultivate their understanding of and belief in the school's mission. Fundraising campaigns grow out of this relational work; they offer fun, meaningful, creative vehicles for people to give of themselves and to give for a cause. As the examples collected here reveal, successful campaigns are built on knowledge of local donors and foster a bond of partnership between funders and the school.

Alumni Family Giving: Building a Bright Future by Connecting to our Past

By Steven D. Levy, Treasurer, and Naomi Bacharach, Director of Marketing and Development, Gottesman RTW Academy, Randolph, New Jersey

Since its first graduating class in 1974, the Gottesman RTW Academy, formerly the Hebrew Academy of Morris County, located in Randolph, New Jersey, has had almost 500 eighth graders move up to high school and beyond. The impact that this school has had on those students' lives and perhaps, just as importantly, on their families, is immeasurable.

Last year, the Gottesman Academy had its most successful Shomrei Torah campaign, our annual fundraiser, ever, raising $231,000. And to make this even more remarkable, it was a year when the school launched its $23+ million capital and endowment campaign, entitled Our Future Together. Of course, the school went to its usual supporters, current parents, for support, but its success is really due to the support it receives from its alumni families. What better way to honor the place you used to call home than to give something *back*?

These alumni families show how much they valued their experience at this community day school with their dollars. And this is well

after the time that their children graduated. According to Naomi Bacharach, director of marketing and development, alumni families represent 35% of the donors and 54% of the total funds raised in last year's Shomrei Torah campaign. For the capital and endowment campaign, alumni families are responsible for 38% of the donors and 88% of the donations and commitments to date.

Without counting the amazingly generous $15 million challenge gift from the Gottesman family that led to the school's renaming, alumni families still represent more than 58% of the gift commitments to the campaign. Another measure of the school's success with maintaining positive relationships with its prior families is that almost all of its past board presidents have committed to either a capital or endowment gift in the past five years. Leadership at the school works hard to connect, inspire and maintain friendships with as many alumni families as possible.

Merle Blackman, mother of a Gottesman alumnus, said, "The returns that Rich and I have received from the investment we have made in our children's education at Gottesman far outweigh any returns that can be measured in monetary terms. Our kids have grown into mature, independent and grounded young adults. We believe that their many years spent at Gottesman had a lot to do with this. Although now in college, they remain connected to the Gottesman community as we do. The friendships that our family has formed at the school will last a lifetime."

This type of support does not happen by accident. In fact, the financial support from alumni families has been growing steadily over the past decade. Gottesman Academy believes that multiple strategies have kept it connected to its alumni families and former students.

First and foremost, the school is dedicated to providing its students with an excellent education and an enriched Jewish experience. A community-wide effort in Greater MetroWest called The Quest for Teaching Excellence is a program funded jointly by the Gottesman Family Supporting Foundation and the MetroWest Day School council for the past four years, and has been instrumental in raising the level of academics at the school. From the school's families' viewpoint, there is nothing that maintains strong ties than knowing that their children have been rigorously prepared for their high school and college experiences.

The school strives to maintain contact with its alumni from the moment they leave the school in eighth grade. Head of School Moshe Vaknin and Dean of General Studies Cheryl Bahar regularly visit recent graduates in their high schools. In addition, the Gottesman Academy introduced a supplemental learning program for graduates called PGLP (post-graduate learning program) where each week, high school students return to campus for a two hour Judaic studies class—and some social networking. Many graduates, some going back a decade or two, are regular attendees at the Chanukah programs, annual eighth grade Purim plays and graduations. The school regularly highlights alumni as speakers at all major events, reengaging alumni families and having them inspire current parents.

From a financial development perspective, the school views its current parents as future alumni parents and begins their donor stewardship while they are still "in the house." The school has invested in donor management software and uses it effectively to track and solicit donations. Naomi Bacharach maintains that another contributing factor is the school's excellent relationship with its alumni families and the practice of bringing alumni parents onto its board of trustees. There are currently nine alumni parents actively serving the school's primary governing body. These former parents are representative of the long-term commitment that most families have to sustaining this very important central Jewish institution in Morris County. With its Our Future Together campaign and a new state-of-the-art facility opening up in September 2015, the school expects to be playing this role for the next 50 years. ■

100 Holes of Golf Marathon

By Laura Leventhal, Director of Institutional Advancement, Agnon School, Beachwood, Ohio

We're an EC-8th grade community day school with about 350 students. We held a traditional golf tournament for 10 years and used the proceeds to endow a $250,000 scholarship fund. Over time, the expenses of the tournament escalated and the number of golfers dropped. We discontinued the tournament five years ago. Two years ago we went to a 100 hole format. Here's how to set one up.

1) **Reserve a course, public or private, on a day the course is not in use.** For us, this is a great end of the school year event. (Our golf course fee is $4,000.)

The contract allows us to bring in food (needs to be kosher) for a light breakfast and lunch. The golf course provides water and Gatorade at every other hole, which we altered to be coolers on the back of each cart. At lunch break everyone turns in their cart and gets a new one. Important: carts may otherwise run out of power.

2) **Recruit golfers. For the first year, aim for 6-8 golfers.** The idea is to have a few golfers so that they can move quickly. The second year we had 11 golfers. We expect to have 14 this year, probably close to the limit. The first year, 6 of 7 golfers finished the entire 100 holes. Golfers agree to solicit sponsors per hold and commit to raising a minimum of $1,000.

The goal: golfers who move in different social circles and different business venues. Most donors chose to sponsor $.50 per hole, $1 or $2 per hole; some chose much more. Populate the page with preset amounts and leave space for "other."

3) **Clarify rules so you can share them with golfers.**

Fundraising Campaigns in Our

Understanding the rules makes it easier to recruit golfers. Normal rules of golf are abbreviated: three feet of the hole counts as "in"; seven strokes max per hole. That dramatically speeds up play!

4) Set up a web page and have golfers customize their page. Then encourage them to send the page to their entire address book. We started fundraising six weeks before the event, and encouraged the golfers to send out a personal note/line every other week. As a school, we used Facebook to promote the event, congratulated golfers when they reached milestones (the first to raise $1,000, the first to have 50 sponsors, etc.).

5) Encourage golfers to have a friend "caddy," drive the cart. The person is very helpful for spotting balls. And...it gets lonesome!

6) Food is minimal. Bananas, orange juice and coffee is all golfers want in the morning before hitting the links. We provide bagels and a schmear, but most do not eat.

7) We had goodie bags for each golfer. We used shoe bags that a sponsor paid for, filled with individual containers of aspirin, sun screen, bug spray (dollar size available at Target or other mass merchant), a bag of 36 golf balls, gum, mints, and some protein or granola bars. We also had golf towels printed, and used the extra towels to give to sponsors.

8) Sponsors were on the webpage at $250, $500 and $1,000. For $250 a person became hole sponsor: his or her name was put on a golf sign by the tee-off. $500 made someone a beverage cart sponsor, and $1,000 was for an event sponsor. All sponsor names were on the thank-you notes.

9) We took pictures during the event and sent every donor a thank-you note with a picture of the golfers after the outing.

10) Our golfers have included 8th graders, board members, grandparents and community members.

Total expense, including breakfast, lunch, golf signs (purchased the first year and then reused), towels and everything for the goodie bags, is less than $5,000. Most income is from online donations; the results are immediate and easy to monitor.

No dinner after the outing; golfers are tired! We had some prizes (donated) for 1st to finish, low score overall, and most number of pars.

Schedule day of event:

6:45 AM meet at golf club; continental breakfast available.

7:10 AM carts pull away for 7:15 shotgun start

11:30-12:00 break for **45 minute lunch break**. Golfers come in whenever they want, depending on where they are on the course. Switch carts, restock cold water or drinks, and return to the course.

The first golfers finished around 5 pm; at 6 we had 3 golfers left on the course; we asked everyone to come in no later than 6:30.

The second year, with 11 golfers, we netted $35,000. It was not a lot of staff time, and we garnered a lot of publicity from news stations because of the novelty of it. We used a high school alum to help with the technology as part of a senior project.

For more information, contact Laura Leventhal at 216-464-4055 ext. 124 or Lleventhal@agnon.org. ■

The Integrated Ask

By Angie Lieber, Development Director, Hannah Senesh Community Day School, Brooklyn, New York

This time of year is annual giving season. By now, schools have sent out their annual appeal letters and are starting telethons, social networking campaigns, email campaigns, and even videos campaigns asking parents, grandparents, alumni, and community members to give. Pitches may be different: Give to the Scholarship Fund, Help Buy iPads for Each Student, or Support Advancement and Excellence. But in the end, annual fundraising is an effort to help schools fill the annual budgetary gap between tuition and the cost of running the school.

In order to make sure we provide different giving opportunities to donors with different giving desires, development offices also run auctions and galas. Also, the school, either through the development office or the parents association, might sell Hanukkah candles, greeting cards, or Pesach candy. But are we really providing more giving opportunities? Are we maybe just asking too often and exhausting our donor base?

At Senesh, we have had great success with integrated asks of our major donors. Most donors don't want to be asked throughout the year, or even every year, but want to make one gift and ask that the school decide how to distribute the recognition. Why not offer the same opportunity to those donors with whom you are not having one-on-one asks?

Last year we offered a one-click option for annual giving. For $1,000, donors who chose this received two tickets to the gala

and a free journal ad, and a listing in the annual report at the $600 and up annual giving level. This year, we are offering a second integrated giving option: for a gift of $1,500, $1,000 goes to the annual campaign and $500 to the gala. In return, the donor receives two tickets, a slightly larger ad, and a free taxi to and from the gala.

This may feel very transactional, and in the world of relationship fundraising we prefer not to rely on a consumer model. Nevertheless, many donors need to know that their donation is recognized through a gift in return. This makes particular sense for middle income families who want to participate in all aspects of giving, but don't have the time or the mind space to deal with multiple asks.

We have experienced fantastic success with this fundraising model, and look forward to being able to provide more integrated giving opportunities to Senesh donors. There is no doubt that as fundraising becomes so much more important to support the increased cost of running a school, annual giving opportunities need to be creative and easy on the end user. ■

Feasability Study: Key to a Successful Campaign

By Lynn Raviv, Director of Development, N. E. Miles Jewish Day School, Birmingham, Alabama

If Rip Van Winkle were to wake up in a number of our schools today, he would recognize everything. This is how we felt four years ago. We knew that we had to "catch up." And along came a new head of school, who wanted Rip Van Winkle to wake up in our school and not know where he was! She began to transform our learning community. Along with strengthening our secular and Jewish education, our goal was to ensure that our students will graduate with all the tools and skills needed for their future success at their fingertips.

Our Building for the Future Campaign aimed to position our school as a most advanced academic institution. Our $3.5 million campaign was segmented in the following ways:

- 20% to make necessary repairs to our physical structure
- 30% to reconfigure the building interior and provide the hardware to accommodate educational technology that will prepare our students for the seamless transition to higher education and beyond
- 50% to increase our endowment, allowing us to provide ongoing professional development and technology upgrades while maintaining financial stability going forward

And so we began to create a campaign to provide cutting-edge technology centered in a progressive learning environment, allowing our students to master the Four Cs of forward moving pedagogy: critical thinking, creativity, communication and collaboration. It was designed to enhance our ability to

Fundraising Campaigns in Our Schools

adhere to the core mission of our school: to provide a comprehensive, values-based Jewish education with the highest academic standards.

This quest began with a feasibility study, which was critical to our understanding of the capacity of Birmingham's 1200 Jewish families to support the campaign. Fortunately, we had the support of our Birmingham Jewish Federation professionals to carry out this study. Twenty families were interviewed. From this process, we were able to project a financial schematic that would serve our day school in a healthy campaign.

Early on in the feasibility process, we were able to identify a donor who would leave a $1M endowment gift contingent on the rest of the campaign raising $2M in current or deferred commitments. This was an inspiring commitment that gave us the energy and excitement to look ahead. In addition, even though potential donors in the feasibility study knew we were only having a feasibility study and we were not actually soliciting them for money, we asked them to tell us openly what they could consider if the campaign met the goals: a top-notch school that is financially viable and enrolls more students. From these interviews, we were able to get enough information to project a successful $3.5M campaign.

A feasibility study such as this is critical for many reasons. Yes, we were able to prognosticate a successful campaign. In addition, we were able to gain a lot of information about their perceptions of our school, about what donors expected from this campaign, how passionate they were about the day school and seeing it succeed, and how committed they were in providing Jewish education for young people in our community. They saw the young people as future leaders. This study gave us a road map for this campaign's journey.

We were able to use the information from the feasibility study to segment the campaign by creating various marketing opportunities for different groups of our potential donors. For this work, we engaged a local marketing professional. Our marketing took the form of parlor meetings, luncheons, face-to-face solicitations, brochures, a video (stills from which illustrate this article), and mass mailings, one for the ask and others as follow up reminders as well as phone telethon. Important, include in our information, was specific information of ways to give and we encouraged pledges that could be paid out over five years.

We began with the feasibility studies in 2012 and launched the campaign in 2013-14. It is ongoing and we are still making face-to-face solicitations and follow-ups. To date we have raised $1,647,300 in foundation expectancies, have created new three new cash funds in our endowment and have raised $1,573,188 in current funds.

Our students entered an entirely renovated school this year. There is a lot of excitement at the NEMJDS, but most importantly, our academic program now has the space and tools to meet the needs of our teachers and students. And our newly designed Innovative Learning Center, which is staffed by our new Innovative Learning Specialist, is a hub of transformational activity all day. ■

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Funding Innovation

■ by **Todd J. Sukol**

Articles in this section create in effect a dialogue between the perspectives of funders on schools and school leaders on funders. Here, Sokol conveys his considerations as a foundation head in creating a program that seeks to spur day school innovation.

It seems in the world of philanthropy every five years or so a new buzzword or phrase overtakes charitable foundations and other institutional and private funders. During the span of my career we've been through efficiency, effectiveness, strategic philanthropy, venture philanthropy, and impact, to name a few. As these concepts build on each other they travel in turn through the nonprofit and philanthropic sector as the magic bullet of the day. As in many fields, trends in philanthropy tend to follow a similar trajectory from insightful and powerful to hackneyed and meaningless. The tragedy of this is that we often underutilize the philanthropic sector's best ideas in practice even as we overuse them in rhetoric.

Where is the boundary between the short-sighted appeal of the "shiny new toy" and the opportunity to create transformative new models for day school education?

This brings us to the sector's latest darling, innovation. As with trends that have gone before, there is both meaningless noise and tremendous value embedded in the notion of innovation as a tool. As an educator, head of school or development director, what are you to make of funders and would be funders who put out a public call for "innovation"? Just what do they want? Is this an additional activity to add to your already overtaxed schedule, or could this be something game-changing and essential to core programming? Where is the boundary between the short-sighted appeal of the "shiny new toy" and the opportunity to create genuinely transformative new strategies and models for day school education?

The invitation to innovation should be viewed as an opportunity to challenge assumptions about how we do what we do. I believe deeply in the human capacity to create new solutions to old problems. And I believe with equal conviction in the power of the nonprofit sector as a collaborative vehicle and competitive venue for the creation of public good through a diversity of programs and initiatives that neither government nor the commercial sector would ever generate. It is worth taking a moment to recognize and appreciate that your school, as a voluntary private enterprise creating communal value (public good), is part of the broader nonprofit and philanthropic sector in America.

Allow—even if just for a moment—the pressures of the day to slide into the background and consider your school in this context. Even with all the challenges, we are blessed with extraordinary freedom to organize our infrastructure, curriculum, operations and governance any way we see fit. With this freedom comes the responsibility to ask ourselves if we are deploying our precious resources most effectively, delivering maximum return on the investment of time, money, talent and effort we put into our work.

As a foundation executive, I am always stunned by how few organizations can give a clear, consistent answer to the simple question, "What are you trying to accomplish?" Common sense dictates that one is unlikely to hit a target he or she cannot identify. But even the best nonprofits are sometimes guilty of falling into a sort of autopilot mode, slogging through the days unthinkingly, struggling to impress funders, meet budgets and keep going.

Todd J. Sukol is executive director of the Mayberg Family Foundation, and previously served as president of Do More Mission and executive director of the Koby Mandell Foundation. todd@mayberg.org

An occupational hazard in education and other human services is losing touch with the highest purpose of our work. Innovation offers a tool for combatting this institutional entropy. When we detach from "we've always done it this way" thinking and rigorously search for transformative approaches to our work, the discussion invariably winds its way around to defining what ultimate success in our work would look like. By forcing us to think about *how*, innovation brings us into the realms of *what* and *why*. Even if this were all innovation accomplished, it would be worthwhile.

Innovation is not only counter to the flow of organizational life, it is downright risky business. For schools, so dependent on trust expressed through enrollment and contributions, innovation means deviating from communal expectations. For funders, it means investing money in experimental approaches that are equally likely to produce disappointment as the breakthrough results we all hope for. In the age of outcomes data, many funders do not have the patience for experimentation that innovation demands. Organizations typically grow increasingly risk-averse as they age, often perilously oblivious to the invisible, larger risks of organizational inertia. In the nonprofit sector, therefore, truly disruptive innovation as prescribed by author and innovation guru Clayton Christensen (borrowing from Schumpeter's economic concept of "creative destruction") usually requires a strong external catalyst.

In our foundation's work with the Jewish Education Innovation Challenge (JEIC), our aim is to stimulate an honest resumption of the creative experimentation that characterized American Jewish day school education in its early years. The objective of innovation is not creativity for its own sake, but rather a clarification of goals and a rethinking of strategies for building up future generations who are healthy, inspired, informed, practicing Jews with different needs from the previous generation. Jewish day schools accomplish much, but we need educators and funders alike to engage the hardest questions. Are we really satisfied with what our schools accomplish today? How would schools have to change in order to help our students connect exponentially more deeply to God, to their own inner potential and to the Jewish people? What reconfiguration might create more profound experiences for our kids? What kind of schools would attract Jews who currently do not send their kids to day schools? I do not claim to know the answers to these questions, but I do know I want our most talented educators actively grappling with these issues on a continuous basis, developing ever better models for the schools of the future.

During the past two years JEIC has funded and researched four new models for Jewish education created by talented educators, enabling them to field-test their ideas in the schools in which they work. We also research the critical success factors and shortcomings of those models and plan on publicly sharing those outcomes for others to build on our grantees' experimentation. You can find out more about these projects as well as JEIC grant opportunities for your school at www.jewishchallenge.org. The challenge is open to any Jewish school with a middle school or high school, regardless of denomination.

The Jewish Education Innovation Challenge (JEIC) *is a grantmaking initiative designed to disrupt complacency and encourage innovation in Jewish day school education. By rewarding and collaborating with talented innovators, JEIC seeks to improve the way Jewish values, literacy, practice and belief are transferred to the next generation. The project's ultimate success will be the creation and implementation of revolutionary, practical educational models that are sustainable, accountable and scalable.*

The Mayberg Family Foundation *is a grantmaking family foundation with a high impact, entrepreneurial approach to philanthropy. Trustees Louis and Manette Mayberg serve on a variety of boards and are deeply involved in many issues and initiatives impacting how future generations will sustain Jewish values, literacy, practice and belief. Giving priorities include Jewish outreach and Jewish education.*

When I was a nonprofit executive director, I came to understand that funders who believed in our work needed our execution skills as much as we needed their money. As a foundation executive I see this reality even more keenly. Without forward-thinking organizations and initiatives to fund, philanthropists can only dream of improving the world. JEIC, along with a variety of other creative funding initiatives that have cropped up around Jewish education, is challenging the field to pull back and take a fresh look at itself.

Creative funders and talented educators must work together, asking the toughest questions, rethinking objectives, and rejuvenating or recreating day schools.

This should be received as an invitation to forge a partnership. Creative funders and talented educators must work together, asking the toughest questions, rethinking objectives, and rejuvenating or recreating institutions that, together with parents, will guide future generations of Jews into the beauty and fulfillment of Jewish living. When we do, we will have harnessed innovation as a powerful tool, not just the latest in a string of engaging ideas from the philanthropic sector. ■

Thinking Differently About Day School Funding and Priorities

■ by **Marc Baker**

Baker urges funders to help create conditions that would enable leaders to focus on what matters: the school's mission and education. This task requires moving away from a scarcity mentality toward a powerful shared vision of day school success.

The Challenge

In healthy, stable organizations with strong leadership and governance, a short-term resource challenge and even a crisis can generate innovative, adaptive thinking and great leadership. However, a steady state of financial disequilibrium can lull leaders into a vicious cycle of short-term thinking and what I would call "make-sure-we're-still-around-tomorrow management." When school leaders are constantly worried about balancing budgets, declining enrollment, sustaining programs, and meeting our fundraising goals, who has time to think strategically, creatively, adaptively?

How often do we make short-term decisions in the name of saving small amounts of money that actually lead to a less effective utilization of our overall resources and thus a weakening of our institution? How often have many of us gotten together with colleagues who should be our thought partners, with whom we should be dreaming about the next 10-20 years of education and our schools, only to spend most of our time addressing the question, "How are your numbers?" Might we Jewish day school leaders spend too much time managing the present and lamenting the past, and not enough time shaping a vision for the future?

Might we Jewish day school leaders spend too much time managing the present and lamenting the past, and not enough time shaping a vision for the future?

I think many of us realize that we need to shift from an obsession with "sustainability" (as individual schools and as a field) to deeper conversation about sustainability *for what*. As PEJE taught us in its early years, mission, vision, leadership and governance are the lynchpins of sustainable schools. I applaud RAVSAK for stimulating more conversation in the field about mission and vision. At the same time, I worry that we will not be able to address a lack of missionary, visionary leadership without addressing underlying ways that our scarcity of resources and the psychology that comes along with that scarcity are undermining the quality of leadership and management in our schools.

Contributing Factors

For resource-rich independent schools, large endowments, robust annual campaigns, and waiting lists of full-pay students give leaders breathing room, even as they too struggle to balance annual budgets. We know that much attention is being paid to addressing these aspects of Jewish day school sustain-

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ability. But I believe that the mindsets that heads, boards and even foundations bring to day school funding and to resource challenges also exacerbate these challenges.

I recall, for example, sitting at a board meeting when we proposed increasing our budget allocation to professional development and leadership development. After a presentation of Independent School Management's "Stability Markers," which include executive leadership, allocated resources for faculty development, and a growth-oriented professional culture, one board member objected to investing in professional development on the grounds that it was "rearranging deck chairs on the Titanic." Consider this mentality: yes, everyone knows that investments in human capital are the best, if not the only, way to secure the long-term stability of a school; however, the scarcity mentality that dominates so many budget conversations leads people to prioritize items that appear more urgent and important over items that will strengthen a school's core as well as its adaptability over time. (Stephen Covey's *7 Habits of Highly Effective People* describes the "scarcity mentality" vs. the "abundance mentality" and the four quadrants of time management.)

Rather than apologizing for these expenses or avoiding asking for funders to support the school's balance sheet, imagine a national "campaign for the bottom line."

Another mindset is the undervaluing of leaders' time, at least time spent on the most important activities for leaders to be engaged in, such as visioning, coaching and mentoring others, building senior teams, stewarding major donors, and inspiring all of our stakeholders about the missions of our schools. How many heads and other senior leaders spend proportionally too much of our time "in the weeds" rather than proactively shaping and mobilizing others towards the strategic vision and most important annual and multiyear priorities for our schools? I sometimes joke, sad as it is, that while Google has (or had) the 80-20 rule, granting employees 20% of their time to "do nothing" in the name of creativity, collaboration and innovation, Jewish day schools have the 120-zero rule: teachers and leaders work 120% time on the day-to-day operations of the school, leaving no time or space for the kind of reflective, creative, generative work that ultimately sustains and grows great schools.

It appears to me that the perspectives of many incredibly generous and well meaning donors as well as large philanthropies might actually make these challenges worse. How many times have we heard, "I don't want to fund your bottom line"? How many grants expect significant investments of senior management's time (often, rightfully so) without including funding to account for the value of that time? If funders' generous commitment to incentivizing innovation actually works at odds with securing the core of their operations, then this very generosity adds to a short-term funding scarcity that, paradoxically, discourages the very innovative thinking and leading that these funders are trying to support and encourage. The Bridgespan Group (*The Network Starvation Cycle*) has shown that many of these issues are endemic to nonprofits, in particular the underfunding of overhead by funders.

Breaking the Scarcity Mentality

While these suggestions are obviously not exhaustive, my hope is that they will generate conversations among heads, boards and, perhaps most importantly, funders about multiyear planning, annual budgeting decisions and especially philanthropic priorities (from the perspectives of both funders and fundraisers). These suggestions intentionally do not touch several areas—namely, recruitment and retention, annual and endowment fundraising—not because they are not important, but rather because they are already receiving a great deal of attention.

Retiring the Debt

Venture philanthropy works and can be transformative when a school's bottom line and balance sheet are stable and strong. I want to suggest, however, that for many of our schools, retiring debt, funding the bottom line, and investing in the development of human capital

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(in addition, of course, to new programs) would actually be the most transformative ways for donors to support our schools.

In 2009, a small group of anonymous donors made a historic gift to Gann Academy that paid off our $13 million debt. They didn't ask for a naming opportunity, they didn't build a building nor create a new program, not even an endowment. They made a one-time gift to arguably one of the least attractive expenses that a school has: debt. And yet, it was transformative. It allowed our school leadership to breathe. All of a sudden, instead of raising money to pay off debt service, we were given the opportunity to reimagine our financial future and to think creatively about where to reallocate those dollars. Debt, while sometimes financially prudent or at least necessary, can psychologically hang over leadership just like it hangs over individuals. By paying off debt, funders can empower leaders to dream about the future rather than live in the past, and to make vision-driven, strategic decisions with freed-up operating funds.

The most successful leaders and fundraisers are free to vision, dream and solicit support for growth and innovation *precisely because* their balance sheet, overhead and core operations are stable and supported. Heads, boards and funders should shout from the rooftops about the importance of funding and sustaining the right levels of investments in operations and overhead. Rather than apologizing for these expenses or avoiding asking for funders to support the school's balance sheet, imagine a national "campaign for the bottom line."

Innovation Funds

As important as it is to set clear goals and measure outcomes, many funders with the "logic model mindset" only want to support clear, well developed ideas that will lead to a clear set of outcomes over a clear period of time (and that are replicable across the field, scalable and ultimately sustainable without the current funders' support!). Instead, we need to recognize the importance of freeing up budgetary dollars for leaders and teachers to have the room to experiment, pilot, innovate and dream without the expectation of linear growth or success. This would be the equivalent of an R and D department or budget, in the hands of school practitioners. These funds would be designated to stimulate new thinking and new ideas with the goal of slowly changing the short-term, scarcity mindset into more of a long-term, vision-driven mindset. Heads and boards would need to know that innovation funding will be in place over a long period of time, ideally in perpetuity, so they have the confidence to innovate with the long view in mind. Imagine a national "campaign for experimentation and innovation."

Professional Development for Teachers and Leaders

Every head and board should define a minimum budget line for professional development across the school that goes far beyond support for conferences or professional development "days." Schools need to have multiyear plans for cultivating a culture of growth in their schools, which includes both reflection on and improvement of the crafts of teaching and leading, as well as collaboration and experimentations in practice and in programs. Boards need to treat these budget line items as sacred and nonnegotiable as much as they do line items about "keeping the lights on." If the electricity literally powers the operation of our facility, professional development powers the sustaining, renewal and ongoing improvement and adaptability of the people who power our schools. Imagine a national "campaign for teacher and leader renewal and growth."

Support for Leaders' Time

Related to funding professional development, schools need to tackle the 120-zero problem. While many of us could be functioning more efficiently and schools always need to examine their budgets, structures, head counts and overall performance for ways we can work and spend smarter, the most critical resource leaders and teachers have is their time. As long as this resource is scarce, leaders, teachers and schools will under-actualize their full potential. As long as heads spend too much time in the weeds, they will never raise the kind of dollars or recruit the number of students that we all believe are possible.

> What if we put a moratorium on asking the questions of numbers and enrollment, and instead asked, how is student learning in your school?

Ideally at every level of the school, but at least beginning with the head and senior management team, both summative and formative performance evaluations should focus less on "what have you accomplished" and more on "are you spending your time on the right things?" In order to hold leaders accountable for spending their time strategically, schools need to ensure that they have support and partnership around them, whether in the form of (high quality) administrative assistance or of increased human-power to share responsibility for leadership and administration.

Imagine a national "campaign for delegation and time management" aimed at creating infrastructures that enable leaders to get out of day-to-day operations and focus on their most significant strategic priorities. This of course would need to be accompanied by an aggressive professional development effort (and funding) to help leaders learn the skills of delegation and time management.

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Our Client is the Jewish Future
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Chanukkat Habayit: RAVSAK's Housewarming Reception

On Monday, September 15, RAVSAK's board of directors welcomed more than 50 day school leaders, advocates, educators and administrators to our New York City headquarters for a housewarming reception and to tour our new home.

Guests were treated to remarks from RAVSAK board chair Rebekah Farber, RAVSAK executive director Dr. Marc N. Kramer and two day school graduates, Alexander Zafran, who attended Donna Klein Jewish Academy, and Natalie Lazaroff, alumna of Solomon Schechter Day School Kellman Brown Academy and Jack M. Barrack Hebrew Academy.

RAVSAK board member Lesley Zafran with Joanne Blauer, board member at Hebrew at the Center

RAVSAK board chair Rebekah Farber

Natalie Lazaroff

Dr Mindell Seidlin and Arnee R. Winshall

Board member Lisa Breslau greets Dr. Alan Cooper of the Jewish Theological Seminary

Big Change from Small Change

■ by **Harlene W. Appelman**

Head of the Covenant Foundation, one of the biggest national supporters of Jewish education, Appelman shows how the work of a foundation is both to lead and to learn, in a feedback loop that helps funders make better choices to strengthen the field.

Over the last 20 plus years the Covenant Foundation has received thousands of inquiries about funding. When the granting scope is described, most institutions go for the largest amount for the longest period of time. Large and long seem to dominate. However, what we have found is that many organizations do much better with a smaller, short-term grant.

Consider:

Smaller grants can begin a conversation.

Smaller grants lower the risk and allow dreams to grow.

As one Covenant grantee put it, "The grant provided the incentive/ignition for us to think through the program and become more reflective. It helped us formalize the program and take it to the next level. It was mission-specific programming—a growth experience for our organization."

This is why in 2007, The Covenant Foundation introduced a new category of smaller-scale grants, Ignition Grants, that provide funding of up to $20,000 for a single year. As the name suggests, these grants are intended to spark innovation and to allow organizations to "explore new, untested ideas or determine how established practices can become even more effective." Since the stakes are not as high as in the case of larger grants, this allows an organization to test the waters.

Seth Godin, an entrepreneur and blogger who thinks about the marketing of ideas in the digital age, speaks about testing the waters this way:

Perhaps it's better to commit to wading *instead.*

When you do a small thing, when you finish it, polish it, put it into the world, you've made something. You've committed and you've finished.

And then you can do it again, but louder. And larger.

It's easy to be afraid of taking a plunge, because, after all, plunging is dangerous. And the fear is a safe way to do nothing at all.

Wading, on the other hand, gets under the radar. It gives you a chance to begin.

But large or small, what has The Covenant Foundation learned about day school funding?

- A program's success depends, first and foremost, on educators who believe that Jewish education is a positive force in changing times. These people are situated on the cutting edge of Jewish communal life, and are passionate practitioner-activists who do not accept the status quo. Their actions show that they are ready to take risks, to push back boundaries, and boldly seek out and experiment with new possibilities. The most successful projects are conceived by visionaries who translate their dreams to reality, *or* who have the wisdom to surround themselves with a capable team that can do so. Both parts of the equation, vision and implementation, are necessary.

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- Programs cannot succeed in isolation, but are dependent on networks, collaborations and community support. Basically, people support what they help to create. As a result, gathering a coalition of supporters, who reflect a variety of skills and interests to be part of the process, ensures that there are supporters as the project evolves and makes the task of recruitment far easier.

- "Today's world is amoebic, biological, organic. It's less about the perfect solution than about constant discovery" (Tamara Ingram, group executive vice president at Grey Group). Creating change in an organization or community, while challenging, can be accomplished through a combination of effort, support, and inspiration leading to constant discovery and celebrating it.

When does a gift become a burden?

This is a resounding question in the Covenant Foundation grant selection process.

We have watched in dismay while projects and initiatives about which everyone seemed enthusiastic not only fizzle but cause strife within an institution. Be careful what you wish for: receiving a grant raises the stakes on success because not only are there dollars at risk, but also the currencies of self-esteem and reputation.

The Covenant Foundation assesses not only a project's merit, viability and durability but also the ability of the environment to support it, and we ask potential grantees to do the same. Is the project mission aligned with its host institution, and does the host institution have enough resources, and the right kind, to support it?

Is there truly a partnership between the idea champion (*meshuga la-davar*) and the leadership of the institution?

Recipients, many with very limited previous experience with grant projects, not only have to be willing to learn about how to propose doable projects in a clear and concise manner, and how to articulate and craft measurable goals, but also how to administer and implement their projects in the context of ongoing institutional work, in addition to monitoring and documenting their accomplishments.

Can an organization institute a new, exciting program without exhausting the staff or diminishing the works of others? Is it possible to bring a group of the willing along and create a team that can carry on the work beyond the life of the grant, even though an entire staff or teacher body may not be ready or interested in the new work?

Regardless of the scope or breadth of a project, turbulence in the host institution inevitably stresses a project. When there are staff changes and the founding visionaries leave, projects founder; when practical implementers are unavailable, most times very promising ideas cannot get off the ground.

Programs cannot succeed in isolation, but are dependent on networks, collaborations and community support.

When all is said and done, is the risk of getting a grant worth the time, effort and the possibility of failure? As another grantee put it, "Getting a grant gave me a greater sense of purpose. It helped me understand that I wasn't acting in a vacuum. That an organization outside of my institution was endorsing my work drove home that I was doing something for the greater good for my world, a greater sense of Tikkun Olam, as opposed to 'my little olam.'"

Returning to Seth Godin once again:

Dreams fade away because we can't tolerate the short term pain necessary to get to our long term goal.

Delighting a few with an idea worth spreading is more valuable than ever before.

The tiny cost of failure is dwarfed by the huge cost of not trying. ■

An Open Letter to Jewish Philanthropists

■ by **Adam Tilove** and **Laurence Kotler Berkowitz**

Leaders of a small day school encourage national funders to see small schools as part of a larger pattern, of importance well beyond their size, as lynchpins of dozens of Jewish communities, and to find creative ways to strengthen and support them.

Since the Pew Research Center issued the results of its survey of U.S. Jews last year, most of the commentary has been downbeat, with many people worried about the rise of Jews of no religion and no denominational identity, the continued increase in intermarriage (especially among the non-Orthodox), and lackluster levels of Jewish identity, communal affiliation, and raising children as Jews. To keep a long study short, in this interpretation, things are not looking so good for the Jews in America.

In the midst of all this doom and gloom, there is another, much more positive story. This is the story of the extraordinary power of Jewish day schools to shape, strengthen and build the future of the American Jewish community. Compared to other forms of Jewish education, Jewish day schools have the greatest impact on future Jewish identity, engagement, philanthropy, support of Israel, and raising Jewish children.

> There is no logical reason why every day school is on its own in its search for financial stability, or why there is such inequality between schools in smaller and larger communities.

But day schools face serious challenges. As anyone working or volunteering in the day school field can attest, tuition revenues (almost) never cover the full cost of educating students. Budget shortfalls are made up by fundraising.

Large Jewish communities such as New York, Chicago, south Florida and Los Angeles can often successfully address these challenges because they benefit from economies of scale, where more students mean greater financial stability for day schools, and because they tend to have more access to donors with tremendous wealth.

But smaller communities struggle to maintain their day schools because they lack economies of scale and often do not have access to big donors. Many of these smaller Jewish communities are in "Meds and Eds" towns, where universities and health care systems bring in Jewish academics and professionals who want a Jewish day school education for their children (as is the case in Providence, where we live). While professors, doctors and other professionals earn solidly middle-class incomes, even they cannot often afford to pay the full ticket price for a day school education (especially if they have multiple children), and they are rarely in a position to give the kind of transformative gift that can put a small community's day school on stable financial footing.

Moreover, most multimillionaires and billionaires, who have the real power and capacity to make day schools financially sustainable in the long term, don't live in these communities anymore. Jewish federations in smaller communities, despite some continued assistance to day schools, face their own fund-

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raising challenges and other local and overseas allocation demands.

As a result, Jewish day schools in smaller, middle class communities face relentless financial pressure. They are on a never-ending treadmill, seeking to raise enough money each year to continue operating, but without any promise of long-term financial sustainability. Some such schools have already closed, and more are likely to close in the future without external support.

Without day schools, Jewish life in smaller communities will be weakened. Families committed to day school education will move away or never come in the first place. For many small communities, the inability to maintain a Jewish day school is a clear sign of a community in decline. As importantly, our national Jewish community will suffer. Small schools can create big leaders, they can strongly influence their local colleges, universities and communities, and they play a vital role in maintaining Jewish life across the United States, not just in the biggest, wealthiest communities.

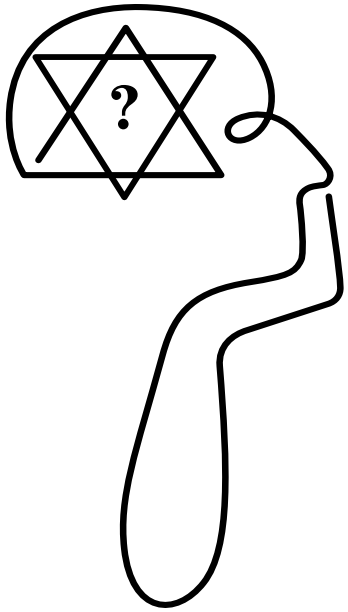
Where do we go from here? We know Jews are capable of amazing accomplishments. More than a hundred years ago, a group of committed Jews decided the Jewish people needed a sovereign state of their own. Today, Israel is a military, agricultural, technological, and economic marvel—and American Jews have played a key role in Israel's success.

Meanwhile, today the American Jewish community is far from stable. Instead, we are at a crossroads, with some major communal decisions pending. We believe that Jewish day schools are our best strategy for strengthening and sustaining Jewish life in America. And we believe—like the Zionist founders and supporters of Israel—that a radical change is needed in Jewish life.

There is no logical reason why every day school is on its own in its search for financial stability, or why there is such inequality between schools in smaller and larger communities. The fragmented way in which we support day schools is, to put it bluntly, an embarrassment to our national Jewish community.

We want to start a conversation with you, major Jewish philanthropists, about developing a national endowment to support all day schools. You are smart, thoughtful, committed people with a huge capacity to support day school education and secure the American Jewish future—not just in your local communities, but nationally in a systematic way. With your minds and resources, we feel certain that in a hundred years, our great-grandchildren will look back and admire how our generation strengthened and safeguarded American Jewish life. We invite you to react to our concerns, consider our ideas, and develop them further. Let's get the conversation started. ■

I don't know where I fit in the Jewish spectrum, so how can I be a rabbi, cantor, or a Jewish leader?



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Funding Progress

■ Interview with **Paula Gottesman,** Day School Philanthropist and Leader

A major national day school funder shares the fruit of her long experience in supporting day schools. She conveys her belief in their importance and describes the initiatives she's championed to strengthen them and collaborate with other funders.

Paula Gottesman and her husband, Jerry, believe that a thriving Jewish future requires educated Jews, and that it is a communal responsibility to provide the means for quality Jewish education. The Gottesmans are pioneers in the development of programs for middle-income affordability and day school endowments. They were among the first in the nation to provide a cap on tuition for students from middle income families at a Jewish day school, creating a ground-breaking program at the then-Hebrew Academy of Morris County in 1998.

Paula is a long-time leader of the Jewish Federation of Greater MetroWest NJ and its endowment arm, the Jewish Community Foundation of Greater MetroWest NJ. In 2007, the Gottesmans created the largest program endowment in the history of the community by endowing the middle income tuition program and becoming founding donors of the Greater MetroWest Day School Campaign and of the Herskowitz Society, a day school donor society named in memory of members of Jerry's family. The highly successful communitywide effort became the model for endowment development in communities across North America.

In other endeavors, the Gottesmans have been innovators in the field of Jewish camp, and they support many impactful Jewish education and social service programs in Israel. They endowed a position for a full-time Jewish student director at Vassar College, Paula's alma mater.

Jerry is the Chairman of the Board of Edison Properties, a diversified firm specializing in mini-storage, parking and real estate development. Paula is a retired attorney.

Why are you passionate about day school education?

We can't have a viable Jewish community without educated Jews. It's that simple. For a long time in this country, we relied on immigrant families from Europe to be the educated leaders of the Jewish community. We no longer have that luxury. Today, we need to develop our own educated, committed Jews in order for the community to continue to grow and thrive in a meaningful way.

When you think about the system of a day school, what role do you see a funder playing?

Jewish community leaders always talk about how we are a "community": we take care of each other, we take care of our elderly, we take care of our children. Those are nice words, but in some ways empty words when it comes to educating children. The burden of the education is left largely to the parents. I think the community should bear the responsibility. Just as people pay taxes for public schools—and no one would say we shouldn't do that—the Jewish community should tax itself for the education of our children. Our collective future should be the responsibility of the collective community.

Rendering of new facility for Gottesman RTW Academy, scheduled to open September 2015

Tell us about your relationship specifically with the school now named Gottesman RTW Academy, formerly known as Hebrew Academy of Morris County—why you believe in that school and how your relationship with it has developed over the years.

When we moved to this area about 40 years ago, two of our children went to the school. I got involved because the kids liked it and we were a community. The parents did a lot of bonding just as our children did. It's the only Jewish day school in our county, and we believe a strong day school is important to maintaining quality Jewish life in the area. When we realized that the school needed a new facility to meet the needs of today's education and for the future, we were happy to work with the school and its leaders and other families to make that happen.

The Jewish community should tax itself for the education of the children. Our collective future should be the responsibility of the collective community.

You and your husband have been ahead of the curve on two major issues that have become common concerns at Jewish day schools across the nation: middle income affordability and endowment development. Tell us briefly how you became aware of these challenges and the approaches you took to address them.

Affordability has been a concern of mine for a long time. In the late 1990s, I understood that middle income families could not afford to send their children to day school. The day schools had scholarships for families who couldn't afford to pay much, and the wealthy could of course afford to pay full tuition. There was a big group in the middle that was not "needy," but day school education was just not within their budgets. These were families, making about $75,000 to $100,000 in salaries, but tuition for several children was too much of a burden. We knew one committed Jewish family with three children and we asked the father why the children were not in day school. He said, "I make too much to get a scholarship, but not enough make it affordable and provide a nice life for my family." At the time, my husband and I were discussing important needs that we could help support with our foundation. One of our daughters said, "You care about Jewish day schools. Why don't you want to do something about Jewish education?" It was that simple.

So, we went to the school (then the Hebrew Academy of Morris County) and asked if they wanted to set up a program to help middle income families. We asked what families would be able to pay comfortably and what they would need. We let the school set the parameters of the program. So, in 1998, when it began, tuition

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was about $7,500. The school asked middle income parents to pay $5000 per child a year, and we provided the difference. We called it "subvention." Unlike with scholarships, we did not ask for detailed financial information. We didn't want to put any stigma on those getting the subvention, and we told them that we were relying on an honor system. At the time, middle income was defined as a maximum of $120,000 a year. Every few years, as tuition rises, the school adjusts the guidelines of the middle income program. Today, families making as much as $250,000 who have several children in the school are considered "middle income."

For many years, the school would renew its request for the middle income program. They told us how important it was to the families and that the families needed a sense of assurance that the program would continue. Jerry suggested that we should create an endowment, so the school, and the families, wouldn't need to worry about it from one year to the next. That led us to endow our program and to begin an endowment campaign for the day schools in our community.

How did you decide to create a communitywide initiative to support multiple day schools? What convinced other funders to join in this project?

I think all the schools are doing a good job and striving toward the same goal, which is educating Jewish children. This helps the whole community.

We knew that every college has an endowment, and every prep school has an endowment. Jews who are supposed to be so good at fundraising were asleep at the helm. Then Kim Hirsh, who had been development director at the Hebrew Academy, was hired by the Jewish Community Foundation of our (Greater MetroWest) Federation, and we worked with her to start an endowment program for all the schools. We were going to have a matching program for donations to one fund for three schools. We created a one-for-one match, presented it to the three schools and their lead donors, and got almost no takers. They all supported Jewish education, but wanted to support their own schools. So, Kim created a solution: people can give to the community fund OR for an endowment for a particular school. Then the money started coming in. There was a higher match for the community endowment, which we wanted to build up, and a slightly lower one for the individual school funds, but people still preferred to give to their individual schools. At the end of the day, as long as people were giving to endowments for day school education, that is what mattered. Every gift is an investment in day schools and our Jewish future.

One of the things notable about the project was that it generated a conversation about academic excellence.

We live in an area with excellent public and private schools. Our Jewish day schools need to compete with the best. So we set out to make really quality day schools even better through investing in science and technology, in Israel programs, and, most importantly, investing in teachers. Teachers are the heart of quality education. We retained Penney Riegelman, a former head of school from one of the top private independent schools in our region, and she worked with our Jewish day schools to create a high-end professional development program for every teacher, Judaic and secular. We added "deans of the faculty" in each school to oversee professional development and help mentor and constantly improve teaching. The teachers love the program, and it has created so much energy and dynamism in the classrooms. Parents are definitely noticing, and retention rates have improved.

Let's take a step back and think about the place of day schools in American Jewish life. Do you believe that day schools receive the recognition and support they need and deserve from the Jewish community?

Acceptance today is much greater than it had been in the past. When we first sent our children to a day school, friends would ask me, "Why are you sending kids to day school? Are the public schools so terrible?" We don't hear that so much anymore. Day schools are much more accepted today as a quality option for Jewish families.

What have you learned on the local level that can be transferred more broadly on the national level?

Until very recently, Jewish day schools never even dreamed of having endowments. This is shocking when we realize that private independent schools have been building endowments for generations. Day schools have just been living from hand to mouth. They say, "Well, we can't think about that because we have to pay for operations and for fixing the roof." But you can't hold off the endowment campaign because you have an annual campaign. Day schools need both. You need to explain that you want to fund today and ensure the school's viability for the long haul. Private secular schools have been doing this for a long, long time, and Jewish day schools can, too. Just think of what a different place we would be in today if day schools had been doing this for 50 years already.

What advice do you have for funders as they invest their time and money in support of Jewish day schools?

I think funders should meet with the school's leaders and ask what they think would be most beneficial to the school. I don't think you should go to a school and tell them, I want to give you a million dollars for X or Y. Ask the school what they think will be the greatest asset enhancer for the school. Whether they tell you it's lowering tuition, building a new gym, or constructing a beit midrash, I don't think funders should try to redirect the school. I also think funders need to understand that to really

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Sulam 2.0: Preparing Day School Boards for 21st Century Leadership

Why does 21st century learning require a different type of leadership? This is a question that has engaged the 30 participants of Sulam 2.0, a program in board development with a focus on Jewish leadership. There has been a great deal of discussion in recent years about "21st century education," the ways that both the goals and methods of education need to change radically to equip students with the skills they will need for success. The nature of board leadership is changing just as rapidly and radically, as this chart shows.

21st Century Board Leadership	Traditional Board Leadership
Expect change	Do what we have always done
Lightning-fast flow of information from multiple sources	Slow, controlled release of information from the board
Want to be instantly useful and tackle issues now	Patient to address issues
Discussions	Presentations
Collaboration and learning from each other	Board members want to be "sages on the stage"
Connected to schools over the globe	Lone institution
Risk takers	Risk-averse
Need articulated value proposition	Being a Jewish school was the recruitment incentive
Values driven	Mission driven

Sulam 2.0 represents a departure from the standard model of board training. Usually, each institution brings in a consultant to train its board in strategic planning, development or any other specific leadership skill. Sulam 2.0 brought leaders from ten schools to learn together and be the seeds of change back home. They took part in collaborative learning, through in-person discussions at seminars and distance learning with the help of webinars and study packs. Participants engaged in a reshet for the schools to open communication between themselves and leverage resources from all the schools. Presenters constantly tried to home in on useful skills for addressing current issues, using multiple modalities of learning. The program itself modeled the values that were espoused: collaboration, risk-taking, evaluation, reflection, constant and consistent learning.

The program's curriculum covered the nuts and bolts of good governance along with the critical importance of focusing on the "Jewish" in day schools. Participants learned about how running a school is, and is not, like running a business; they acquired the 4 Cs of a healthy board-head relationship: clarify, commit, communicate, consent; they studied best practices in governance and financial stewardship.

They developed their leadership skills such as effective listening, self-reflection and assessment, and explored ways to effect and manage change. Simultaneously, they studied how day schools transmit Jewish values and identity, the importance of developing students' knowledge of and connection to Jewish history, and the implications of betzelem Elokim, the image of God, for anchoring notions of individualism, diversity and tolerance. Over the course of the program, mentors assisted each school in processing and implementing the skills, strategies and perspectives developed.

The program's impact might be gauged from some of the questions and resolutions that participants themselves have formulated to guide their work:

How do we show that we respect people where they are?

How do we show that while practices might be different, our Jewish values are the same?

What is the portrait of our star graduate?

How do we transform seemingly difficult questions into easier problems?

At the start of each board meeting, instead of a dvar torah, we will ask a Judaic question for all board members' interaction.

How do we add Jewish teachings in our discussions around issues facing the board, such as differentiation, bullying, conduct and inclusion.

How can we better understand needs and support our head of school?

The final months of our pilot year will bring virtual studies on mentorship and the board's role in fundraising. The program culminates at the North American Jewish Day School Conference in Philadelphia in March. We look forward to sharing further discoveries from the participants as the program draws to a close. ■

The Path Toward Jewish Day School Sustainability: Lessons Learned

■ by **Stephanie Bash-Soudry**

The author, a development director of school with notable success in fundraising, recommends a host of steps that other schools can take to find and cultivate donors and enhance their philanthropic revenue.

These are critical times for the sustainability of Jewish day schools across North America. Many are struggling with changing demographics, declining enrollment, increased need for financial aid, and budgetary strain.

At Golda Och Academy in West Orange, New Jersey, we have faced these issues head on and have made great progress in overcoming them through many different initiatives, primarily a major capital and endowment campaign. The campaign is a story of successful partnerships and teamwork on different levels. We have many lessons to share through this exciting journey. The education of young Jews for our Jewish future is too important for day schools alone to pursue; we must mobilize diverse partnerships in order to succeed.

Federations and foundations are in a unique position to help day schools identify potential mission partners among donor-advised fund holders and other community donors.

Community Partnerships: Day Schools and Jewish Federations and Foundations

During the 2008 economic crisis, many schools experienced a significantly increased need for financial aid and serious concerns about student retention. Golda Ach Academy shared this painful experience. However, our school was fortunate to be on a positive trajectory because of a transformational partnership with the Jewish Community Foundation of Greater MetroWest, which launched a new MetroWest Day School Excellence and Affordability Initiative in 2007. A major family foundation, whose priority was middle income affordability, had the vision and great generosity to offer a match pool to the three Jewish day schools in our community for endowment fundraising (see previous article). We were also fortunate to have a visionary fundraising professional who made it her mission to help these three day schools to raise endowment funds for academic excellence and affordability, and a foundation executive director who generously gave of his time to provide our school leaders with training and technical support in planned giving.

Because of this community partnership approach, a team led by one of our past school board chairs and alumni was able to ask Daniel Och, a classmate and former student of our school, for a transformational gift that renamed our school in memory of his mother Golda Och. This gift, a challenge gift, inspired many others to follow.

One lesson here is that Jewish day schools should reach out to their local community federations and foundations to build relationships and put support of day schools on the community agenda. *Support of Jewish day school education must be recognized as a community priority, not just the responsibility of Jewish day school parents.* Day school leaders should serve on federation boards and other committees, support the federation campaign and be a visible presence at events like Super Sunday. Federations and foundations are in a unique position to help day schools identify potential mission partners among donor-advised fund holders and other community donors. A partnership between federations and day schools can raise the bar on a school's capacity to pursue endowment and major gifts fundraising.

Stephanie Bash-Soudry has been the director of development and alumni relations at Golda Och Academy since 2000, as well as the proud parent of three GOA students. sbashsoudry@goldaochacademy.org

The support of Jewish day schools is a win-win scenario for local Jewish communities who will benefit and flourish when our dynamic and committed Jewish day school graduates become active on campus, at their synagogues, in Jewish and non-Jewish nonprofits, and become future federation and agency leaders. In a recent AVI CHAI study on leadership among young Jews, entitled "Generation of Change: How Leaders in their Twenties and Thirties are Reshaping American Jewish Life," Jack Wertheimer found that "Over one-third of younger leaders attended day schools, a figure that rises to 40 percent for the young non-establishment leaders." Clearly, Jewish day school alumni are making an impact.

Leadership and Fundraising: the Board and Head of School

One of the most influential factors to successful Jewish day school fundraising are the roles of the board chair and CEO in supporting fundraising. When a board chair promotes school giving and through personal example makes the school his or her number one philanthropic priority and steps up to make a leadership gift for whatever campaign your school is working on, it will be transformational. The rest of the board generally follows. This serves to inspire other donors and community prospects and generally will lead to a culture of giving.

Our school has been blessed with a succession of such board chairs in recent years. Several years ago, one inspirational board chair at our school announced that she was doubling her annual campaign gift from $10,000 to $20,000 at the board's annual campaign launch. Others were inspired and the annual campaign was very successful that year. Another board chair lent her support by attending weekly meetings of the capital and endowment campaign during her entire term.

This year, our new board chair powerfully opened the first meeting of the year with a strong statement of the importance of board leadership in philanthropy. It goes without saying that every Jewish day school needs to have 100% board participation in the school's annual campaign and in other important fundraising initiatives. I have been surprised to hear about schools where the development director is not welcome at board meetings and there are no development reports as a key agenda item at every meeting. Board engagement in fundraising is a key determinant to success.

The involvement and partnership of the head of school in fundraising is also truly critical. There is a body of fundraising literature that supports the idea that organizations where the CEO is actively engaged in fundraising are more successful than those that do not. As noted in a Compass Point study, quoted in Deborah Kaplan Polivy's new book, *Donor Cultivation and the Donor Lifecycle Map*, "Those executives who are involved in the development process are more likely to be in high-performing (fundraising) organizations."

When board chairs promote school giving, make the school their number one philanthropic priority and give a leadership gift for a school's campaign, it will be transformational.

When a donor is being asked for a major stretch gift, he or she usually likes to be asked by a senior person in the organization, often the head of school or board chair, in partnership with the development director or other lay leaders who are peers. The development professional must be a conductor coordinating donor cultivation and solicitation assignments. Our head of school has been a central player in our school's fundraising programs and has personally cultivated and solicited major donors. In one instance, she built a very strong relationship with one special donor for many years which led to an unexpected game-changing bequest for our school.

The Lay Professional Partnership: Creating a Development Team

A critical function of the board chair is to appoint lay development chairs or a development committee who will work in concert with the development staff, no matter how large or small the development office. Over the last ten to fifteen years, Golda Och Academy has been fortunate to have passionate lay development chairs who have worked tirelessly to support our school. Most recently, this group has been trained in major gifts solicitation and planned giving and

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has served as a tireless outreach body since the beginning of our campaign. Our team including development chairs, board chair, head of school, development director and associate director meet weekly for two hours to review prospects, solicitations and development projects. In addition, we have relied on a committed and active group of fifty volunteer solicitors to make calls for our annual campaign.

Colleagues and the Day School Professional Team

Too often in Jewish day schools, there can be silos, where administrators in different functional areas work independently. It was a revolutionary moment when development and business office leaders at our school sat together and calculated projections of what we would need to fund a middle income affordability program for K-12 until the current cohort of kindergartners graduated. This became the data behind the solicitation of the transformational philanthropic gift that was the cornerstone of our current campaign. The CFO or business officer at a school can be

a wonderful partner in helping to determine the potential cost of fundable donor opportunities. In addition, the development and admissions departments can benefit from meeting regularly to discuss community outreach to attract new students and new parents who might have the potential to be school donors.

Why Give? Developing a Compelling Case for Giving

Why should donors support your school? This "why" forms the case for giving. We named our capital and endowment campaign effort "Building on Tradition" and gave it three priorities based on school needs and what we felt would speak to most donors. The three priorities are facilities improvement, endowment for academic excellence and endowment for affordability. A broadly defined and ambitious campaign vision can serve to mobilize and inspire donors with diverse interests to participate.

Donors as Key Mission Partners

With community support, a strong case for giving, a fundraising team that includes the development director, board chair, head of school, a trained lay development team, and other school administrators, a school can now identify prospects who are closely connected to your school and go out and ask them to serve as mission partners. It is important to look at many different school constituencies to find donors: current parents, alumni parents, alumni, grandparents and school friends. Our alumni have been particularly supportive mission partners. Donor research, the right solicitor(s), and a little chutzpah can also be instrumental in helping schools to ask donors for stretch gifts in their areas of interest that might not have been previously thought possible. In addition, the importance of donor cultivation and stewardship over many years is critical.

Our school is extremely grateful to the many donor partners who have stepped forward to make a difference to our school in our current campaign. This has been an opportunity to take donor interests and school needs and create a marriage at the highest level. Our new Dr. Lynne B. Harrison STEM Program at our upper school is funding exciting robotics, computer science, engineering and science curricular and enrichment activities for our students. The Fund for Faculty Innovation and Excellence offers competitive grants to teachers who have creative ideas to implement in the classroom. Our Arie and Eva Halpern Fund for Jewish Heritage allows us to bring in special Judaic arts programming each year to our students. Finally, our beautiful and newly renovated Wilf Lower School Campus has been made possible by a lead gift from Jane and Mark Wilf and the Wilf Family Foundation.

In addition to individual donors, it is important to develop partnerships with foundation donors. This has been a key strategy for our school in our current campaign, resulting in several major foundation gifts. Most of these leads have come from connections made through relationships of board members, donors or administrators.

Every school, both large and small, can begin to take steps forward on the path to financial sustainability. Wherever you are on this important journey...good luck! May we all go from strength to strength for all our students and for the future of the Jewish people.

Golda Och Academy, formerly Solomon Schechter Day School of Essex and Union, is a pre-K-12th grade Jewish day school affiliated with the Conservative movement and located on two campuses in West Orange. New Jersey. GOA is proud to be close to the completion of a $30M capital and endowment campaign thanks to a lead challenge gift by former student Daniel Och and his wife Jane. ■

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Jewish Court of All Time (JCAT)

Nearly 500 students at 19 day schools across North America are debating, analyzing primary sources, and exploring Jewish history, all while acting as historical figures in this year's edition of the Jewish Court of All Time.

The online simulation revolves around a trial in which Rose Hermann, a granddaughter of two passengers on the ship The MS St. Louis, seeks reparations from the United States government. She is arguing for recompense for the decision by the United States government not to offer safe harbor to the 937 passengers who were aboard the ship when it entered American waters in June of 1939. The Jewish Court of All Time has agreed to gather the great figures from across human history to hear Ms. Herrmann's case, and discuss a topic of great concern to all mankind: When must we take responsibility for the actions of others?

This year we are joined by a new university partner, Hebrew College in Boston. Dr. Deborah Skolnick Einhorn is leading a class of Jewish education graduate students, joining university students at the JTS Davidson School of Jewish Education and the University of Michigan who serve as mentors to the middle school students in the program.

Thanks to the Covenant Foundation for its generous funding of this exciting initiative, which brings together 21st century technology to enhance Jewish history education in our day schools.

Participating Schools

Abraham Joshua Heschel Day School	Northridge, CA
Addlestone Hebrew Academy	Charleston, SC
Austin Jewish Academy	Austin, TX
B'nai Shalom Day School	Greensboro, NC
Brandeis Hillel, Marin Campus	San Rafael, CA
Brandeis Hillel, San Francisco Campus	San Francisco, CA
Donna Klein Jewish Academy	Boca Raton, FL
El Paso Jewish Academy	El Paso, TX
Hillel Academy of Tampa	Tampa, FL
JCDS Boston	Boston, MA
Jewish Day School of Lehigh Valley	Allentown, PA
Jewish Day School of Metropolitan Seattle	Seattle, WA
MetroWest Jewish Day School	Framingham, MA
Ottawa Jewish Community School	Ottawa, ON
Pardes Jewish Day School	Phoenix, AZ
Portland Jewish Academy	Portland, OR
Rockwern Academy	Cincinnati, OH
Ronald C. Wornick Jewish Day School	Foster City, CA
The Emery Weiner School	Houston, TX ■

Values-Driven Philanthropy

■ by **Adina Kanefield**

Kanefield writes that the key to donor satisfaction is to help ground their philanthropy in the Jewish values that the school embodies. This perspective elevates and energizes development directors as well by keeping them focused on the purpose of their work.

As we all know, money *does* matter. Nothing could be more appropriate than the topic of the financial wherewithal of our day schools. But it is also important to focus on how to put the "matter" back into the money as we keep our eye on the bottom line. With a focus on "matter," we can increase revenue and make philanthropy more meaningful and impactful for all involved.

From a fundraising perspective, the goals we set are usually bright line markers in the school budget. However, we need to give more visibility and attention to the philosophy, thinking and meaning behind those numbers. Just as core values and Jewish text provide the underpinnings of our schools' missions, so too should those values ground our fundraising approach in order to give meaning to the work of raising money.

Grounding development work in the core values of the school and Jewish text gives meaning, strength and pride to the work of the professional.

Indeed, in many cases, the exact same core values that guide our education can also serve as a moral compass for fundraising—both for supporters and the professionals conducting the outreach. Consider the values of Am Echad or Klal Yisrael that so many of us set forth in our day school mission and value statements. The concept of one people—one community—joining together can serve not only as a guidepost for pluralism and common values in community day schools, but also as a rallying cry for everyone's participation in the fundraising of the school: everyone coming together, from different perspectives and with varying capacities, to do their part for the community.

Jewish sources provide inspiration for this message. Parashat Terumah describes the long and varied list of gifts that the Israelites were commanded to give toward the building of the Mikdash (Tabernacle): gold, silver and copper metals; yarn, linen, and goat hair; ram skins, dolphin skins, and acacia wood. Different options, varied levels of giving, each integral to the construction of the Mikdash.

The philosophy of fundraising that we fervently espouse in our school—each family making a meaningful, stretch gift for their family—acquired newfound resonance. This text gave depth and life to a mantra that has become the cornerstone of our fundraising work. We ask each family to do their part and fully participate in a way that is meaningful to them. Our approach to philanthropy is grounded in Jewish text, gives meaning to our work and to each and every gift; no matter if it is gold or yarn, each gift is important as we build support for our school.

Gifts are important, but what makes them "matter" is that "gifts shall be accepted from every person whose heart so moves him" (Exodus 25:2). In this pasuk, we see not only the concept of full family participation in a campaign as "every person" is responsi-

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ble to give something, but also the idea that people need to feel good and be "moved" to give. Gifts must have meaning to the giver.

Giving meaning, or making things matter, is the responsibility of those raising the funds. As fundraisers and leaders, we need to be sure that we are creating the opportunity for supporters to feel good about giving, not merely to expect them to give out of obligation, a sense of duty, or a history of giving. The beauty of the building of the mikdash is that everyone gives up something, gives generously, and as they do so, they come closer to God. It is a moment of kedushah for them. They feel good in the process as they bring their offerings. So, too, must we as fundraisers elevate the act of giving to a special moment. Indeed, for many young parents, day schools are the first formal giving program that they encounter. Fundraisers must be cognizant of the responsibility to make the experience meaningful and positive as parents embark on their philanthropic journey.

Not only does an abiding philosophy and a deeply rooted values-based approach to fundraising elevate the giving process for donors, it also boosts the work of advancement and development directors. Fundraising work can fall into the abyss of spreadsheets, meetings, reports and lunches, turning quickly into a numbers game that drains the energy of the professionals leading the effort. Grounding development work in the core values of the school and Jewish text gives meaning, strength and pride to the work of the professional. There are so many layers of inspiration to uncover in our Jewish core values that can serve as a mobilizing force in our outreach efforts. We need to adopt those ideals, apply them to our work and make our outreach work richer.

On the ground, we can give meaningful experiences to potential supporters in simple ways. First, we need to seek to understand the needs of our donors. Too often, we as fundraisers think about the needs of our institution—our goals and our cause—rather than taking the time to understand the wishes of our donors. Understanding the impact that potential donors seek to make is key to making the experience meaningful for them. I am not advocating a shift in institutional priorities based on the interests of a donor, but I am advocating a commitment to understanding the motivations and goals of a donor.

Once we truly appreciate what inspires that donor, we can build a relationship based on that interest and determine how that passion may fit within the context of the institution's goals. Some donors may be moved by the idea of the continuity of the Jewish people, others may be touched by the pluralistic nature of a school community, and others may be moved by a fulfilling experience as a volunteer leader. There are so many aspects to the rich life of day schools; we must relate to each donor individually and uncover their unique connection to the school as we seek to make giving more meaningful.

Second, we need to consciously remind our supporters, board members and staff colleagues that development work is not an add-on to the school, but rather another expression of the school's values.

[CONTINUED ON PAGE 80]

Gold, silver and copper metals; yarn, linen, and goat hair; ram skins, dolphin skins, and acacia wood: different options, varied levels of giving, each integral to the construction of the Mikdash.

Photo: Lisa Binkley's Fiber Art Blog, http://lisabinkley.typepad.com

Long-Term Solution to the Money Problems of Parochial Schools

Government Funding

■ by **Michael J. Broyde**

This final section explores ways that schools can work with the government both to bring in funds and to maintain their financial house. Broyde demonstrates that recent US legal rulings hold great promise for day schools to receive government funding.

Over the last fifteen years, the Supreme Court precedent has made it clear that governmental programs that fund parochial schools in the United States are constitutional. The thrust of this short piece is to note that Jewish day schools must join many other parochial schools in advocating for increased government funding of the private school system within the United States, and with such a change implemented, the basic financial situation of all Jewish schools would change dramatically and for the better. The "money" issue would go away.

The most significant recent case about this was *Zelman v. Simmons-Harris* (2002), where a group of taxpayers objected to the school voucher program in Cleveland, Ohio, which funded both private parochial and private secular education. The Supreme Court noted that for many years the Cleveland public schools had "been among the worst performing public schools in the Nation" and that the purpose of this program was to give students choices that they could actually afford for an excellent education.

Even though the program funded mostly religious schools, the Supreme Court ruled that the program did not assist religious schools in violation of the Establishment Clause for three reasons:

- The funding program was created for a valid secular purpose of increasing choice and on its face was neutral with respect to religion (in that it funded all schools of any faith).
- The funding program gave parents the right to decide where to spend the vouchers. Parents were making the choice about whether religious or nonreligious schools received the money and not the government.
- Since the program provided parents with a number of secular options for educating their children, even though most of the private schools in the program were religious, that was not enough to make out an Establishment Clause violation.

Although *Zelman* has been the subject of a great deal of discussion and analysis, it remains the law of the land and has not been subject to significant challenge in many years. Furthermore, the Supreme Court reinforced the sense that such funding was proper when it turned away a challenge to a tuition tax credit (for every dollar you give, you get to deduct a dollar from your state income tax) for a parochial school in *Arizona Christian School Tuition Organization v. Winn* (2011).

What this means in practice for Jewish schools is that there are many completely legal ways that the government can help pay for any and all private education including Jewish education. Indeed, all six of these programs are in place in various locales.

1. The government can offer tax credits for tuition payments. (Functionally, tax credits mean that wealthy people can send their children to private school for free.)
2. The government can offer donor tax credits, so that when an individual or corporation gives money to a private school, they can deduct that amount from the taxes they pay the state.
3. The government can offer full vouchers to parents of fixed amounts, so that the parents can use that voucher to pay or help pay for tuition at any private school.
4. The government can pay for transportation to and from private schools.

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5. The government can pay for textbooks for secular studies for private school.

6. The government can provide secular studies teachers in parochial schools in certain settings.

And many more such programs are possible.

Why is this important in any conversation about money? The answer is worth repeating over and over again. Every dollar that is given to the parochial school system by federal, state or local government is a dollar that schools themselves do not have to raise. In the case of aid in the form of vouchers or large tax credits, what is being discussed is actually a method of funding Jewish schools that could substantially and directly change how all Jewish schools are funded, dramatically reducing the tuition costs of Jewish education.

For example, if the state or federal government provided voucher subsidies to private and parochial schools nationwide that were only half of the per student cost that government spends on students in public schools, that would mean a government subsidy of more than $6,000 per student per year for Jewish schools. For a Jewish school with 300 students enrolled, that would be a government allocation of more than $1.8 million per year, a truly game-changing sum and yet (one could claim) only half the amount to which the school is actually entitled.

A number of government programs to aid private and parochial schools are both constitutional and under consideration in many jurisdictions.

If the Jewish community were to successfully engage in a long-term lobbying campaign—along with other parochial and private schools of many different faiths—to increase government funding of all private schools, the possible upside would be huge. Besides the value associated with interfaith lobbying around a coalition of the faithful for a common goal, this effort, when successful, could create a model of Jewish schools that are not dependent upon tuition and do not turn away students for financial reasons. This is the model in the UK as well as other Western democratic nations and Israel. In the UK, more than 60% of the Jewish children go to Jewish schools, markedly higher than the number in the US. Reduced tuition would seem to be a major reason.

Going back decades, there has always been a sense that vouchers were constitutionally suspect in the United States, and would be the beginning of the end of the wall of separation. Neither of these objections seem to be correct. What is now clear is that a number of programs to aid private and parochial schools are both constitutional and under consideration in many jurisdictions. These governmental programs are the only way to significantly change the basic funding structure of Jewish day schools, and are worth considering.

The community of those who care about Jewish education ought to be aware of the legal developments of the last decade and support lawful approaches to funding private and parochial schools that aid Jewish education. ■

Our Client is the Jewish Future
RAVSAK
רשת בתי ספר קהילתיים

Meet Two New RAVSAK Board Members

Cass Gottlieb

Tell us something about yourself.

I grew up in the Young Israel of Montreal. It was the center of my extended family's religious and communal life. It was where I went to shul and to school. It was where I learnt to read Rashi, to speak Hebrew, and to love Israel. And, though I didn't know it at the time, it was where I learnt the value of a day school education.

My mother was born in Montreal to immigrants from Uman (Ukraine), and my father emigrated from Poland at the age of ten. Both were raised in traditional homes, but neither had an extensive formal Jewish education. When they started their family in 1948, there were no studies on "what works" to ensure Jewish identity and continuity, but somehow they knew the formula: my siblings and I attended day school for twelve years; participated in a variety of youth groups, from B'nai Akiva to BBYO; went to Jewish summer camps; and traveled to Israel.

As a freshman at McGill University, I became very active in Hillel. However, the demands of architecture school eventually took over, and life was lived in the design studio, away from Hillel and most things Jewish. I did not become involved again in the Jewish community, until my husband, Sheldon, and I moved to Baltimore and began to raise a family. I was introduced to the Associated Jewish Community Federation of Baltimore through its Young Leadership program, and have served for many years on the Associated's board in different capacities, including chair of planning and budgeting for Jewish education. I have also been the board chair of three federation agencies, including the Center for Jewish Education.

Jewish education has been a primary focus of my community involvement. Our three children graduated from Beth Tfiloh Dahan Community School, where I served as president of the board of trustees. I also served as the board chair of Beth Tfiloh Congregation, and as a founding chair of the Mercaz Dahan Center for Jewish Life & Learning (BT's adult learning program). On a national level, I have served as board chair of JESNA, and have recently completed eight years on the board of directors of Hillel International, where I focused on students' Jewish educational experiences. I am currently very active on the boards of the Pearlstone Center and Johns Hopkins Hillel, and I sit on the Associated's Learning Commission, Day School Task Force, and Center for Community Engagement & Leadership.

Why do you think Jewish Day School Education is important?

A Jewish day school graduate thinks differently. She thinks of herself as an American (or Canadian) Jew, rather than as a Jewish American. She thinks of "Jewish" as the essence of who she is, not as an adjective. Whether or not she observes the mitzvot, she thinks of Judaism as an integral part of her identity, not as an occasional activity.

A Jewish day school graduate has the Jewish knowledge and the Jewish self-confidence to make decisions, whether they are personal life decisions or communal leadership decisions, through a Jewish lens. Although there are no guarantees, a Jewish day school graduate is more likely to raise a Jewish family, and to take an active role in the Jewish community.

A Jewish day school graduate sees the bigger Jewish picture. He has internalized the concept of *kol yisrael arevim ze ba'ze*. He feels connected to, and responsible for, Jews in Israel and around the world. He has a universal language—Hebrew—for communicating with his fellow Jews, wherever they live and whatever other languages they speak.

What strengths do you bring to the RAVSAK board?

I have been an active community volunteer for over thirty years, and have served in leadership positions on not-for-profit boards in both the Jewish and secular worlds. So, I guess my greatest strength is experience. Having "cut my teeth" as a lay leader in the Associated system, which has a tradition of developing successful lay/pro relationships, I understand the organizational and personal dynamics necessary to achieve an effective lay/pro partnership.

I believe that I also have something to contribute to the RAVSAK Board as an architect. Creating architecture is a collaborative process. In my professional role, I bring together disparate individuals— clients, contractors, community stakeholders, end-users

and engineers—to build a team of problem-solvers, who help create the vision and the "blueprint" for the final product. Good design, like good governance, is a team effort.

Do you have a favorite Jewish teaching?

ודלא מוסיף, יסיף (*U'dela mosif yaseif*) "One who does not increase, decreases": This very concise and meaningful verse from *Pirkei Avot* (ch.1, v.13) teaches that one who does not increase one's knowledge of Torah on a regular basis, in effect loses ground and loses knowledge.

The importance of this concept was driven home for me twenty-four years ago, when I had the incredible opportunity to participate in the Wexner Heritage program. Since then, Sheldon and I have studied together every Wednesday night with other adult learners at Beth Tfiloh, and I have advocated passionately for Jewishly educating our Jewish leaders.

As Jewish leaders, and especially as RAVSAK leaders in the field of Jewish education, I believe that we have an obligation to constantly increase our own Jewish knowledge and literacy. ■

Ann Bennett

Tell us something about yourself.

I was raised in Northern Virginia and attended a Reform synagogue. Jewish day schools were basically an alien concept to me growing up. It wasn't until I traveled to Israel on a NFTY college program that Judaism really clicked for me. I returned fully inspired to learn and advocate for Jewish causes, which initiated a long string of volunteer leadership positions. Eventually, my children attended a wonderful preschool and we became part of a large contingent that headed to our local Jewish day school for kindergarten. My children would be the first in our extended family to attend a Jewish day school. Who knew that my journey would lead me to become President of Gesher Jewish Day School and be privileged to join the board of RAVSAK!

Why do you believe that Jewish day school education is important?

I love that Jewish day schools can integrate the best of both worlds—secular and Jewish. I love that graduates are unambiguously Jewish, and as comfortable leading services as debating the pros and cons of prohibition. Our schools teach the future generations values that will guide them throughout life and that's pretty important. I also believe that Jewish day schools serve as micro-communities that counter this era of "go it alone." Connection to schools can often be transformational for families; done right, schools can serve as a nurturing home, a place parents can learn with their children, be part of a caring community and feel profoundly connected to Jewish life. That's also pretty important!

What strengths do you bring to the board?

I am fairly strategic in my approach to leadership. I feel keenly aware of the changing landscape of the Jewish community and look forward to working with my colleagues on the board to anticipate and understand what this might mean for community day schools. I hope we can anticipate challenges and interpret trends and turn them into opportunities for our schools. I'm also very passionate about the impact of Jewish day school education for students and their families and I hope that passion will be felt on our board.

Do you have a favorite Jewish teaching?

Not really. Our tradition has so many wise teachings, but a few words that are often foremost in my mind come from the Shema, "And you shall teach them diligently to your children," reminding me of this fundamental obligation. ■

Beyond Possible

Government Funding and Your Day School's Responsibility

■ by **Maury Litwack**

In Litwack's view, the ball is now in day schools' court. Governments are now permitted to give money to private and parochial schools; those schools need to band together and advocate for it.

A decade ago, the Jewish community debated whether vouchers violated the church-state wall and whether this "slippery slope" was worth the potential boon of millions in government aid to Jewish day schools. Since then, numerous judicial rulings have answered the church-state question and created an environment in which more than $1 billion dollars in 19 states, both blue and red, is now being spent on various school choice programs. The question of "possible" is moot. Every Jewish day school is eligible for some form of government funding. Every Jewish day school can participate in advocacy that could deliver services and short-term aid. But most importantly, every Jewish day school can pursue advocacy that could create transformative funding for their school and community.

That's where Jewish day schools, and their professional and lay leaders, must envision, plan, build and assume responsibility.

Through my work with OU Advocacy, I have traveled throughout the United States and have met Jewish day school leaders across the country to discuss the potential support government funding could provide. Surprisingly—shockingly, not even one Jewish day school I or my colleagues have visited has taken complete advantage of the full-range of government resources available. Security aid is granted annually by the federal government; textbook aid is provided in nearly every state; "Title Services," such as professional development, are available in some form to nearly every non-public school and even broadband services are subsidized through the federal E-rate program.

While these programs aren't "transformative" in their funding levels, they do provide *real dollars* that schools are leaving on the table. Programs that provide substantially more funding are also being ignored by many Jewish day schools. In New York State, the "CAP" and "MSR" programs repay schools for taking attendance and for delivering state-mandated services. While CAP and MSR can provide six figure sums to a mid-sized school on an annual basis, we continue to find schools that either don't bother to fill out the forms to receive these funds or are underpaid because they can't be bothered to submit their forms correctly. In New Jersey, 34 schools missed a deadline to submit basic paperwork for funding that would deliver $150 per student in technology and nursing aid. In Maryland, a newly created funding stream for pre-K classes received only one Jewish day school applicant in the greater Washington area. That Jewish day school received more than $100,000 from the state.

In all of these cases, the state funding was available. The Jewish day schools were at fault for not taking advantage of the funding streams.

Lay leaders and administrators seem to enter a state of "brain freeze" when the topic of government funding is broached as a potential budgetary line. Schools that would spend days or weeks pursuing a $5,000 or $10,000 donor's gift will give scant attention to similar funding streams that can come from the government. Committees are formed to pursue six-figure gifts, but when that same level of funding is readily available from the state, schools often can't or don't identify a board member to help them access this "major gift." Endowment committees are led by the most important and influential donors, but when a legislature wants to pursue tax credits which could deliver millions yearly to Jewish day schools, most schools won't offer to testify in support of the bill.

Working together with partner organizations, our advocacy has begun to lead to transformative government funding in some

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states. More than 25 percent of Philadelphia Jewish day school students participate in the Commonwealth's existing state tax credit programs, which inject more than $5 million every year into the Jewish day school system. In Florida, we anticipate that close to $9 million will be allocated next year in a similar tax credit program. This is proven funding that makes a significant dent in the tuition affordability crisis. But the potential is so much greater.

> More than $1 billion dollars in 19 states, both blue and red, is now being spent on various school choice programs.

Imagine being able to provide free pre-K education to all Jewish day school students.

Imagine being able to slash scholarship campaigns in half.

Imagine being able to fully include special needs students in our schools.

Imagine being able to have full security aid, nurses and numerous other critical resources available in all of our schools.

Why not?

The legislative will exists, and the government has proven to be an effective source of funding to Jewish education. But Jewish day schools must invest the time and resources necessary in order to see this potentially tremendous return on their investment. Schools must engage in the following three activities to take responsibility and invest properly in this incredible current and potential funding stream.

Create a committee whose portfolio is government funding. This can be a subcommittee that exists within the development committee, but it must be composed of serious lay leaders willing to pursue this funding. Schools that have created this type of committee have consistently discovered funding that their school wasn't pursuing. More importantly, these committees have forced boards to devote time and resources to advocate when impactful legislation was moving through their state's legislature.

Engage politicians who represent your community. Politicians want to visit your school. Beyond being a great photo opportunity, hosting state legislators develops relationships and helps educate them about the tuition affordability crisis. We've brought hundreds of legislators to Jewish day schools and nearly all leave dumbfounded on the actual costs to run a school.

Activate the grassroots. Jewish day schools represent parents, students and community members. Politicians see this when they visit our schools and interact with our dedicated lay leaders and staff. But politicians need to see the larger engaged community and hear our voice. The Jewish day school community has an anemic voting record. Schools must engage parents about voting to ensure a strong investment in Jewish education. Schools must engage parents to write letters to legislators when important issues are being considered in the state legislature. Schools consistently do this for pro-Israel advocacy. We must reach a comparable level of engagement for Jewish education.

The Jewish day school world must treat government funding as more than just a debate over constitutionality and the potential for big funding. Money is available, more money is possible and transformative funding is achievable. The only question is whether Jewish day schools are willing to take responsibility for this funding. ■

Accessing Public Funds for Special Education in Jewish Day Schools

■ by **Benjamin Mann** and **Deanna Stecker**

Securing resources to serve children with special needs, whether on an individual basis or through a larger program, can be daunting. The authors offer guidance on negotiating government agencies to obtain public funds for this purpose.

Jewish day schools strive to teach students challenging academic content in a range of disciplines, to create caring communities of moral sensitivity, and to graduate future leaders of the Jewish people. This broad set of expectations and aspirations leaves Jewish day school leaders stretching limited resources to accomplish many goals.

Including students with special needs adds to the already formidable challenges faced by Jewish day schools, due to the high cost of resources required to meet such students' learning needs. A PEJE study of special education programs reported that the cost of special education programs ranged "from a few thousand dollars to $18,000 above regular day-school tuition." Most Jewish day schools are unable to cover these extra costs through their regular operating budgets. Jewish day schools have often relied on parents of students with special needs to pay the additional costs. In some cases parents pay for their children's private special education services, including extra supports such as aides and specialists. In other schools additional tuition is charged to parents of students with special needs. While there are also laudable cases in which a family with a child with special needs offered financial support so that a special education program could be developed to meet the needs of their child's and other children's as well at that school, too often families with fewer financial resources are not able to provide these supports, creating an inequitable situation in which access to Jewish education is limited to the wealthy.

One source of funding for special education programs that does not place the financial burden on the families is the government, which by federal law is required to provide publicly funded special education services to students regardless of where they are schooled. At Schechter Manhattan, we have successfully engaged with the local educational agency, in our case the New York City Department of Education, to bring publicly funded special education services into our school for those students who are eligible. Here we describe the challenges of accessing public funds for special education and the strategies we have used to do so.

The Individual with Disabilities Education Act: Provisions for Students with Disabilities in Non-public Schools

The federal law governing special education in the United States is the Individuals with Disabilities Education Act (IDEA), which was renewed and amended by the United States Congress in 2004. While most of the law pertains to public schooling, key provisions of IDEA detail how special education is to be provided to students whose parents enroll them in non-public schools. These provisions are outlined in documents produced by the United States Department of Education (*Children with Disabilities Placed by Their Parents in Private Schools: An IDEA Practices Toolkit*, 2003; *The Individuals with Disabilities Education Act: Provisions Related to Children with Disabilities Enrolled by Their Parents in Private Schools*, 2008). These provisions apply to Jewish day schools and other non-public schools alike, and understanding IDEA is the first step to accessing public funds for special education in non-public schools in the United States.

IDEA establishes that students with disabilities have the right to a free appropriate public education in a least restrictive environ-

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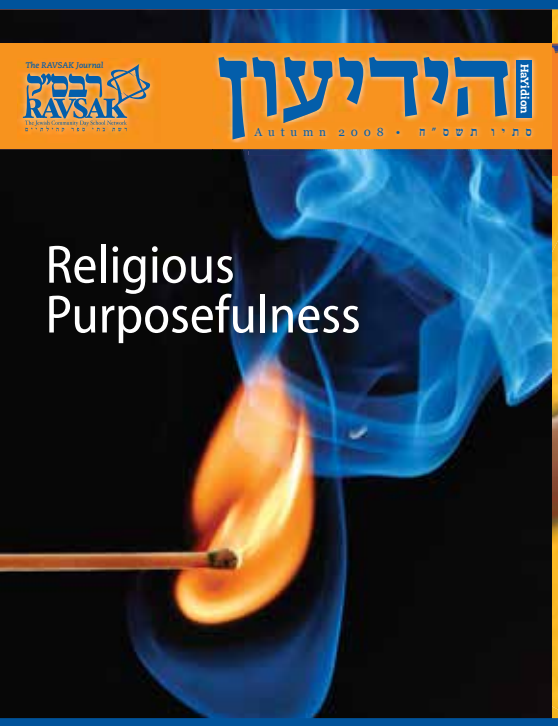

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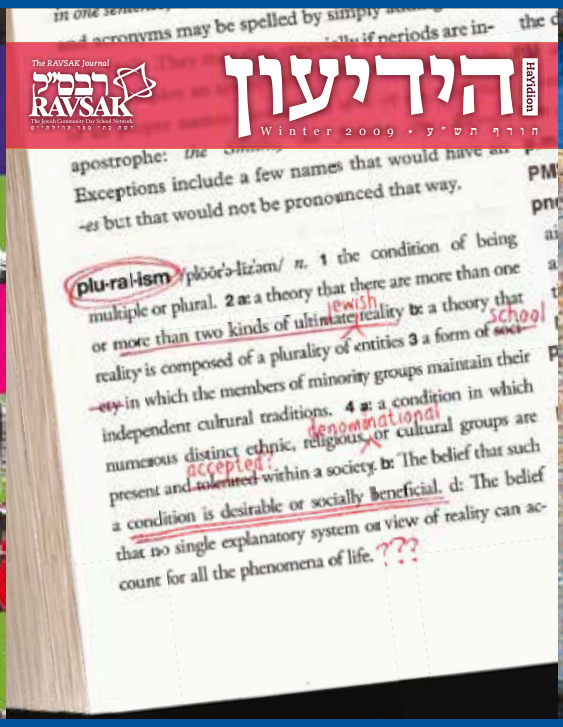

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ment in public schools. IDEA also includes provision for some federal funds to be allocated toward educating students with disabilities in non-public schools. The local educational agency (LEA), or school district, where a non-public school is located is obligated to allocate a portion of federal IDEA funds towards special education students placed in non-public schools.

IDEA prescribes that federal funds may not be used to finance current levels of instruction in a private school or for the general needs of students enrolled in a private school. These provisions pose challenges for non-public schools, as they need to make arrangements for the funds that are available to be spent only on services for eligible students.

IDEA does not offer clarity about the extent and types of services to be provided to students with special needs in non-public schools, leaving those decisions to the LEA. Since there are thousands of LEAs, each operating in different states and contexts, those determinations are often made "in an arbitrary and capricious manner" (Dale McDonald). This theoretical ambiguity leads to practical confusion, as students in different places throughout the United States receive significantly different services, and private schools in different locations navigate different systems and expectations for acquiring public special education funds. Catholic schools, the largest network of non-public schools, report significant difficulties accessing federally mandated special education funds.

Implementation of IDEA varies from state to state and district to district, requiring each private school to develop its own approach to working with the local educational agency.

Special Education at Schechter Manhattan

The Solomon Schechter School of Manhattan is a small Jewish day school in New York City, with an enrollment of 144 students in kindergarten through eighth grade. We have a strong commitment to meeting the individual educational needs of all of our students to the best of our ability as an institution. This mission has driven our intensive work to maximize special education services that are available to our students and bring those services into our building during the school day to the greatest extent possible.

In the 2014-2015 school year, there are 19 students, or 13% of our student body, with special education needs that have been formally identified by the Committee on Special Education (CSE) of the New York City Department of Education. All of these students are currently receiving special education services in our school building during the school day. These services include Special Education Teacher Support Services (SETSS), occupational therapy, physical therapy, speech/language therapy and counseling. To meet the needs of these students, we have two SETSS providers, an occupational therapist, a physical therapist, a speech/language pathologist and a psychologist in our school whose hours range from a few hours a week to full-time. We are fortunate to have developed positive relationships with our providers, which we believe is one of the reasons that our program continues to be successful. These providers all bill the DoE for their work, either directly or through the agency that employs them, and the cost of the support services that they provide students does not impact our school's operating budget.

Accessing these government-funded services was a complex process. Several years ago, we realized that, although a number of our students had an Individualized Education Services Program (IESP), we had very little knowledge about what services these students were entitled to and whether or not they were actually receiving the services. In some cases, parents had taken it upon themselves to arrange services after school, and in other cases, it was clear that parents had tried to arrange services for their children but were put off or overwhelmed by a system that required them to choose and contact providers themselves from a list given by the CSE.

Parents had also told us that, because our students often don't get home from school until after 4, it was just too challenging to fit services in with afterschool activities, dinner and homework. So although these students were entitled to a range of publicly funded special education services, we were trying to meet these students' educational needs during the school day with limited faculty, one learning specialist and one school counselor on staff. We did not have the financial resources to expand our staff and decided to explore what other options were available to us. In September 2012, we took it upon ourselves to enhance the special education program for our students with mandated services by bringing government-funded providers into the building. We accomplished this by means of a number of steps.

Know the Services Available to Your Students

We began by gathering paperwork, which we quickly discovered was a crucial step in the process. We combed through every student file and created a spreadsheet with the names of all of our students with IESPs, their ID numbers, dates of birth and effective dates of their IESPs. We then called parents of students who we thought had services but about whom we had incomplete information in order to be sure that we had information about every student. Soon, we had a complete database of all of our students and the services to which they were entitled.

[CONTINUED ON PAGE 76]

Moot Beit Din

April 16-19, 2015

Preparation for Moot Beit Din 2015 in Los Angeles is underway! Student teams are studying the case and developing their written rulings. Applying biblical, rabbinic and modern sources, students are exploring how Jewish law responds to contemporary situations—this year, to questions about privacy and speech in the age of social media.

In a case dealing with online issues familiar to high school students, each Moot Beit Din team will answer the question: Does a school administrator have the right to suspend a student based on information acquired from SnapChat?

As a result of a new policy allowing schools to field a second team, this year's Moot Beit Din is poised to be the largest yet!

Stay tuned for information about how you can view the Moot Beit Din competition livestreamed on the RAVSAK website.

Thank you to our host schools, Milken Community High School and New Community Jewish High School. We look forward to meeting all the teams at the shabbaton and competition in Los Angeles April 16-19.

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Get to Know Your Local Committee on Special Education or IEP Team

For New York City students attending non-public schools, special education evaluations and services are managed by the ten regional Committees on Special Education (CSE). In other locations, this team may be referred by other names such as the IEP Team. We found that developing a relationship with the various people at our CSE has been key to the success of our program. We began by making sure that someone from our school was physically present, not just on the phone, at every CSE meeting for our students as they came up so as to build personal relationships with the CSE. We were better able to secure much needed services by sharing work samples, anecdotes from the classroom and in-school assessment results. And we were able to learn about and meet in person the people in the CSE office who were responsible for various steps of the process such as sending IESPs to parents, mailing out approval forms that allow service providers to begin providing services mandated on students' IESPs, and assigning agencies that provide related services such as occupational therapy and speech. These relationships have proven to be vitally important year after year, particularly at the start of each school year when we set up services for each of our students.

Since the implementation of special education services in non-public schools varies widely from state to state and district to district, these relationships with public education officials are especially important to help Jewish day school educators understand the local systems for accessing services.

Show Parents That You Are on Their Side

Equally important to the relationship with the CSE or IEP Team is the relationship with each family of a child with special needs. We have worked closely with each family from the beginning of the evaluation process. We let parents know that we are there to advocate for them and help them through what is often a confusing and frustrating process. We make it clear to each family that we are fully supportive of their child and want to work with them to be sure that their child gets what he or she needs in order to be successful in the classroom. When parents have had difficulty getting paperwork from the CSE, we made phone calls to the right people. We help parents get to know and trust the providers working with their children in school and act as mediators if any issues come up. As a result, parents have come to trust us and are willing to work with us to arrange for the needed services.

Value the Providers

Our coordinator of learning support is the go-to person in the school for all of the outside providers that work with our students. Though this takes up a significant amount of her time, we have found that this time is crucial to the success of the program. She devotes many hours at the beginning of each school year to creating a schedule for each provider that is coordinated with each student's schedule of classes and sessions with other providers. She also allocates space and basic supplies for each provider to use in their work with students, facilitates meeting times for the providers to meet classroom teachers, and sets aside time each week throughout the year to meet with the providers to ensure that things are going smoothly. She makes sure that they are aware of the school calendar and any changes in the daily schedule due to special programs, Jewish holidays or visitors.

When the providers are having trouble getting the paperwork that they need in order to be paid by the DOE, adding students to their caseloads, communicating with teachers or reaching parents, the coordinator of learning support gets involved and helps them resolve the issues. In turn, our providers have expressed satisfaction with their work in our school and have returned year after year. Although they are not employed by the school or on our payroll, we treat them as members of our community by inviting them to staff parties and other community events. This makes our school a desirable location for certified service providers to work.

Challenges

The literature and research indicate that government funds for special education are underutilized by private schools. This is in part due to the reality that implementation of IDEA varies widely from state to state and district to district, making it necessary for each private school to develop its own particular approach to working with the local educational agency. Private schools, including Jewish day schools, seeking to offer special education services should make efforts to reach out to the LEA as described above and pursue all legal avenues for getting IDEA funds and services. While IDEA places responsibility on the LEA to offer services to non-public school students, it is not in local school district officials' self-interest to do so, and educators in non-public schools need to initiate action in order to access the services. In order to be successful they should develop collaborative relationships with LEA officials.

They should also know state laws so that they can advocate for their students to receive services. For example, some states allow on-site service provision in religious schools and others do not. Private school leaders need to deal with the situation they encounter in their given states and school districts. These are the types of steps that we took at Schechter Manhattan to navigate the waters of publicly funded special education in our non-public school.

Accessing public funds for students enrolled in non-public schools is challenging, but in our experience, it is worth the effort. Government funds are available to provide special education services to students who are eligible without impacting a Jewish day school's already tight budget or placing an undue financial burden on parents of students with special needs. At Schechter Manhattan, this has allowed us to expand our services and more successfully educate Jewish children with special learning needs. ■

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Steps to Ensure Good Fiscal Oversight

■ by **Laura Matthews**

Strict compliance with best practices of financial oversight are an essential foundation for successful school management. Matthews provides a no-nonsense, nuts-and-bolts how-to for school leaders.

In the world of nonprofits, schools have specific rules and regulations to which they must adhere. A school needs to provide information to its administrators and board of trustees; it must adopt good internal controls and administrative policies; and it must begin these practices when the school is small so that the best practices are in place and additional procedures added as the school grows.

The primary functions of a school's audit and finance committee are to assist the school's board in oversight of the school's financial policies, including the development of its annual budget and long-term financial projections, the integrity of the school's financial statements including the evaluation of the school's system of internal controls over financial reporting, and the qualifications, independence and performance of the school's independent auditors in conjunction with the annual audit. The audit and finance committee is involved in the selection of the independent auditors and review of the tax return.

The school needs to prepare a written document that expresses its procedures for effective risk management and internal controls to safeguard its assets.

The school needs to prepare a written document that expresses its procedures for effective risk management and internal controls to safeguard its assets. This manual should be developed by administration together with the audit/finance committee. The manual needs to be distributed to all financial and administrative employees to clearly describe their duties and responsibilities. There must be a segregation of duties implemented within the accounting and administrative departments to prevent theft, fraud and coercion. The document should be reviewed and updated on an annual basis.

Specific routines should be put in place for the financial operations and internal controls. Different people should be handling different financial areas. Control environment, risk assessment, control activities and monitoring are the key components to the process of internal control. Revenue should be tracked using numerical sequence of invoicing to control the completeness. Expenditures should be accounted for using an accounts payable system. Expenditures should be approved by department heads and compared with budgets approved by the board of directors. The employee who prepares the check should not be the person who signs the checks. Check payments should be prepared once a week and provided to the signatory with proper backup to substantiate the expenditure. Checks requested for immediate payment should be avoided to deter fraud. The employee who prepares the bank deposits and the check disbursements should not be the person who receives the mail and opens the bank statements.

The finance department should develop a monthly package to be prepared for review by management. The package should include the actual activity vs. the budget, bank reconciliations, bank statement, payroll registers, credit card statement, current balance sheet and income statement. It is recommended that financial reports be prepared directly from the accounting software and limit the amount of spreadsheets used outside the general ledger package. Each of the monthly reports should be kept in a binder to be accumulated for the year. If there are changes made to prior transactions, these can be researched back to the monthly packets.

Laura Matthews is a CPA at Matthews & Co, LLP in New York City. lmatthews@matthewsco.com

The accounting staff needs to make sure that all documents are filed and stored securely. Electronically scanned documents should be saved and organized properly. Each employee should be assigned a username and password in a systematic way. No employees should be sharing usernames or passwords. This will assist management to know what work and transactions each employee is responsible for. This will also help management track if an employee is changing any previously reconciled transaction. Some accounting software packages allow an "audit" trail to be functioning. This will help if the school is encountering numerous changes to previously approved and reconciled transactions.

The school must develop a policy for usage of business credit cards by notifying employees of the limitations and type of expenditure that the card can be used for. The school must make sure that employees have been informed that personal expenses are forbidden to be charged on business credit cards.

The payroll department must make sure that complete files are kept securely for each and every employee. These are highly confidential records with the personal information of each employee. The files should clearly document the employee, salary, title, responsibilities, benefits and allowances. These files should be reviewed, evaluated and updated annually.

Schools are usually required to be audited on an annual basis. There are certain accounts that are selected to be tested during the audit procedures. If the school has obtained new financing or purchased new assets, it would be helpful that copies of those related documents be accumulated in a separate binder to prepare during the year for the audit. New contracts and financial commitments should also be kept here.

Schools have numerous opportunities to receive grants. Most of these grants are given for specific restricted purposes. The school should make sure that it can adhere to the requirements and stipulation within the grant document before it accepts the grant. It may be important that a grant director be hired to thoroughly evaluate the specifics of the grant document.

The accounting staff must ensure that all documents are filed and stored securely. Electronic files should be backed up daily and stored away from the main office in case of fire or theft.

The Internal Revenue Service recommends that a nonprofit organization put certain policies in place. The board of directors should complete a written conflict of interest policy disclosing any direct or indirect connection with vendors, employees and clients. This should be signed off on an annual basis. A written whistleblower policy should be developed by the finance committee and distributed to all employees. The policy should describe the appropriate chain to report suspicious activity to. It should also be described that the whistleblower will be protected. Lastly, the school should have a written document retention and destruction policy. Documents should be kept for six years. Electronic files should be backed up daily and stored away from the main office in case of fire or theft.

In conclusion, the financial structure of the school is strongest if the governing board is effective and proactive in serving the school. They are the school's unpaid hearts and souls. ■

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RAVSAK's Judaic Art Contest

Over 40 schools across North America have registered for the 2014 Judaic Art Contest. This year's theme is "Journey," based on the Global Day of Jewish Learning's curriculum about Abraham. Students are studying biblical and rabbinic texts about Abraham's journey as a starting point for creating artwork that interprets the journeys that Abraham and Jews throughout history have taken—personally, collectively, physically and spiritually.

Schools have until December 17 to submit their paintings, drawings, sculpture, mixed media, photography and digital art to RAVSAK, to be evaluated by a panel of noted Jewish artists.

For more information, please contact Yael Steiner, Student Program Coordinator at yael@ravsak.org.

Tamir Eisenbach, Portland Jewish Academy.

Values-Driven Philanthropy

[CONTINUED FROM PAGE 65]

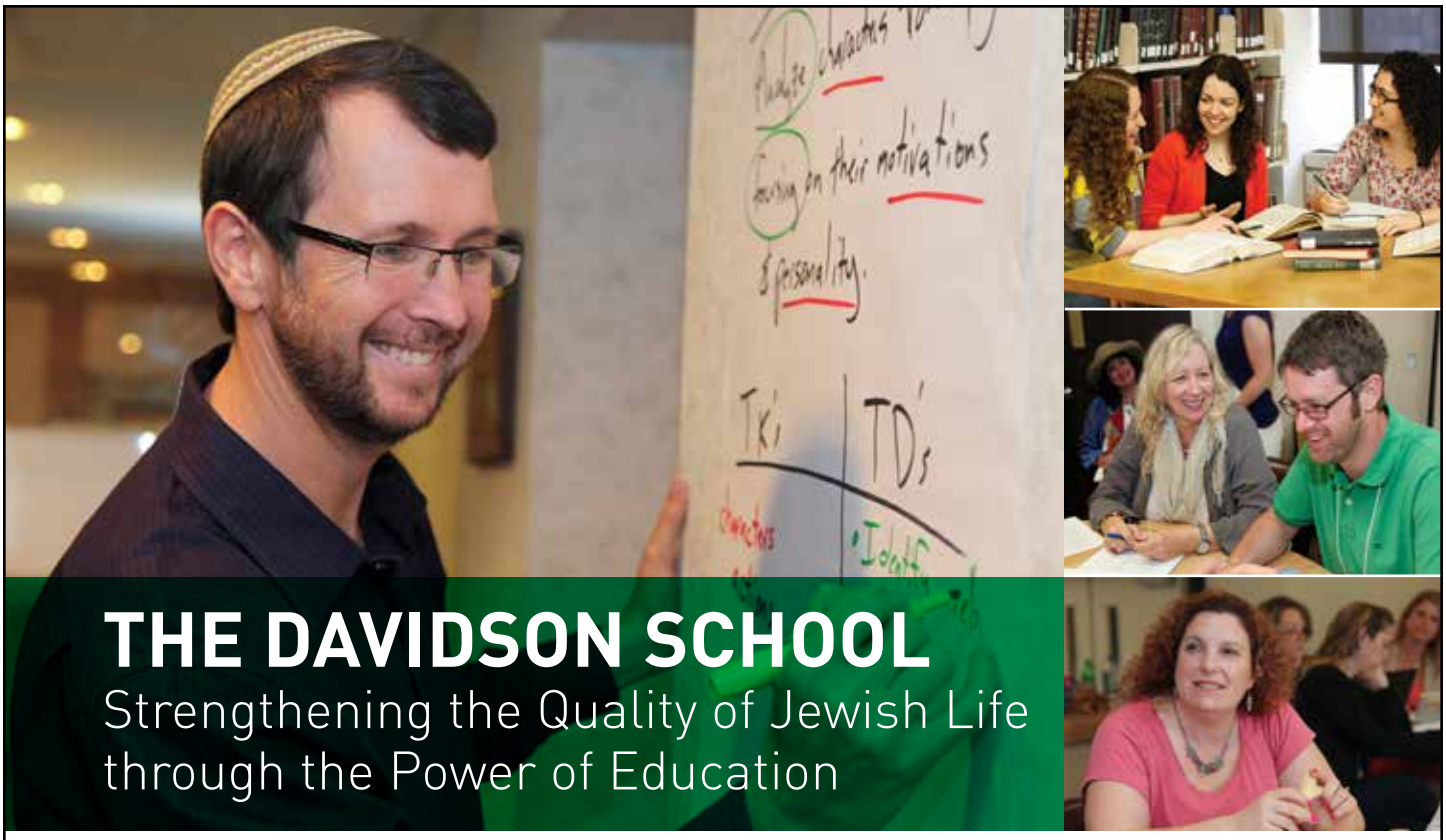
Consider publishing your school's annual report through the lens of each of your core values: your school gala through the lens of Am Echad; grandparents day through the value of Dor l'Dor; your financials through the value of Tikkun Olam; your volunteer recognition through Derech Eretz. These are subtle reminders that the advancement of the school, through fundraising, is integral to the school's values and has deep meaning. At board meetings, submit your development reports with a relevant textual quote at the bottom of your progress report. It makes the numbers meaningful, and connects them literally to Jewish values and text.

In our school, we developed a Statement of Philosophy on Development. We were inspired by the intentionality and philosophical underpinnings that were set forth in our school's Statement of Philosophy on Education, and we created our own for our development work. We use it when we orient new board members, train campaign volunteers, and guide our development committee work. It grounds both the professionals and the volunteers who partner with us, and it helps develop core principles that ensure that our outreach work is principled, and not transactional.

Third, we need to remember that fundraising is not about dollars, it is about people. In order to focus on the people and foster a personal and meaningful experience between volunteers conducting outreach work and potential supporters, we developed a "Meet the Campaign Team" insert into our rollout campaign letters. We included a photo of the volunteers with their families, and had them complete the phrase, "JPDSNC is...." (in four words or less.)

This helped create a meaningful and personal basis for outreach, as potential supporters learned about what motivated others to engage and, of course, reflected on their own meaningful connection to the school. It naturally invoked the questions: What does this school experience mean to my family? How would I complete this phrase? By stimulating a potential supporter to think about these questions, the giving (and asking) experience is more values-based.

If we approach our work with a sense of responsibility in creating meaningful giving experiences, and we focus on "accepting gifts from every person whose heart so moves him," then we will create a deeply rooted culture of philanthropy in our schools. This culture will elevate the giving experience, position us to raise even more funds, and keep us strong and proud in the process. In this way, we will truly make money matter. ■



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Strenghten the Core, Strengthen Leadership Thinking Differently About Day School Funding and Priorities

[CONTINUED FROM PAGE 50]

Changing Leaders' Discourse

What if we put a moratorium on asking the questions of numbers and enrollment, and instead asked, how is student learning in your school? or, how is your educational program evolving in light of your mission and vision? If, indeed, we are trapped in a vicious leadership-management cycle that is closely connected to scarcity of resources, heads and boards need to recognize how our mindsets, speech and learned behaviors contribute to or break the cycle.

This has implications for what we talk about at board and senior management team meetings within schools, as well as what drives the conversations when professional and lay leaders come together across schools, whether within one community or on the national scale. Imagine a national conference not dominated by conversations about declining enrollment, short-term challenges and leadership crisis, but rather by exciting, adaptive, long-term thinking and dreaming about a future full of stronger and more vibrant schools and Jewish communities.

In order to get there, we are going to have to address our underlying, complicated relationship with financial and human resources. We need to reflect honestly as leaders and funders about the relationship between resources and our leadership. I hope that, in addition to exploring the relationships between money, scare resources, and the quality of the leadership in our schools and our communities, heads, boards and funders will have the courage and the vision to invest in the bottom line and to strengthen the core as the foundation upon which innovation and change happens. With the extraordinary amount of wealth and the tremendous, untapped leadership capacity around us, we can unlock and unleash a new cycle of visionary leadership and, as a result, a more sustainable and vibrant future for our schools and the Jewish community. ■

Interview with Paula Gottesman

[CONTINUED FROM PAGE 58]

make change, you need to be in for the long haul. There are no quick fixes in education.

Is there anything else you want to tell us about your relationship with the school or day school education more broadly?

We insisted that there be collaboration among the schools. Previously the day schools in our community didn't even talk to each other. The leaders barely knew each other's names. Today, our Heads of School meet regularly, and the lay and professional leaders of the schools and the Federation meet two times a year at a Day School Council. We brought together three schools (Golda Och Academy, a Solomon Schechter School; Joseph Kushner Hebrew Academy/Rae Kushner Yeshiva High School, a Modern Orthodox School; and the Gottesman RTW Academy, a Community/RAVSAK school). Now there is a fourth school (The Jewish Educational Center, a Centrist Orthodox school) due to a Federation merger. The schools share best, or worst, practices, plan programs together, and share information and ideas on tackling big issues like affordability and enrollment growth. That has been a big blessing, a complete revolution in the community.

Last year we had a teach-in one day. We closed the schools. Teachers from all the schools got together, teachers taught each other, traded ideas and programs, and discussed ways to continue to collaborate and share. Over 300 people were there. It was too large to run every year, so we are doing it every other year and smaller teacher collaborations in the off-years.

Through our foundation and the Community Fund, we established a five-year program called "Vision 2015" in which the schools were challenged to improve in different areas to help them become more sustainable. They had to develop a detailed, long-term plan, and report back every year on how they were doing. Kushner Academy, which is more than 60 years old, had almost no idea who its alumni were. It never kept alumni records; it hired an alumni coordinator, who started running programs, and now they have an alumni organization and alumni relations program. This is so important for private schools to have strong alumni programs. With the Community Fund, we have challenged the schools to think about what they really need and how they will go about fulfilling those needs, how it will make a difference and lead to success.

The day schools in our community have stayed strong and stable, even during the downturn. Enrollment is starting to grow a bit. We know we have helped the day schools become stronger, better and more sustainable. That's important for the schools and our community.

Thank you for sharing all this with us, and thank you for all your support for day schools. We need many more of you. You're setting a very high bar.

We're very fortunate since we get to see the results of what we're doing. We visit the schools and see the teaching excellence program in practice, and we see the new building (for the Gottesman RTW Academy) going up. I always find it breathtaking when people come up to us and say thank you. We even get letters of thanks from students—that blows me away. When a child says, "You enabled me to go to Jewish day school," that's priceless! We hope that our efforts will have a positive effect on not only the child, but on the Jewish community. ■

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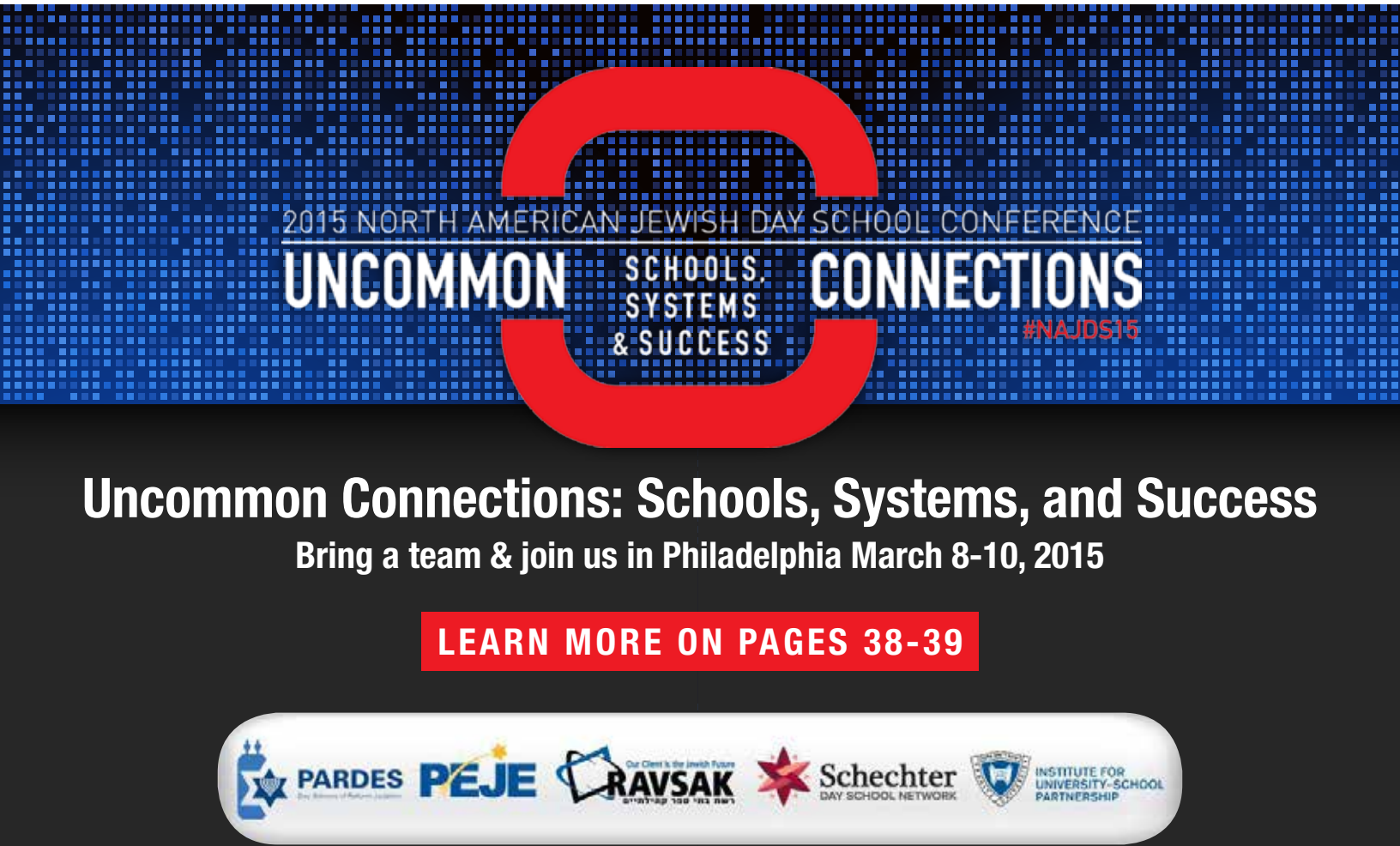

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