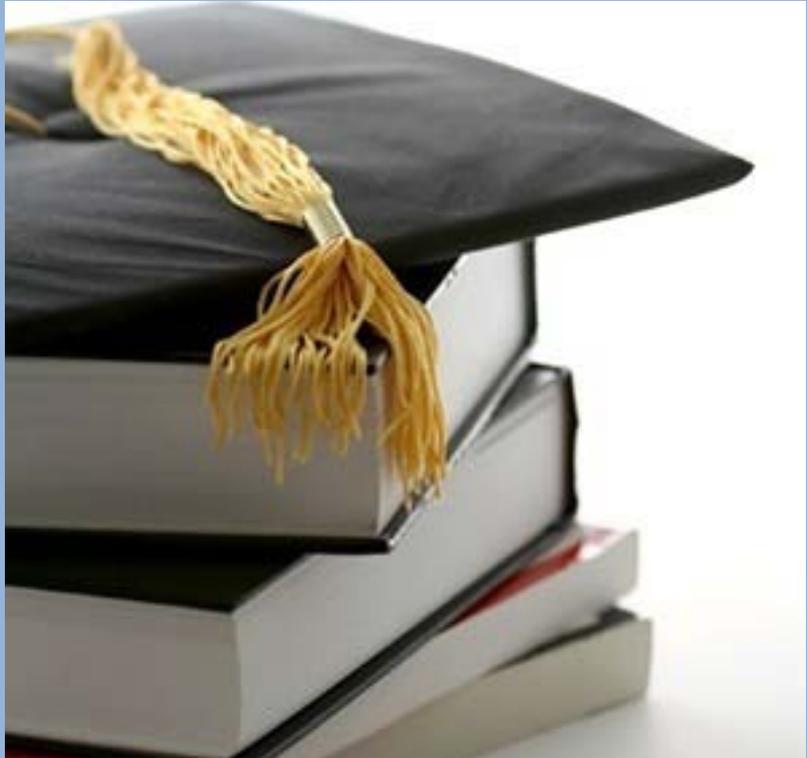


September 2010



ETI

JIM JOSEPH FOUNDATION HIGH SCHOOL
AFFORDABILITY INITIATIVE
2009-2010 EVALUATION REPORT

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Introduction

The Shimon Ben Joseph Foundation, commonly known as the Jim Joseph Foundation (JJF), is devoted exclusively to supporting Jewish youth education. Research conducted by the Jewish Education Service of North America (JESNA) points to a decline in Jewish educational, volunteer, and recreational weekly activity, coupled with clear findings of the positive impacts of a Jewish education on Jewish identity. These findings dovetail with the Foundation's vision of vibrant and ongoing Jewish learning. Toward this end, the JJF approved a six-year challenge grant to the BJE and the Jewish Federation of Greater Los Angeles for a Jewish High School Affordability Initiative (JJFHSAI). The grant will serve as a demonstration project to both stabilize and incrementally increase the enrollment of students from middle income families attending five Jewish high schools. In addition, the grant is designed to help participating schools build capacity to support tuition subsidies in the future through the creation of endowment funds. To facilitate schools' efforts to increase their enrollment and fundraising capacity, the BJE is charged with implementing a marketing campaign as well as providing support to schools. The five high schools participating in the Initiative are Milken Community High School (Milken), New Community Jewish High School (NCJHS), Shalhevet, YULA Boys High School and YULA Girls High School.

The JJF contracted with the Evaluation and Training Institute (ETI) to conduct an independent assessment over the six years of the Initiative (2009-2015). ETI is in the process of conducting a formative evaluation for program improvement including reporting findings for each academic year and concluding with a final report that will summarize the program's overall impacts on schools, students and families as well as inform the feasibility of adapting the Initiative to other communities. Findings from yearly reports will be utilized to modify the Initiative as needed in order to meet its goals. This report presents findings from data collected from the first year of the Initiative (2009-2010)¹ including the Initiative's implementation, effectiveness, and impact.

Methodology

ETI utilized a mixed method evaluation design that incorporated both quantitative data, obtained through school records and surveys, and qualitative data obtained through interviews. School record information included enrollment and endowment data from each school ETI used to determine if the five high schools participating in the JJFHSAI met their required enrollment and endowment benchmarks. In order to gain a comprehensive understanding of the implementation and impact of the JJFHSAI, data were collected from a variety of stakeholders. The following section describes the data collection methods used organized by stakeholder group.

¹ Results presented are based on data collected September 2009 through June 30, 2010.

Development Staff

One of the main goals of the JJFHSAI is that schools build capacity to support tuition subsidies in the future through the creation of endowment funds. Development staff are critical for ensuring that schools are making progress toward reaching their endowment benchmark goals. The development staff at each school completed a survey at the beginning of the year (n=5). In addition, ETI interviewed staff at the end of each quarter (for instruments see **Appendix A**). Staff also completed a survey following their attendance at the February 2010 consortium meeting and the April and May 2010 fundraising seminars to provide feedback about the effectiveness of the meetings and seminars and to provide recommendations for improvement (for instruments see **Appendices B and C**).

Surveys and interviews were designed to capture the following information:

- Overall progress towards meeting endowment benchmark goals
- Progress towards meeting endowment action steps
- Composition and effectiveness of the development team
- Successes and challenges in reaching endowment goals
- Additional desired support
- Relevance and effectiveness of the meetings and seminars
- Recommendations for improving the meetings and seminars

JJFHSAI School Staff and Heads of School

JJFHSAI school staff (e.g. admissions staff, registrar staff) and Heads of School are responsible for ensuring that the Initiative is managed and implemented effectively and efficiently at each school. School staff handle day-to-day issues related to the Initiative, including enrollment and communications with parents. They also attend the consortium meetings and fundraising seminars that are held by the BJE.

School staff and Heads of School have the potential to provide a critical perspective about the implementation and impact of the Initiative as well as valuable recommendations for improving the implementation of the Initiative. ETI conducted interviews with school staff and Heads of School at the end of the academic school year (for instruments see **Appendices D and E**). ETI interviewed 13 staff members (approximately two staff per school). Staff also completed a survey following their attendance at the February 2010 consortium meeting and the April and May 2010 fundraising seminars to provide feedback about the effectiveness of the meetings and seminars and to provide recommendations for improvement (for instruments see **Appendices B and C**).

Surveys and interviews were designed to capture the following information:

- Impact of the Initiative on the school
- Additional desired support
- Relevance and effectiveness of the meetings and seminars

- Recommendations for improving the meetings and seminars
- Effectiveness of the marketing campaign
- Successes and challenges
- Overall recommendations

BJE and PRAD Staff

One of the main components of the JJFHSAI during the first year was the development of a marketing campaign to attract families who would not have enrolled their children in a Jewish high school or might have removed their children from the school before graduation because of a perceived lack of affordability. The BJE hired PRAD Communications (PRAD), a marketing and advertising firm, to assist in the marketing campaign, including the development of a website and advertising materials (e.g. postcards, magazine advertisements). In order to document the marketing efforts that took place, as well as capture any successes, challenges, and recommendations for improving the campaign, ETI conducted interviews with Denny Fisch, CEO of PRAD, and Arlene Agress, Director at the BJE.

Parents

One of the main goals of the JJFHSAI is to stabilize and incrementally increase the enrollment of students from middle-income families attending the five high schools participating in the Initiative. JJF and BJE staff hope to attract parents through the Initiative's marketing campaign. In order to evaluate the effectiveness of the marketing campaign and the overall implementation of the Initiative, ETI administered surveys and conducted interviews with parents. These data collection instruments are described in detail below.

BJE Website Survey. Parents who completed the online application were asked to complete a brief survey (for instrument see **Appendix F**). Data collected from this survey captured family and student characteristics of those who planned to enroll their children in one of the Jewish high schools as well as those who did not. In addition, parents provided feedback about the effectiveness of the marketing campaign and described barriers to enrollment. The survey was completed by 311 parents.

End of Year Survey. Parents, who, after successfully completing an application, decided not to enroll their children in one of the five Initiative high schools, were also asked to complete an online survey at the end of the academic year (for instrument see **Appendix G**). The survey was designed to collect information about how to improve the Initiative and marketing campaign as well as to gather recommendations as to how to more effectively attract families to enroll their children in a Jewish high school. The survey was completed by nine parents.

The survey was designed to capture the following information:

- Feedback about the enrollment process
- Type of school children will attend

- How parents heard about the Initiative
- Barriers to enrollment
- Necessary additional assistance or support

End of Year Interview. Parents who enrolled their children in one of the Initiative high schools provided a unique perspective into the effectiveness of the marketing campaign and implementation of the Initiative. In order to gain an in-depth understanding of each school's enrollment process, the effectiveness of the marketing campaign, and the impact of the Initiative, ETI interviewed 24 parents (approximately five parents from each Initiative high school) who enrolled their children in one of the JJFHSAI high schools for the 2010-2011 academic year and who will be receiving JJF funds (for instrument see **Appendix H**).

Interviews were designed to capture the following information:

- Feedback about the enrollment process
- Type of school previously enrolled in
- Effectiveness of the marketing campaign
- Feedback about the enrollment process
- Reasons for and barriers to enrollment
- Feedback and recommendations for improving the Initiative

Overall Findings

BJE's Role

In order to facilitate schools' progress towards meeting their enrollment and fundraising benchmarks, the BJE was charged with supporting schools with day-to-day assistance as well as convening consortium meetings and fundraising seminars. In addition, BJE staff implemented a marketing campaign to attract families to apply to the five participating high schools. Development staff, JJFHSAI school staff, Heads of School and other relevant school stakeholders provided feedback about the BJE's support through surveys and interviews. In addition, ETI interviewed BJE and PRAD staff regarding the marketing campaign.

Day-to-Day Support

All of the JJFHSAI school staff who were interviewed reported overwhelmingly positive experiences with BJE staff. They reported that **BJE staff were extremely valuable in providing support for schools in meeting their goals**. JJFHSAI staff explained that BJE staff were always available and promptly responded to any questions they had. Ms. Feder, the President of the Board at Shalhevet, was of the opinion that BJE staff went above and beyond their responsibilities in providing Shalhevet with assistance as the school encountered a period of difficult transition with the closing of the lower school and the resignation of its Head of School, Rabbi Weinbach. Specifically, after the closing of the school, BJE staff helped Shalhevet place students and staff in other

schools and after Rabbi Weinbach's resignation; they provided support to ensure that Shalhevet would be on track to meeting its endowment benchmarks.

Consortium Meetings

In order to encourage a collaborative process for the implementation of the JJFHSAI, the BJE held consortium meetings with stakeholders from each of the five participating schools. Since the inception of the Initiative, the BJE has held three meetings: in March 2009, September 2009, and February 2010.

The first two meetings focused on building consensus among stakeholders about the goals of the Initiative; securing agreement on the vision for the grant; ensuring buy-in and compliance with the processes, and modifying processes based on each school's unique characteristics. The goals of the March 2009 meeting were to explain the grant and modify any processes that were not feasible for the schools. The September 2009 meeting included discussions regarding successes and challenges, as well as ways to change and/or expand the JJFHSAI, especially in the areas of public relations and student selection. The goal of the February 2010 meeting was to evaluate the schools' progress, as well as to share successes, challenges, and recommendations for improving the JJFHSAI. Attendees also discussed ways in which the JJF and BJE could support their efforts, namely by providing trainings.

In order to gather feedback about the three consortium meetings, ETI surveyed participants who attended at least one of the meetings (see **Table 1**). Participants who attended the February 2010 meeting completed the survey at the conclusion of the meeting (n=13) and those who did not attend were asked to complete the survey online (n=4). People were asked to provide specific feedback about the first two meetings as well as reflect and comment on their overall experiences during the meetings.

Table 1
Meeting Attended
n=17

	Frequency	Percent
March 2009	8	47
September 2009	14	82
February 2010	13	76

Note: This is a choose all that apply question.

Respondents with various positions from all participating schools completed the survey (see **Tables 2 and 3**).

Table 2
Affiliated School
n=17

	Frequency	Percent
Shalhevet High School	5	29
Milken Community High School	4	24
New Community Jewish High School	4	24
YULA Girls High School	3	18
YULA Boys High School	3	18

Note: This is a choose all that apply question.

Table 3
Title/Position
n=16

	Frequency	Percent
Head of School	5	31
Development/Advancement Staff	5	31
Board President or Representative	2	13
CFO	2	13
Admissions Staff	1	6
Marketing Staff	1	6
Executive Administrator	1	6

Note: This is a choose all that apply question.

Most of the respondents reported that they were satisfied with the frequency of the consortium meetings; however, one of the respondents felt that the consortium met too often and another not often enough (see **Table 4**).

Table 4
Frequency of Meetings
n=17

	Frequency	Percent
Too often	1	6
Not often enough	1	6
The right amount	15	88

A majority of the respondents who attended the March 2009 meeting “strongly agreed” that they understood the vision for the JJFHSAI (50 percent) and how it would be implemented in the Los Angeles community (63 percent). However, the majority of respondents (63 percent) “somewhat agreed” that they understood how the Initiative would be implemented at their school (see **Table 5**).

Table 5
Feedback about the March 2009 Meeting
n=8

After the March 2009 JJFHSAI consortium meeting...	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
I understood the vision for the JJFHSAI	63%	37%	--	--
I understood how the JJFHSAI will be implemented for the LA community	50	50	--	--
I understood how the JJFHSAI will be implemented at my school	37	63	--	--

Most of the respondents who attended the September 2009 meeting either “somewhat agreed” or “strongly agreed” that they were able to give input about how to change/expand the Initiative in the areas of public relations (93 percent) and student selection (79 percent). However, three of the respondents disagreed that they were able to give input about how to change/expand the Initiative in the area of student selection (see **Table 6**).

Table 6
Feedback about the September 2009 Meeting
n=14

The September 2009 JJFHSAI consortium meeting allowed me to give input about...	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
How to change/expand the JJFHSAI in the area of public relations	50%	43%	7%	--
How to change/expand the JJFHSAI in the area of student selection	50	29	21	--

As depicted in **Table 7**, all of the respondents reported that the meetings were conducted effectively, were informative, and covered relevant topics for their school. In addition, most respondents agreed that the consortium meetings have created a collaborative process within the schools (93 percent).

By comparison, respondents reported more disagreement with statements related to how effective the consortium meetings were in fostering collaboration and sharing across the schools (see **Table 7**). For example, 31 percent of respondents disagreed with the statement, "I think the JJFHSAI consortium meetings have created a collaborative process across schools for implementing the JJFHSAI." These findings can be explained, in part, by respondents' open-ended comments. For example, respondents provided comments such as "*at this point, schools are not willing to share,*" and "*schools are keeping their cards close to the vest.*" Respondents' reactions to these statements, therefore, may be more a reflection of the schools' unwillingness to share and less of the effectiveness of the consortium meetings.

Table 7
Overall Feedback
n=14-16²

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
The JJFHSAI consortium meetings are conducted effectively	71%	24%	--	--
The JJFHSAI consortium meetings are informative	64	36	--	--
The JJFHSAI consortium meeting cover topics that are relevant for my high school	60	40	--	--
I think the JJFHSAI consortium meetings have created a collaborative process within my school's JJFHSAI team for implementing the JJFHSAI	53	40	--	7
The JJFHSAI consortium meetings have been a good forum to learn about what other schools are doing regarding the JJFHSAI	31	69	--	--
Learning what other schools are doing is helping my high school be more successful in implementing the JJFHSAI	25	44	31	--
I think the JJFHSAI consortium meetings have created a collaborative process across schools for implementing the JJFHSAI	38	31	25	6

² Not all participants answered all of the questions.

Respondents also provided recommendations for topics they would like to see covered in future consortium meetings. These topics included collaborative goals; endowment strategies and real world tactics; endowment talking points and how to leverage current donors to grow the endowment, and implementing a group approach to raising endowment money. Respondents requested that future meetings also include information about direct development strategizing, coalition endowment fundraising, and planned giving.

Respondents also suggested other stakeholders who they thought should attend the consortium meetings including Advancement leadership, lay leaders, board members, Heads of Boards, and guest speakers with knowledge of endowments.

Additional comments about the meetings and about the JJFHSAI overall included the following:

- *“I don't feel that the experience of the front-line people (those who deal with parents and who review applications) is being taken into account when policies are being put into place.”*
- *“I believe in building bridges for all our schools, just bringing us in the same room is a huge change for the Los Angeles schools. I think the topic of bad debt is something we should all be on the same page about. Enrollment dates are another thing we should all be on the same calendar with.”*
- *“I think feedback from the people who are implementing the tuition assistance awards would be helpful.”*
- *“This is an extremely difficult time to raise money and any help or guidance is appreciated. We need to feel totally secure that the criteria we use to award grants will not change, and are clearly understood.”*

In addition to providing feedback through surveys, development staff, Heads of School, and JJFHSAI school staff also provided feedback about the consortium meetings during the interviews. Although staff felt that the consortium meetings were valuable, they provided recommendations for improvement. Staff reported that while it was helpful to have a large meeting early on for the BJE staff to introduce and explain the Initiative, it would be more effective if the BJE held smaller meetings with the different stakeholders (e.g. Development staff, Heads of School). These meetings could provide specific, practical, hands-on support and also provide a forum where staff could openly discuss successes and challenges. In addition to these meetings, JJFHSAI staff recommended that BJE staff provide individual help for each school that would be tailored to meet their needs.

It is clear from respondents' feedback that, overall, the meetings met their goals of providing them with information about the Initiative as well as obtaining and incorporating feedback from those who attended. However, feedback indicates that initial clarification of how the Initiative was to be implemented at each school would have been helpful. In terms of future support, **respondents recommended that having smaller, stakeholder specific meetings would be valuable.** In addition, respondents

expressed concern that, moving forward, BJE staff may face challenges in promoting collaboration across schools as some of the schools seem to be reluctant to participate.

Fundraising Seminars

The BJE also hosted two fundraising seminars to provide support to schools in their fundraising efforts. The “Building Endowments” seminar, held on April 22, 2010, was a two-hour seminar conducted by Dan Rothblatt, Senior Vice President of the Jewish Community Foundation. The seminar provided introductory information about building and maintaining a successful endowment campaign and covered four main topics: An overview of the Jewish Community Foundation; building a planned giving campaign; setting endowment goals, and strategies to build an endowment campaign. After the seminar, participants were asked to complete a brief survey to capture what they learned during the seminar as well as to provide feedback and recommendations. Six participants completed the survey including two development staff from Shalhevet, three from YULA and one from Milken.

Overall, most participants agreed that they gained information about the topics presented (see **Table 8**). However, in the areas of finding donors and setting goals for their school’s endowment campaign, two of the participants “somewhat disagreed” that they had gained this type of introductory information. Because this seminar was meant to be the first of several sessions, it may be beneficial to address these topics again in future seminars.

Table 8
Endowment Knowledge
n=5-6³

During the seminar I gained introductory information about...	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
The Jewish Community Foundation including available resources and planned giving vehicles.	100%	--	--	--
Building a planned giving campaign.	67	33	--	--
Finding donors who can contribute to my school’s endowment campaign.	33	33	33	--
Targeting donors who can contribute to my school’s endowment campaign.	50	33	17	--
Reinforcing my school’s endowment message.	50	50	--	--
Recognizing donors.	50	50	--	--
Building stewardship.	67	33	--	--
Resolving Board issues.	33	50	17	--
Training staff to support endowment.	67	33	--	--
Software and research that I can use to improve my school’s endowment campaign.	60	40	--	--
Setting goals for my school’s endowment campaign.	67	17	33	--
Different strategies to build my school’s endowment including professional advisors and seminars.	67	17	17	--

³ Not all participants answered all of the questions.

Participants reported overwhelmingly positive feedback about the seminar in terms of presentation and value (see **Table 9**). All participants (100 percent) “strongly agreed” that the speaker was effective, the seminar was informative and that it was conducted effectively. In addition, all participants either “strongly agreed” or “somewhat agreed” that the seminar was relevant for their high school and that it will help them with their endowment campaign. In open-ended feedback, participants noted that the speaker was “*excellent*” and “*informative*” and that the “*timing of the seminar was excellent and helpful.*”

Table 9
Seminar Feedback
n=6

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
The speaker effectively conveyed the topics that were presented.	100%	--	--	--
The speaker effectively answered participants' questions.	100	--	--	--
The seminar was informative.	100	--	--	--
The seminar was conducted effectively.	100	--	--	--
The seminar covered topics that are relevant for my high school's endowment campaign.	83	17	--	--
What I learned today at the seminar will help me make my school's endowment campaign more successful.	67	33	--	--

Participants were also asked to describe the most helpful information or tactic they learned during the seminar. Participants thought that learning about planned giving, including “*the tools to use in going about receiving it*” was valuable as well as learning that they “*can reach donors for the endowment who are not current donors to annual campaigns.*” Another participant noted that learning “*how to set up an endowment*” was most helpful and another appreciated “*looking at fundraising from new perspectives.*” Two of the participants described that having an “*expert*” with “*experience with other real life endowment campaigns*” was beneficial.

Participants also recommended other resources that would be helpful for them to meet their fundraising benchmarks, including a “*seminar for donors,*” “*marketing materials to get donors to contribute to the JJF endowment campaign,*” and “*a seminar about endowment structuring.*”

The “Fundraising Strategies in Difficult Economic Times” seminar, held on May 26, 2010, was a two-hour seminar conducted by Jodi Berman, the Senior Vice President for Leadership Development at the Jewish Federation of Greater Los Angeles⁴. The seminar provided practical information about the principals of fundraising and covered four main topics: Stories and messages, collateral and communications, identifying targets and setting goals, and indentifying donor recognition opportunities. After the seminar, participants were asked to complete a brief survey to capture their feedback

⁴ A follow-up meeting was held on July 1, 2010 for fundraising staff to share their strategies.

about the seminar as well as recommendations. Five participants completed the survey including two development staff from Shalhevet, and one from YULA, Milken and NCJHS.

Participants reported overwhelmingly positive feedback about the seminar (see **Table 10**). All participants (100 percent) “strongly agreed” that the speaker was effective and that the seminar was informative and conducted effectively. All participants (100 percent) also “strongly agreed” that the seminar was relevant for their high school and that it will help them with their fundraising campaign. Through further comments, they noted that the speaker was “*superb*” and that the seminar was “*excellent*” and “*practical*” and provided “*great insight.*”

Table 10
Seminar Feedback
n=5

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
The speaker effectively conveyed the topics that were presented.	100%	--	--	--
The speaker effectively answered participants' questions.	100	--	--	--
The seminar was informative.	100	--	--	--
The seminar was conducted effectively.	100	--	--	--
The seminar covered topics that are relevant for my high school's fundraising campaign.	100	--	--	--
What I learned today at the seminar will help me make my school's fundraising campaign more successful.	100	--	--	--
During the seminar I learned about strategies for successful fundraising.	100	--	--	--

Participants were asked to describe the most helpful information or tactic that they learned during this second seminar. One participant explained that “*it was very helpful learning how to put things into effect immediately.*” Other participants noted that learning about value propositions and how to use a story effectively and articulate key strengths organizationally was most helpful. Participants also recommended other resources that would be helpful for them to meet their fundraising benchmarks, including “*all city strategies,*” “*a seminar for board members,*” “*general endowment training, board training, and donor cultivation and data gathering,*” and “*more brainstorming and best practices.*”

Overall, participants reported that they learned information about fundraising principals and that both seminars were conducted effectively. However, participants still need additional resources, possibly future seminars and one-on-one mentoring, to ensure that they can successfully reach their fundraising benchmarks.

Marketing

The BJE contracted with PRAD Communications (PRAD), a marketing and advertising firm, to develop a marketing campaign for the JJFHSAI. The marketing campaign was designed to raise awareness of and promote the JJFHSAI. In order to gain an in-depth understanding of the implementation and impact of the marketing campaign, ETI collected data from a variety of stakeholders. During interviews with Denny Fisch, CEO of PRAD, and Arlene Agress, Director at the BJE, ETI collected preliminary information in order to establish an initial understanding of the marketing activities that were implemented. Mr. Fisch and Ms. Agress discussed BJE's marketing activities, their perceived impact of the campaign, and lessons learned. ETI also collected information from parents who completed an online survey via the BJE website. In addition, ETI interviewed parents who planned to enroll their children at one of the Initiative high schools and who were awarded a JJFHSAI grant. Parents were asked their perception of the effectiveness of the marketing campaign and provided recommendations for improvement. JJFHSAI school staff also provided recommendations for improving the marketing campaign.

Marketing Campaign

The marketing campaign kicked off on November 1, 2009 with the launch of the BJEla.org website and continued through February 2010. Marketing activities included distributing postcards, publicizing the campaign through print advertisement, and creating a website. Findings presented below are based on interviews conducted with Mr. Fisch and Ms. Agress.

Website. The BJE collaborated with PRAD communications to develop a website for the Initiative designed to help determine parents' eligibility for the JJFHSAI (or other scholarships) through a tuition calculator. Parents also completed an online survey via the BJE website, providing information about their children's educational background, their interest in the JJFHSAI, and perceived barriers to enrolling their children in a Jewish high school. Before the website went live on November 1, 2009, it was field tested with BJE and ETI staff.

Email Blasts. BJE staff sent out email "blasts" to several different stakeholder groups to raise awareness of the Initiative and, particularly, the website. BJE staff sent out emails to board members and executive board members presenting ways that they could let people know about the website. They also sent out emails using email lists of JkidLA, a BJE website which provides resources to parents raising Jewish children in Los Angeles, and the Jewish Student Union, an organization that facilitates club meetings for Jewish students at public high schools.

Media Campaign. The BJE and PRAD launched an extensive media campaign from December 2009 through January 2010, which consisted of print and video advertising throughout Los Angeles County. Full page color advertisements were included in the Performance Magazine for every concert and theatrical performance at the Ahmanson

Theatre, Mark Taper Forum, and the Walt Disney Concert Hall throughout January 2010, targeting theater subscribers and attendees. Half page color advertisements were placed in the Jewish Journal in the December, Chanukah issue and three different advertisements were placed in January issues. The Initiative received additional press in March 2010 when the Jewish Journal published an article about the Initiative. Three different half page color advertisements were also published in the Beverly Hills Courier and the Acorn in January. Finally, three different video flash advertisements were shown in eight Los Angeles Laemmle Theatres prior to every film for six weeks from the middle of December 2009 to the end of January 2010.

Postcard and Poster Campaign. BJE staff distributed postcards to participating JJFHSAI schools, feeder schools (i.e., Jewish middle schools that do not have high schools), synagogues, religious schools, preschool directors, and Jewish camps. Postcards were also available in the lobbies of Laemmle theaters, making the information available to viewers whose interest was piqued after seeing the video advertisements. The postcards had information about the Initiative as well as the website URL. Electronic postcards were also sent to principals of feeder and religious schools.

In addition, posters were displayed in lobbies of Jewish institutions (e.g. schools, synagogues). However, only a few posters were distributed because of timing, i.e., they were made after the postcards. BJE staff expects that the poster campaign will be stronger next year.

Impact of Marketing Campaign

The main goal of the marketing campaign was to attract parents to the BJEIa.org website, particularly parents who would not have enrolled their children in a Jewish high school or might have removed their children from the school before graduation because of a perceived lack of affordability. Findings detailed below suggest that the marketing campaign was successful in attracting parents to the website and raising awareness of the JJFHSAI. However, the majority of parents who applied for the JJFHSAI grant were planning on sending their children to a Jewish high school even if they did not receive the grant.

Based on data from the website, **the marketing campaign was successful in attracting parents to the website.** As of June 30, 2010, there were a total of approximately 3,750 page views, of which 1,588 were unique visitors. Approximately 40 percent of the visitors made two or more clicks within the website indicating that they interacted with the website as opposed to merely viewing it. In addition, Ms. Agress and Mr. Fisch reported that hits on the website peaked after the ads went public when magazines were distributed.

The campaign was also successful in attracting families to apply for the JJFHSAI grant. As of June 30, 2010, 329 parents signed onto the BJE website by entering an ID⁵. Of

⁵ In order to complete the application, parents were required to create an ID in order to ensure a confidential process.

those 329 parents, approximately 311 completed portions of the survey and the JJF tuition calculator.

In order to determine a family's eligibility for a JJFHSAI grant, parents provide their adjusted gross income when completing the online application. Parents who completed the application had a combined mean income of \$144,418 in 2008 (n=269) and a projected mean income of \$139,294 for 2009 (n=267). Based on their income, parents are then designated into three categories: eligible for regular financial aid (SFA), eligible for the JJF grant (JJFHSA), and likely not to qualify for funding (UEC). About half of the parents were eligible for regular financial aid, 43 percent were eligible for the JJF grant, and the remaining four percent were not likely to qualify for any funding (see **Table 11**). **Overall, parents' mean incomes were below the criteria for eligibility for the JJFHSAI and the majority of parents who completed the online application were not eligible for a JJFHSAI grant.**

Table 11
Funding Eligibility Status
n=310

	Frequency	Percent
SFA	163	53
JJFHSA	134	43
UEC	13	4

The marketing campaign was most successful in attracting parents whose children already had a Jewish background with the majority of parents reporting that their children were currently enrolled in Jewish high schools and Hebrew day schools and had some previous Jewish education (see **Tables 12 and 13**). However, it also attracted families who were not enrolled in a Jewish school. Specifically, 24 percent of parents who are exploring the possibility of sending their children to a Jewish high school have children who are currently enrolled in a non-Jewish school and 17 percent of applicants' children had no Jewish educational background.

Table 12
Current School
n=263⁶

	Frequency	Percent
Jewish School	199	76
Jewish high school	122	46
Hebrew day school	77	29
Public School	56	21
Public high school	24	9
Public middle school	26	10
Public day school	6	2
Private School	8	3
Private day school	8	3

⁶ Parents are allowed to apply for grants for multiple children. Results are presented for the first applicant.

Table 13
Previous Jewish education
n=311⁷

	Frequency	Percent	Range of Years	Mean Years
Day school	156	50	1 to 15	8.00
Religious school	147	47	1 to 17	7.81
Child raised in Hebrew speaking home	20	6	12 to 17	14.85
Schooled in Israel	6	2	1 to 8	3.67
None	54	17	--	--

Note: This is a choose all that apply question.

Based on data from the online survey parents completed via the BJE website, **the campaign was advertised most effectively through Jewish high schools**. As seen in **Table 14**, most parents reported that they heard about the JJFHSAI from a Jewish high school (44 percent), followed by word of mouth (27 percent) and from a print advertisement (12 percent). Responses from parents who completed an online survey at the end of the academic year provide a more comprehensive picture of where parents heard about the Initiative. Parents reported that they heard about the JJFHSAI in the Jewish Journal (n=3), a Laemmle Theatre (n=1), on a postcard (n=1), through Jewish high schools (n=4) and word of mouth (n=2). One of the parents noted *“I think the theatre campaign is brilliant -- my son saw the ad and asked if we could apply to one of the schools -- he'd been talking about changing schools already, but hadn't asked about looking at a Jewish school.”*

Table 14
Website Referral
n=254

	Frequency	Percent
Jewish High School	113	44
Word of Mouth	68	27
Print Advertisement	30	12
Mailed Postcard	22	9
Synagogue	22	9
Jewish Middle School	18	7
BJEla.org Web Site	7	3
Non-Jewish High School	1	<1
Non-Jewish Middle School	1	<1
Youth Group	--	--
Other	23	10

Note: This is a choose all that apply question.

Responses from the online survey parents completed via the BJE website confirmed JJF staff's assumption that **financial issues are the main barrier for families who want to enroll their children in a Jewish high school** (see **Table 15**). A child's limited Jewish or Hebrew background is not considered a barrier to enrollment.

⁷ Parents are allowed to apply for grants for multiple children. Results are presented for the first applicant.

Table 15
Barriers to Jewish Education
n=306

	Frequency	Percent
Financial issues	274	83
Distance to the school	10	3
Child's limited Hebrew background	8	2
Child's limited Jewish background	7	2
None	37	11
Other	12	4

Note: This is a choose all that apply question.

According to survey responses, **the majority of parents reported that they would have still enrolled their children in a Jewish high school despite experiencing financial difficulties.** Specifically, 80 percent of the parents reported that they were planning to send their children to a Jewish high school in 2010-2011 before learning about the JJFHSAI grant. Another 13 percent of parents responded that they were undecided (see **Table 16**). **However, this finding was not supported during the interviews with parents, with the exception of parents from YULA. The majority of parents who planned to enroll their children at NCJHS, Milken, and Shalhevet reported that, if they had not received the JJFHSAI grant, they would not have been able to enroll their children at the high school.** All of the parents described their struggle to pay for tuition and explained that they are making personal sacrifices to keep their children enrolled in a Jewish high school.

Table 16
Enrollment in a Jewish High School
n=311

	Frequency	Percent
Yes	250	80
No	20	6
Undecided	41	13

Lessons Learned and Recommendations

Ms. Agress and Mr. Fisch discussed lessons learned from the marketing campaign. First, the marketing campaign cost more than expected. With the limited budget, BJE staff made every effort to maximize the money set aside for the marketing campaign including using connections and negotiating costs. Although BJE has carry-over money from the 2008-2009 budget, the decreased budgets for future years of the Initiative will limit future marketing efforts. Therefore, staff will have to modify their marketing activities to stay within their budget. Second, many people who came to the schools saw the phrase "tuition subsidy" and thought the Initiative would cover all of their children's tuition. Staff realized that, moving forward, **the website and advertisements should clarify that the Initiative is only a partial-subsidy.** Third, staff learned that schools appreciated the different styles of postcards targeting different parent audiences. This allowed schools to choose the most appropriate postcard for their target audience. Therefore, staff will continue to provide different postcards tailored to the different schools. Finally, staff agreed that **changes to the website need to be**

made to ensure more accurate collection of information including having student IDs instead of family IDs, displaying all response options instead of having pull-down menus, and revising the question about children's previous Jewish education.

Parents who were interviewed provided the following recommendations for how the BJE could better promote the Initiative:

- Direct mailings to potentially eligible families.
- Advertising in bulletins of Jewish day schools.
- Link the website to key terms that eligible families will use during online searches.
- Have schools provide information about the JJFHSAI when parents request information about the school.
- Directly contact students and parents who may be eligible via email using schools' email lists.
- Introduce the Initiative during parent meetings in feeder schools and at meetings at temples.

During the interviews, JJFHSAI school staff also provided recommendations for improving the marketing campaign. One staff member recommended targeting older students as well as using a panel of current students to help with the marketing efforts. Another staff member explained that schools could send out invitations to parents who they think would qualify to attend a seminar about the JJFHSAI held by BJE or JJF staff. Finally, one staff member suggested having information about the Initiative at schools' open houses.

Enrollment Benchmarks

One of the main goals of the JJFHSAI is to increase enrollment at the five schools participating in the Initiative. Each school is expected to enroll at least six new students each year and the remaining money can be distributed among additional new students or returning students. **For the 2009-2010 and 2010-2011 academic years, all of the high schools reached their enrollment benchmarks for the JJFHSAI** (see **Tables 17 and 18**). In addition, schools exceeded the grant's minimum requirement of providing subsidies to a total of 30 new students in 2009-2010 and 2010-2011. Finally, all students who received tuition subsidies completed the academic year at their respective schools.

Table 17
2009-2010 JJFHSAI Enrollment

	Milken	NCJHS	Shalhevet	YULA Boys	YULA Girls	Total
New Students	6	6	7	6	6	31
Returning Students	9	8	7	7	11	42
Total	15	14	14	13	17	73

Table 18
2010-2011 JJFHSAI Enrollment⁸

	Milken	NCJHS	Shalhevet	YULA Boys	YULA Girls	Total
New Students	7	6	8	6	6	33
Returning Students	11	13	14	13	16	67
Total	18	19	22	19	22	100

In the original JJFHSAI grant, schools were expected to increase their overall enrollment by eight percent. However, due to the economic climate since the grant was written, schools are struggling to maintain their current levels of enrollment and, as seen in **Table 19, on average, total enrollment has decreased by six percent since the inception of the Initiative.** Schools believe, however, that without the JJFHSAI, they would have experienced an even greater decrease in enrollment. In addition to the economic climate, there are other factors potentially contributing to the enrollment decrease. For instance, schools that experienced decreased enrollment (i.e. NCJHS and YULA Boys) are in competition with other neighboring schools. There are many “excellent” public high schools located near NCJHS which are openly recruiting students from outside their districts and a less expensive high school boys’ yeshiva has recently opened near YULA Boys. In light of these factors, the overall findings suggest that the JJFHSAI was a help in assisting with schools’ enrollment, although this is particularly clear in schools with increased enrollment (i.e. Milken, Shalhevet, and YULA Girls).

Table 19
Percent Change in Total Enrollment

Years	Milken	NCJHS	Shalhevet	YULA Boys	YULA Girls	Average
2008-2009 to 2009-2010	+5%	-4%	+4%	+4%	+4%	+2%
2009-2010 to 2010-2011	+5%	-5%	-1%	-6%	-3%	-3%
Total	+1%	-9%	+3%	-2%	+1%	-6%

Enrollment Process

Parents who enrolled their children in one of the Initiative high schools and parents who, after successfully completing an application, decided not to enroll their children, provided feedback about the enrollment process through interviews and an online survey, respectively. During their interviews, parents discussed their reasons for enrolling their children in one of the Initiative high schools. Most of the parents explained that they wanted to continue to provide their children with a Jewish education. Other parents cited positive aspects of the schools including individual attention, the ethics and morals of the school, and the high quality of education.

Parents who were interviewed, as well as parents who completed a survey, provided feedback about the application process. During their interviews, parents reported that

⁸ Enrollment rates are based on data as of June 30, 2010. Rates may fluctuate slightly in August 2010.

the website application was user-friendly; however, some parents provided recommendations for how it could be improved. Parents suggested that an email should be sent notifying the applicant that their application was successfully submitted. Parents also recommended including an option for users to return to previous pages of the application. In addition, parents suggested having one application per family because it was confusing for parents with more than one child.

Parents also provided feedback about the follow-up they received after submitting their application. After parents complete an online application, school staff are expected to get in touch with families regarding their application. This follow-up is important to provide information to families as well as to keep them invested in enrolling their children at the school. However, several of the parents who were interviewed and surveyed explained that they did not hear from their school of choice for several weeks, if at all. This lack of communication was most problematic at YULA where parents explained that the process was disorganized and that communications with parents were poor.

While parents reported relative ease with the online application, some of the parents explained that the school's financial screening process was time intensive due to the amount of paperwork requested by the school. Parents also explained that it was not clear to them what documents were expected to be submitted and when documents and information were due. In order to improve the process, one parent recommended that schools send out an email with dates and important deadlines in bold type. Another parent recommended that parents be given three to four weeks to gather the requested information.

All of the schools held open houses for new students and parents receiving tuition assistance. The open houses consisted of similar activities across the schools including presentations by Heads of School and students, classroom tours and model lessons, and booths with information about school activities. Parents who attended an open house described it as a positive experience and noted *"the individual who took us on the tour was well informed and very helpful"* and *"I loved the school and thought it would be a perfect fit for my daughter."* Of note, although YULA staff had difficulty effectively communicating with parents throughout the application process, parents who attended YULA's open house felt that it was well organized and that, after attending, they were impressed with the school.

In addition to the open houses, schools offered follow-up meetings with school personnel including Heads of School, admissions staff, and college counselors. The schools discussed similar topics during their interviews including academics, reasons for enrollment, parents' and students' expectations, and the schools' vision or philosophy. All of the parents who participated in an interview described it as a positive experience. One parent explained *"I met with the principal and he was very helpful and welcoming and, importantly, willing to make an effort to help my son make the transition from public school to a Jewish day school curriculum"* while another noted *"it was a well balanced interview that covered both our goals and the schools' goals."*

Parents who were surveyed explained reasons why they decided not to enroll their children at one of the Initiative high schools. Although parents had positive experiences at the schools and some were offered financial aid, **most of the parents explained that they would need additional financial assistance in order to afford the tuition.** Parents also stated that they did not enroll their children in one of the Initiative schools because of concerns about the curriculum, religious environment, and commute. One of the parents explained *“We decided that the curriculum at Shalhevet would be too different from what he was used to in public school and that at this point (going into 11th grade) it was too late to catch up.”* In addition, two of the parents reported that their children were not accepted to their school of choice.

During their interviews, JJFHSAI school staff and Heads of School reported that **it was a challenge to recruit new students whose family income fell within the \$150,000-\$300,000 range.** In addition, because of the economy, there were families who were eligible for the grant last year, but were not eligible this year (e.g. families’ income decreased due to the loss of a parent’s job). Therefore, staff recommended that the JJF consider lowering the income range to accommodate more families.

Staff also discussed challenges they encountered during the application process and provided recommendations for improvement. Staff explained that families had unrealistic expectations of the amount of financial aid they could receive and that they were not informed about the financial aid process. As a result, parents were frustrated that they were ineligible for the grant because they were below the income threshold and were discouraged when they were told that the grant did not cover the full tuition. In response to these criticisms, **staff suggested that the BJE publicize the criteria of the grant including the income range, the information that the grant is only a partial subsidy, the information that families will not be eligible for additional funds from the school if they are awarded the JJFHSAI grant, and the information that they will have to complete additional financial aid forms to apply for the grant.**

In addition, staff provided recommendations to improve the process of providing information to the BJE. They recommended using an electronic format to collect data; using Excel instead of Word; streamlining the reporting requirements; informing staff in advance of the information they will need to collect; allowing schools to test the website before it goes live; discussing the timeline of data collection with school staff and extending the deadline for when information is due, and involving school staff from the beginning. Staff also explained that the confidentiality piece made it extremely difficult to figure out families’ information, particularly because most families did not turn in their online application form. Therefore, staff suggested that the student’s name should be put on the form. In fact, 95 percent of applicants declined to keep their application confidential and provided their contact information, suggesting that eliminating confidentiality would not deter families from applying for the grant, as previously assumed.

School Endowment Capacity

A second goal of the Initiative is for schools to increase their endowment capacity. As part of their participation in the JJFHSAI, the schools are responsible for raising funds to build their endowments. Overall, schools have made strides toward reaching their fundraising goals. All of the schools hired Directors of Development/Advancement and have completed or are in the process of completing their Development Action Plans. In addition, each school has created a fundraising team to raise money for the JJFHSAI endowment.

However, schools' resources vary greatly in terms of the experience and abilities of staff, the structures in place, and the commitment of key donors who are critical to raising endowments. As a result, **schools have made varying degrees of progress towards reaching their endowment benchmarks.** NCJHS hired an experienced Director of Advancement and has had a fundraising team with committed board members since the inception of the school. As a result, NCJHS is the only high school that has met its endowment pledge benchmark this year. Although Milken has not secured any money to date, it has resources in place that staff hope will ensure a successful endowment campaign, including a committed board and access to donors with substantial financial capacity. Milken has solicited a million dollar endowment gift; however, to date, it has not been secured.

Shalhevet and YULA Boys and Girls, however, have struggled to make progress towards meeting their endowment benchmarks this year. Shalhevet experienced two significant disruptions: the closing of the lower school (middle, elementary, and early childhood) in March 2010 and the resignation of Rabbi Weinbach in April 2010. As a result, Shalhevet staff's time and resources were diverted from making progress towards meeting JJFHSAI benchmarks in order to cope with these changes. However, its board members are committed to ensuring that Shalhevet can meet its endowment benchmarks and have a few pledges in place. In addition, with the closing of the lower school, staff believe that they will be able to more successfully raise money for the endowment because the efforts and money previously allocated to sustaining the lower school can now be directed towards the high school, particularly to maintaining the JJF endowment.

YULA Boys and Girls encountered challenges related to personnel and lack of board commitment. YULA currently has two separate boards with different expectations. However, they are currently in the process of merging the boards, and the creation of the fundraising team has helped clarify the boards' expectations. Although staff have solicited donations from board members and key leaders, it is taking longer than expected to secure the pledges.

In addition to the unique challenges each school is facing, all of the schools explained that the economy has impacted their fundraising efforts and will have a greater impact in the last years of the Initiative. **Staff recommended that the JJF consider adjusting the endowment benchmarks to account for the current economic environment.** In

addition, staff suggested that the BJE or JJF use their clout to secure major gifts from people who are not associated with any of the Initiative high schools. The gifts could then be divided among the five schools. Similarly, staff recommended that all five schools collectively approach a donor who is interested in supporting Jewish education, but who is outside of all of the schools' communities.

Unfortunately, there are no proven strategies that schools are utilizing to successfully raise money. Success depends on various factors including individual staff skills, relationships, and fundraising expertise. However, there are some strategies that staff believe to be important to successful fundraising including:

- A fundraising team that includes all key players involved in the school
- Support of the school's vision by the entire fundraising team (including board members)
- Ongoing, constructive communication among members of the fundraising team
- Targeting large donors
- Securing a percentage of the fundraising goal before going public
- Personalizing the fundraising efforts, even if it takes more time and investment
- Encouraging cross-school collaboration and sharing of ideas

Conclusion

The JJFHSAI has come at a critical time when families are struggling to pay for their children's education and schools are struggling to provide financial aid to families in need. All of the schools expressed their gratitude for the JJFHSAI grants and believe that without this funding, they would not have been able to recruit or retain as many students as they have. Parents echoed this sentiment and explained that there is a pervasive problem that Jewish education, particularly Jewish high schools, is not affordable to most Jewish families.

The JJFHSAI funding has also provided schools with the resources to start to build their endowment capacity. Although NCJHS has exceeded its endowment benchmarks and Milken has laid the groundwork for a successful endowment campaign, it is unclear if Shalhevet and YULA Boys and Girls will be able to meet their endowment benchmarks by June, 2011. BJE staff should continue to work closely with Shalhevet and YULA and conduct regular one-on-one follow-up meetings (over the phone and in-person) to ensure that they are making adequate progress towards reaching their endowment benchmarks.

ETI will continue to collect data from relevant stakeholders throughout the remaining years of the Initiative to track the implementation and impact of the Initiative as well as the progress schools are making towards reaching their enrollment and endowment benchmarks. Data collected next year will be particularly informative because schools are required to meet their first endowment benchmarks by June, 2011. In addition, findings will determine if the groundwork schools worked on for their endowment campaign was successful.

School Profiles

The sections below detail the impact the Initiative has had on each of the five high schools participating in the JJFHSAI. Findings are organized by school to provide JJF staff a comprehensive description of each school's experience implementing the JJFHSAI.

Milken Community High School

Milken Community High School (Milken), founded in 1990, is a religious, coeducational, college-preparatory school. Milken's mission is to "develop students with sharp minds, generous hearts, and kind souls" and to "foster a deep connection to Israel, a lifelong dedication to the Jewish people, and a passionate commitment to the service of humanity and the perfection of God's world."

Throughout the 2009-2010 evaluation year, ETI staff collected data from a variety of stakeholders in order to gather information about the impact of the Jim Joseph High School Affordability Initiative (JJFHSAI). ETI staff interviewed the Head of School, Jason Ablin; Director of Development, Jonathan Berg, and the Associate Director of Admissions and School Registrar, Samantha Powell. In addition, we interviewed five parents who plan to enroll their children at Milken in the 2010-2011 academic year and who will receive a JJFHSAI grant.

Impact of Initiative

Overall Impact

The JJFHSAI funding has come at a critical time when families are struggling to pay for their children's education. **According to Milken staff, the main impacts of the JJFHSAI have been on Milken's financial aid capacity, its' relationships with other schools as well as staff's roles and responsibilities.** During his interview, Mr. Ablin, the Head of School, explained that the Initiative has made money available for financial aid. Milken has experienced an increase in requests for financial aid, and the JJFHSAI funds have offset these new requests. As a result, Milken was able to work with eligible families to provide the support they needed to enroll their children at Milken and was able to stabilize its enrollment. Ms. Powell, the Associate Director of Admissions and School Registrar, further explained that, because of the JJFHSAI, the school was able to help approximately 20 families with financial aid. However, she reported that the Initiative did not impact the socio-economic composition of the school because the families attending Milken are already representative of a wide range of income levels.

The JJFHSAI further impacted Milken's financial aid capacity with the hiring of a Director of Development, Mr. Berg. Having a full-time Director of Development has allowed Milken to expand its fundraising efforts beyond focusing on ways to meet its operating budgets. In addition, Milken has been able to develop more creative ways to raise money.

Mr. Berg and Mr. Ablin reported that, as a result of participating in the JJFHSAI, they have developed stronger relationships with other schools in the Initiative. They explained that all of the schools are struggling with the same issues related to enrollment and fundraising and, therefore, can share their successes and challenges to help each other be more successful. For example, once Milken finalizes its fundraising brochure, Mr. Berg would like to share it with other schools so they can use it for their own fundraising efforts.

The JJFHSAI also impacted staffs' roles and responsibilities. Ms. Powell, who became involved in the JJFHSAI last year, explained that she was unable to fulfill her additional responsibilities related to the Initiative. Specifically, the amount of time she had to spend on the JJFHSAI was overwhelming and time consuming including completing all of the paperwork, following up with parents via email and phone, and answering parents' questions. Ms. Powell suggested that the BJE clearly explain to parents the criteria of the grant as well as use electronic versions of forms (see *Enrollment* section for more details).

Enrollment

One of the main goals of the Initiative is to increase enrollment at the five schools participating in the Initiative. **Milken reached its enrollment benchmark for the 2009-2010 JJFHSAI funding year**, providing JJFHSAI grants to 11 returning students and seven new students. Five of the new students had attended Jewish day schools, one had attended a private school, and one had attended a public school during the 2009-2010 academic year. All of the new students will be in the 9th grade in the 2010-2011 academic year. Of the returning students, six will be in the 10th grade, three in the 11th grade, and two in the 12th grade.

Overall, Milken has increased its enrollment by one percent since the inception of the JJFHSAI (see **Table 20**). In the original JJFHSAI grant, schools were expected to increase their enrollment by eight percent. However, due to the economic climate since the grant was written, schools are struggling to maintain their current levels of enrollment. Therefore, having any increase in enrollment, even one percent, suggests that the Initiative was effective in assisting with Milken's enrollment.

Table 20
2008-2011 Milken Enrollment⁹

Year	Enrollment	Percent Change	Total Percent Change
2008-2009	581		
2009-2010	584	+.5%	+.5%
2010-2011	587	+.5%	+1%

Although Milken reached its enrollment benchmark, Ms. Powell explained that it was a challenge to do so. Specifically, **it was difficult to find new students whose families' income fell within the \$150,000-\$300,000 range**. She further explained that families

⁹ Enrollment rates are based on data as of June 30, 2010. Rates may fluctuate slightly in August 2010.

who made below \$150,000 were surprised that they did not qualify for the JJFHSAI grant. In addition, because of the economy, there were families who were eligible for the grant last year, but were not eligible this year (e.g. families' income decreased due to a loss of a parent's job). Mr. Ablin echoed the concern about the "*narrowness of the group that [they] are entrusting the funds to*" and suggested that the JJF consider widening the income range. Nevertheless, Milken was able to provide other funding to families who were not eligible for the grant.

During their interviews, parents described why they decided to enroll their children in Milken. One of the parents explained that she enrolled her child so he would have a Jewish foundation which he did not receive from the secular schools he had been attending. Other parents responded that they have been sending their children to Jewish day school and they wanted to continue to provide their children with a Jewish education. However, based on parents' responses when asked if they would have sent their child to Milken if they had not received the JJFHSAI grant, it is clear that the grant impacted their decision to do so. Three of the five **parents explained that they would have sent their child to a public high school if they had not received the JJFHSAI grant**. The fourth parent said she was unsure if she would have sent her child to a Jewish high school and, because Milken's tuition is expensive, she definitely would not have enrolled her child at Milken. Finally, the fifth parent explained that, even if he did not receive a JJFHSAI grant, he would have sent his child to Milken; however, he is struggling with his decision to keep his child in Jewish education because of the high tuition.

Although parents reported that the website application was user-friendly, some parents provided recommendations for how it could be improved. Two of the parents explained that the application process was unclear. Specifically, they were not given any feedback about their application; for example, if it was successfully submitted or if it was incomplete. One of the parents suggested that an email should be sent notifying the applicant that the application was successfully submitted as well as providing contact information in the event they have questions. Another parent explained that it was unclear what happens if someone applies to more than one school. Specifically, it was not clear whether or not parents would be eligible to qualify for their second choice school if they did not enroll their child in their first choice school. Furthermore, school staff are expected to get in touch with families who provide contact information. However, two of the parents reported that they did not receive a call from Milken after they completed the online application.

Milken held an open house for students and parents which was attended by all of the parents who were interviewed. Parents explained that the open house consisted of tours of classrooms including sample lessons, booths with information about academics and extra-curricular activities, and a presentation by the principals, Head of School as well as a panel of students. Although parents responded that it was "*enjoyable*" and "*informative*", one of the parents felt that it would have been more informative for the parents to have heard how the classes were run instead of sitting through a sample lesson.

In addition to an open house, Milken offered follow-up meetings where students and parents spoke with the Director of Admissions. Parents explained that they discussed academics, what Milken has to offer, and reasons for enrolling their children at Milken. Only one of the parents who was interviewed reported that he was not invited to participate in a follow-up meeting.

While none of the parents encountered difficulties with the online application, two of the parents described their frustration during the school's financial screening process. One of the parents explained that it was not clear what documents were expected to be submitted and when things were due. However, Milken staff responded promptly to clarify all of the parents' questions. Another parent responded that the financial aid application was overwhelming and intrusive in that a multitude of personal financial documents and information had to be submitted from tax returns to showing how much they spend on a housekeeper. This parent suggested that the JJFHSAI grant application should be different from the school's financial aid application and that it should be shorter and more streamlined.

Although parents did not report any difficulties with the online application, Ms. Powell explained the challenges she encountered and provided recommendations for improvement. She explained that parents had unrealistic expectations of the amount of financial aid they could receive and were not informed about the financial aid process. She suggested that the BJE clearly explain to parents the criteria of the grant. Specifically, that the grant is only a partial subsidy, that families will not be eligible for additional funds and that they would have to complete additional financial aid forms to apply. In addition, Ms. Powell encountered several challenges related to providing information to the BJE. She recommended using forms in an electronic format, delineating more clearly if a family did or did not qualify for JJFHSAI funds, clearly communicating the enrollment process to school staff, and revising the deadline for when information is due to align with the school's receipt of complete data and when staff has time to complete the forms (e.g. in the summer when the school has a better idea of students' enrollment status and school has finished for the year). Ms. Powell explained that the confidentiality piece made it extremely difficult to figure out families' information, particularly because most families did not turn in their online application form. She suggested, at a minimum, that the student's name should be put on the form. Finally, she recommended streamlining the reporting requirements to the BJE. She explained that it was redundant to send the BJE the families' online application form since all of the information is already in the system and available to BJE staff.

Fundraising

A second goal of the Initiative is for schools to increase their endowment capacity. Although Milken has not pledged or deposited any money to date towards its JJFHSAI endowment, fundraising staff have laid the groundwork that should ensure a successful endowment campaign.

Fundraising Team. The fundraising team is composed of the Head of School, Director of Education, Director of Alumni Affairs, and Director of Development, who oversees all of Milken's fundraising activities including the annual giving fund, program-based giving fund, and the endowment. Milken also had an annual giving part-time consultant who worked with Mr. Berg through June 2010. All team members work closely together to coordinate fundraising efforts, including determining potential donors and establishing who has relationships with these donors. Mr. Berg and Ms. Benjamin meet once a week to review the status of the endowment fundraising activities. Milken's fundraising team also consists of lay leaders, including the co-chairs of the annual campaign, as well as approximately 20 other parents who help with the annual giving. In the 2010-2011 school year, each team member will be assigned approximately 60-80 donors to contact for the annual giving campaign. During the school year, the team will meet monthly, or as needed.

In addition, Milken is in the process of forming an endowment committee. Milken has an "ask" out to two people to chair the committee as well as a list of people who tentatively agreed to be on the committee. The committee members will identify major gift prospects and conduct initial conversations with peers. Mr. Berg and Mr. Ablin will meet with them and Mr. Ablin and Ms. Benjamin will make the "ask." Finally, Mr. Berg will take care of the necessary paperwork. Mr. Berg believes that, by the end of summer 2010, the committee will be in place.

Funding Benchmarks. Milken's JJF endowment pledge benchmark for 2010-2011 is \$750,000 and its payments-due benchmark is \$250,000. However, internally, the fundraising team has set the benchmarks higher, a \$2 million¹⁰ pledge benchmark and \$500,000 payments-due benchmark, as they are hoping to raise more money. Although they have not pledged or deposited any money to date, they are confident that they will be able to reach their goals.

Fundraising Activities. Milken is upgrading the software for the donor database which will allow staff to consolidate information which they can use on a day to day basis. Mr. Berg believes the database will be ready for use before the start of the 2010-2011 school year. Milken has also created its own Development Action Plan which was approved by the Board. The development team spoke with lay leadership, large donors, and staff to create the plan to ensure buy-in. Furthermore, because the team has various areas for which they need to raise money, they needed to create a more tailored plan that would fit their needs.

Although Milken did not secure or deposit any money as of June 2010, the fundraising team has laid the groundwork that they expect will ensure a successful campaign. The following are strategies Milken staff have accomplished this year and are planning to accomplish in the 2010-2011 academic year:

¹⁰ The \$2 million includes approximately \$500,000 that will be used for non-JJF funds.

- **Hire a development director with a background in fundraising and development.** In September, 2009, Milken hired Jonathan Berg who has a background in fundraising and development.
- **Research successful fundraising strategies.** Mr. Berg contacted and visited schools with experience in successfully raising money. Strategies he learned from these schools informed Milken's fundraising activities.
- **Create an endowment brochure.** An endowment brochure was drafted and will be completed this summer. The brochure will be used during face to face meetings to supplement conversations and will highlight the endowment opportunities at Milken, focusing on the Tuition Assistance Endowment.
- **Raising money through a private campaign.** Milken has asked one major donor for \$1 million and to chair the endowment. They have also asked other donors with less capacity. The \$1 million donation will be contingent on Milken's ability to raise \$1 million from other donors which will be raised in increments of \$100,000. Milken has approximately 35 people on their radar who could donate \$100,000 and are hoping to secure donations from 15-20 donors to be able to match the \$1M donation. Milken believes that securing the \$1 million donation will provide them with leverage to approach the other donors for the other \$1 million. The target date to raise the \$2 million is February 2011. From February 2011 to November 2011 they will continue to target major donors with the capacity to donate \$100,000.
- **Public campaign.** In November 2011, Milken will publicly launch the endowment campaign during the 20th Anniversary Annual Gala with a minimum of \$2 million secured.
- **Personal solicitations.** All solicitations will be made face to face. Solicitations will be made by Mr. Berg, Mr. Ablin, the President of the Board and the endowment chairs. Mr. Berg has conducted many face to face solicitations and, as of June 2010, has closed 127 gifts. Mr. Ablin will make most of the major endowment "asks" and Ms. Benjamin will be involved in all of the school's major solicitations.
- **Tiered and named funds.** Milken will create funds in donors' names as part of the larger endowment. For example, the principal is leaving Milken, so the team is looking at endowing a fund in his name. They hope to have at least 20 named funds before going public.
- **Letter campaign.** Milken will send letters to families to solicit donations. This will start after November 2011 when the endowment goes public.
- **Two-line campaign.** Milken will ask for two gifts at once – annual giving and a onetime gift to the endowment.

Successes. In September 2009, Milken was successful in hiring a new Director of Development. Milken staff have also been very successful in raising non-JJF funds including \$30 million for Milken's capital fund. This money went towards building the middle school which opened in 2009. Their annual giving campaign has also been very successful.

Challenges. Mr. Ablin and Ms. Benjamin discussed the challenges of the current economic climate in relation to the school's ability to meet the benchmarks set forth by the JJF. Since the inception of the Initiative in 2007, the economic downturn has negatively impacted people's ability to give. Therefore, if the JJF extends and/or revises the deadlines for fundraising, they believe that the schools will be more successful in reaching their benchmarks. In addition, Mr. Berg explained that, in the future when Milken has approached everyone in the immediate community, it will be challenging to solicit donors outside of the community.

Recommendations. Mr. Berg recommended that all of the Development Directors have an off-the-record meeting to discuss their successes and challenges. He explained that they are all in similar positions in that they are building an endowment that the school currently does not have. Mr. Berg believes that they can learn from each other, particularly about attempted solutions that did not work. He emphasized that open, candid, useful conversations would only happen without Head of Schools present.

Mr. Berg also recommended that the BJE use its clout to secure major gifts from people who are not associated with any of the Initiative high schools. The gifts could then be divided among the five schools. Similarly, Mr. Ablin recommended that all five schools collectively approach a donor who is interested in supporting Jewish education, but who is outside of all of the schools' communities. Mr. Ablin also recommended that each school have regular contact with JJF staff and meet with them (e.g. once or twice a year), so staff can get direct feedback from the schools instead of just going through the BJE. Mr. Ablin further explained that getting feedback directly from the JJF of how successful they believe the Initiative is would be helpful.

Conclusion

Milken has made strides towards meeting the two main goals of the JJFHSAI – increasing the school's enrollment and endowment capacity. However, Milken may need support to reach its enrollment benchmark next year as it was a challenge to do so this year. In addition, if Milken does not secure its \$1 million donor, the fundraising team will need to reconsider their endowment campaign. ETI will continue to interview Milken staff to inform BJE and JJF staff of its progress towards meeting its 2010-2011 benchmarks.

New Community Jewish High School

New Community Jewish High School (NCJHS), founded in 2002, is a coeducational, college preparatory Jewish high school. NCJHS' mission is to "raise up a new generation of Jewish leaders for whom Jewish values and tradition shape and guide their vision, and for whom knowledge creates possibilities for moral action, good character, and shalom."

Throughout the 2009-2010 evaluation year, ETI staff collected data from a variety of stakeholders in order to gain a comprehensive understanding of both the

implementation and the impact of the (JJFHSAI) on schools and parents. ETI staff interviewed the Head of School, Dr. Bruce Powell; Director of Development, Betsy Berger; the CFO, Carolyn Hapeman, and the Executive Administrator, Jamie Beth Schindler. We interviewed five parents who plan to enroll their children at NCJHS in the 2010-2011 academic year and who will receive a JJFHSAI grant.

Impact of Initiative

Overall Impact

According to NCJHS staff, the main impacts of the JJFHSAI have been on the school board's morale, student enrollment, relationships with other schools, and staff's roles and responsibilities. During his interview, Dr. Powell, the Head of School, explained that, although it was not a planned outcome, the most important impact of the Initiative has been the increased morale of the board members. With an increased sense of responsibility for ensuring that families with legitimate need can afford to enroll their children at NCJHS, Board members' morale has increased knowing that *"they are not alone anymore;"* they have a partnership with the Jim Joseph Foundation (JJF).

As intended, the JJFHSAI has positively impacted NCJHS' student enrollment. Dr. Powell and Ms. Hapeman, the CFO, explained that, because of the Initiative, new families are coming to the school inquiring about Jewish education. Ms. Schindler, the Executive Administrator, reported that the marketing campaign has increased the visibility of the school.

As a result of participating in the JJFHSAI, NCJHS staff have developed stronger relationships with other schools in the Initiative. Specifically, Ms. Berger reported that the relationship among development staff at each school has grown. She explained that the Development Directors of each school are planning on meeting at the schools instead of at the BJE so they can visit and learn about each others' schools. In addition, staff are helping each other in their efforts to raise endowment funds. For example, Ms. Berger received a tip from another Development Director about a parent who will be going to NCJHS who has the capacity to donate. Dr. Powell echoed Ms. Berger's sentiments and explained that, although he had strong relationships with the schools prior to the Initiative, (he was a founder of YULA and Milken), the Initiative has enhanced his relationships and, according to Dr. Powell, has created a *"communality of need."*

Dr. Powell, Ms. Hapeman and Ms. Schindler described how staff's responsibilities have increased because of the Initiative. Ms. Hapeman, who has been involved with the JJFHSAI since its inception, explained that she is now supervising more work. Ms. Schindler, who has been involved with the Initiative since last year, reported that she had to collect more detailed data about individual families. Dr. Powell explained that, overall, the Initiative has been a success and a tremendous help to NCJHS. However, the amount of reporting that was required created a certain level of frustration for staff

and took more time than expected. This was partially due to the fact that, because it was the first year of the Initiative, there was a lack of clarity about what kind of information the BJE and JJF needed. Furthermore, because the school also received the JJF Emergency Grant, staff had to work with a different organization within the Federation and, because the two grants were not coordinated, they had to report similar information with different forms.

Enrollment

One of the main goals of the Initiative is to increase enrollment at the five schools participating in the Initiative. **NCJHS reached its enrollment benchmark for the 2009-2010 JJFHSAI funding year**, providing JJFHSAI grants to 13 returning students and six new students. Two of the new students had attended Jewish day schools, one had attended a private school, and three had attended public schools during the 2009-2010 academic year. Four of the new students will be in the 9th grade, one in the 10th grade and one in the 11th grade in the 2010-2011 academic year. Of the returning students, five will be in the 10th grade, four in the 11th grade and four in the 12th grade.

Overall, NCJHS' enrollment has decreased by nine percent since the inception of the JJFHSAI (see **Table 21**). In the original JJFHSAI grant, schools were expected to increase their enrollment by eight percent. However, due to the economic climate since the grant was written, schools are struggling to maintain their current levels of enrollment. In addition, there are many "excellent" public high schools located near NCJHS which are openly recruiting students from outside their districts. NCJHS believes that without the JJFHSAI, it would have experienced an even greater decrease in enrollment.

Table 21
2008-2011 NCJHS Enrollment¹¹

Year	Enrollment	Percent Change	Total Percent Change
2008-2009	418		
2009-2010	400	-4.3%	-4.3%
2010-2011	380	-5%	-9.3%

In discussing their reasons for enrolling their children in NCJHS, parents explained that they wanted to continue to provide their children with a Jewish education. In addition, parents cited the positive aspects of NCJHS including class size, individual attention, and the ethics and morals of the school. Finally, parents responded that their children were unhappy at public schools because they lack a sense of Jewish community. However, based on parents' responses when asked if they would have sent their children to NCJHS if they had not received the JJFHSAI grant, it is clear that the grant impacted their decision to do so. Two of the five **parents explained that they would have sent their children to a public school if they had not received the JJFHSAI grant**. One of the parents reported that she would have sent her child to a different

¹¹ Enrollment rates are based on data as of June 30, 2010. Rates may fluctuate slightly in August 2010.

Jewish high school, and two of the parents reported that they would have sent their children to NCJHS, although it would have been very difficult.

In response to their interview questions, parents also provided feedback about their application process. Parents largely reported that the website application was user-friendly. One parent, however, recommended including an option for users to return to previous pages of the application. Regarding follow-up from school staff who are expected to get in touch with families who provide contact information, two of the parents reported that NCJHS contacted them within a couple of weeks after they completed the application. Two of the parents, however, responded that their follow-up occurred “a while” after they had completed the application. While parents reported relative ease in applying, some of the parents explained that the school’s financial screening process was time intensive due to the amount of paperwork requested by the school. In addition, one parent explained that the due dates were unclear and recommended that NCJHS send out an email with dates and important deadlines in bold type. One parent also recommended that parents be given three to four weeks to gather the requested information. While there was room for improvement in the financial screening process, parents did note that NCJHS staff were patient and helpful throughout.

All of the students and parents who were interviewed attended NCJHS’ open house or Shadow Day. Parents explained that the open house consisted of booths with information about different activities offered at the school, speakers who discussed the school and its philosophy, and current students and graduates who spoke about their experiences at NCJHS. During Shadow Day, incoming students shadowed a current student around the school and participated in classes. In addition to an open house and Shadow Day, NCJHS offered follow-up meetings where students and parents met with the Director of Admissions, Associate Director of Admissions, Head of School, and college counselor. Parents explained that they discussed NCJHS’ philosophy, whether the school would be a good fit for their child, what it means to have a Jewish education, what they wanted to get out of the school, academics, including course requirements, and the commitment expected of parents.

Although NCJHS reached its enrollment benchmarks, Dr. Powell, Ms. Hapeman and Ms. Schindler reported that it was a challenge to do so, especially for incoming students. Ms. Hapeman explained that families who came to NCJHS fell outside the income requirements on both the low and high ends of the spectrum and, therefore, did not qualify for a JJFHSAI grant. In addition, Ms. Hapeman and Ms. Schindler reported other challenges they encountered and provided recommendations for improvement. Namely, they explained that families had unrealistic expectations about the grant and were frustrated that they were ineligible because they were below the income threshold. In addition, some of the parents were discouraged when they were told that the grant did not cover the full tuition. In response to these criticisms, Ms. Schindler suggested that the BJE publicize the criteria of the grant including the income range, the information that the grant is only a partial subsidy, and the information that families will not be eligible for additional funds from the school if they are awarded the

JJFHSAI grant. NCJHS staff also encountered several challenges related to providing information to the BJE. They recommended using Excel instead of Word to collect data, informing staff in advance of the information they will need to collect, allowing schools to test the website before it goes live, discussing the timeline of data collection with school staff, and involving school staff from the beginning.

Fundraising

A second goal of the Initiative is for schools to increase their endowment capacity. NCJHS has made remarkable progress in raising money for the endowment. Of note, **NCJHS is the only high school in the Initiative to have already met its endowment pledge benchmark.**

Fundraising Team. NCJHS has had a fundraising team since the inception of the school in 2002. The fundraising team, which has broadened in scope over the past year, consists of the Head of School, the CFO, the Vice President of Advancement, the board, lay leaders, community members, and parents. The core members of the team are the Director of Advancement who was hired in September 2009, and the Assistant Director of Advancement.

Members of the fundraising team meet in different capacities. Ms. Berger attends the monthly Board meetings and has ongoing meetings with many of the Board members. Next year, the fundraising team will meet monthly. Each team member works on a different area of fundraising (e.g. annual giving, endowment). The team meets to share information and contacts as well as brainstorm ideas to help each other.

In addition, NCJHS developed an endowment committee consisting of NCJHS' past president, Harold Masor, current President, Mike Greenfield, Dr. Powell, Ms. Berger, and Ms. Goldfarb. The endowment team will meet, at a minimum, once a quarter in the 2010-2011 academic year.

Funding Benchmarks. NCJHS has already exceeded its endowment pledge benchmark of \$750,000 and has secured \$1,054,179¹². NCJHS has also deposited \$262,179, exceeding its \$250,000 payments-due benchmark.

Fundraising Activities. NCJHS prepared its Development Action Plan with all partners involved. It is a continuing process and changes are made as needed. NCJHS is using the following strategies to raise money:

- **Proposals.** Ms. Berger writes proposals which include general information about NCJHS, the needs of the school, and a description of the different levels of gifting. Proposals are sent to people who staff believe care about Jewish education.

¹² Since the grant's inception, NCJHS has secured \$925,000; \$129,179 was pledged prior to the grant's inception.

- **Relational fundraising.** NCJHS utilizes relational fundraising to raise money which includes building relationships and making solicitations personal. Relational fundraising takes time and is a long process. NCJHS does not expect to secure money right away from donors; staff take the time to listen and talk to people about their expectations, what they care about, and what they are willing to give and when. Both the Board and the Head of School make solicitations.
- **Personal letters and calls.** Dr. Powell has written personal letters to the top 200 families' grandparents who would be likely to donate money based on their capacity to give. Dr. Powell also calls parents who, based on the school's research, have the capacity to give money. Dr. Powell explains that the school wants them to be involved. He further explains that the school's main goal is to raise money for the endowment and discusses where parents are in terms of donating money. Finally, Dr. Powell calls and follows-up with parents.
- **Stewardship.** NCJHS follows up to ensure that all donors receive recognition for their donations including recognizing gifts in the school's Annual Report.
- **Target big donors.** The team is not focusing on maximum participation, because they understand that not everyone is willing or able to donate. Instead, NCJHS is targeting people who can donate large amounts of money.

NCJHS has accomplished the following action steps during the 2009-2010 year:

- Formed an endowment committee
- Made pre-solicitations to Board members
- Solicited the first round of Board members
- Cultivated Board and non-Board members
- Engaged in pre-solicitation activities of non-Board members

For the 2010-2011 year, NCJHS plans to continue to solicit people who are most involved at NCJHS. In addition, NCJHS will identify and bring new people into the pipeline and cultivate these relationships so they can solicit money from them. Once NCJHS reaches a certain point (which has yet to be determined), it will announce the campaign to smaller donors so they can also donate to the campaign.

Successes. In September 2009, NCJHS was successful in hiring a new Director of Advancement. In addition, NCJHS has exceeded its endowment pledge benchmark. Ms. Berger believes that being associated with the JJF has made raising money easier. Because the school is part of the JJFHSAI, it is like a "*stamp of approval*" and people know that their gift is maximized because it will be part of the bigger Initiative. She also believes that NCJHS has been successful because of the community and NCJHS' leadership. Specifically, the President, Advancement Vice President, and Executive Vice President understand fundraising. Furthermore, the school has a concrete vision that the entire fundraising team can support and express.

Challenges. Ms. Berger described some of NCJHS' challenges including logistical problems and cultural shifts in philanthropic practices. Logistically, she explained, it has been difficult to elicit positive parent responses for face to face discussions about donating money. Some of these difficulties were due to geographic and scheduling

conflicts. On a broader scale, she believes that it is difficult to get funding for Jewish education, particularly for Jewish high school education, today. Unlike older generations who would give multimillion dollar donations, the current target stakeholders are losing their connection to Jewish education. Overall, she feels that many people today are giving to more non-Jewish causes.

Ms. Berger also explained that the economy has negatively impacted the school's fundraising efforts. The amount of money raised this year was lower than expected and previously reliable donors were unable to donate money. Ms. Berger anticipates that in future years, it will become increasingly difficult to get pledges, there will be fewer people to target, and the process will be increasingly time consuming. A fundraising issue specific to NCJHS is that donors are hesitant to donate money because it is a "young" school. According to Ms. Berger, it is unusual for organizations as new as NCJHS to start an endowment campaign. To mitigate these difficulties, in future years of the Initiative, she explained that staff will need to target people who are outside of the NCJHS community.

Recommendations. Ms. Berger believes that there are not enough donors in Los Angeles to sustain the Initiative. Therefore, she suggested that the JJF or BJE solicit money from major Jewish philanthropists (e.g. Koret, Taube, Lauder, Bronfman, Steinhart). She explained that, once schools have secured money towards their endowments, JJF and BJE staff can describe to potential donors the fundraising accomplishments of the JJF as well as the individual schools. In addition, they can explain to donors that they would be supporting many schools in Los Angeles, not only one.

Conclusion

NCJHS has been successful in meeting the two main goals of the JJFHSAI – increasing the school's enrollment and increasing endowment capacity. While NCJHS met its endowment pledge benchmark this year and is, in fact the only high school to do so, NCJHS may need support to reach its enrollment benchmark next year as it was a challenge to do so this year. ETI will continue to interview NCJHS staff to inform BJE and JJF staff of its progress towards meeting its 2010-2011 benchmarks.

Shalhevet High School

Shalhevet High School (Shalhevet), founded in 1992, is a modern orthodox, coeducational Jewish high school. Shalhevet's vision is to provide a "school in which young Jewish men and women would receive a rigorous modern orthodox Judaic education concurrent with a challenging college preparatory curriculum, in a socially caring community, intentionally designed to have a positive impact on their moral development."

During the 2009-2010 academic year, Shalhevet experienced two significant disruptions: the closing of the lower school (middle, elementary and early childhood) in

March 2010 and the resignation of Rabbi Weinbach in April 2010. As a result, Shalhevet staff's time and resources were diverted from making progress towards meeting its Jim Joseph High School Affordability Initiative (JJFHSAI) benchmarks in order to cope with these changes.

Throughout the 2009-2010 evaluation year, ETI staff collected data from a variety of stakeholders in order to gain a comprehensive understanding of both the implementation and the impact of the (JJFHSAI) on schools and parents. ETI staff interviewed the then Head of School, Rabbi Weinbach; Director of Marketing and Development, Matthew Weintraub; Director of Marketing and Development, Lindy Berman; the President of the Board, Esther Feder; the Office Manager, Rachel Gargir, and the Admissions Director, Debora Parks. In addition, we interviewed five parents who plan to enroll their children at Shalhevet in the 2010-2011 academic year and who will receive a JJFHSAI grant.

Impact of Initiative

Overall Impact

During the interviews, Shalhevet staff discussed the main impacts of the JJFHSAI. Rabbi Weinbach, the Head of School, explained that **the main impacts of the Initiative were increased morale of school staff and increased enrollment.** Ms. Gargir, the Office Manager, and Ms. Feder, the President of the Board, noted that enrollment had been positively impacted by the Initiative. Specifically, Ms. Gargir reported that there were several families who would have left the school and enrolled their children in a public school if they had not received the JJFHSAI grant.

According to Shalhevet staff, the JJFHSAI also impacted Shalhevet's fundraising and marketing efforts. Rabbi Weinbach noted that, as a by-product of starting a development office, the school started to organize its own fundraising efforts. In addition, the Initiative illustrated the need for strategic fundraising. Ms. Feder explained that Shalhevet was able to establish development and marketing teams with JJFHSAI funds. As a result, the school now has an updated website, distributes newsletters, and engages in fundraising activities. In addition, they have been able to advertise the school and are attracting families who would not have thought about coming to the school as well as families who thought they could not afford to send their children to Shalhevet.

Ms. Feder and Rabbi Weinbach reported that, as a result of the Initiative, they have begun to develop relationships with other schools in the Initiative. Ms. Feder explained that the Initiative has built bridges among the high schools and that it was the first time that all of the schools met together. However, she explained that *"it gets tricky because we are all trying to go for the same pool of money and kids."* Rabbi Weinbach further described the situation by noting that *"artificial boundaries exist"* between the schools (e.g. orthodox, non-orthodox) and that it will take time to fully develop these collaborative relationships.

All of these positive changes at the school level have increased the level of staff responsibility. Ms. Gargir, who has been involved with the JJFHSI since last year, and Ms. Parks, the Admissions Director, who will be taking over the responsibilities related to the JJFHSAI, explained that there was a lot of paperwork to complete. They also noted that following-up and calling parents was time consuming. The follow-up was primarily necessary because families were under-reporting their income, and therefore, required follow-up to ascertain their eligibility for the JJFHSAI grant. Therefore, they suggested that the BJE publicize the income range criteria so families will accurately report their income.

Enrollment

One of the main goals of the Initiative is to increase enrollment at the five schools participating in the Initiative. **Shalhevet reached its enrollment benchmark for the 2009-2010 JJFHSAI funding year**, providing JJFHSAI grants to 14 returning students and eight new students. All of the new students had attended Jewish day schools during the 2009-2010 academic year and will be in the 9th grade in the 2010-2011 academic year. Of the returning students, five will be in the 10th grade, two in the 11th grade, and seven in the 12th grade.

Overall, Shalhevet has increased its enrollment by three percent since the inception of the JJFHSAI (see **Table 22**). In the original JJFHSAI grant, schools were expected to increase their enrollment by eight percent. However, due to the economic climate since the grant was written, schools are struggling to maintain their current levels of enrollment. Therefore, having an increase in enrollment, however slight, suggests that the Initiative was effective in assisting with Shalhevet's enrollment.

Table 22
2008-2011 Shalhevet Enrollment¹³

Year	Enrollment	Percent Change	Total Percent Change
2008-2009	180		
2009-2010	188	+4.4%	+4.4%
2010-2011	186	-1%	+3.3%

Although Shalhevet reached its enrollment benchmark, Ms. Gargir explained that **it was a challenge to recruit new students**. She believes that, because families were not aware of the income range criteria, parents who believed they make too much money to be eligible for financial aid did not apply.

In discussing their reasons for enrolling their children in Shalhevet, parents cited positive aspects of the school, including the student camaraderie, the supportive environment, staff's responsiveness to students' needs, school location, and the high quality of education. Parents also explained that they wanted to continue to provide their children with a Jewish education. However, based on parents' responses when asked if they would have sent their child to Shalhevet if they had not received the JJFHSAI

¹³ Enrollment rates are based on data as of June 30, 2010. Rates may fluctuate slightly in August 2010.

grant, it is clear that the grant impacted their decision to do so. Specifically, four of the **parents responded that, if they had not received the JJFHSAI grant, they would not have been able to enroll their children at Shalhevet.** One of the parents explained that he would have sent his child to Shalhevet because sending his child to a Jewish school is a priority for him and his wife. However, he described how he and his wife are making sacrifices to do so, including not saving for retirement.

In response to their interview questions, parents also provided feedback about the application process. Parents largely reported that the website application was “easy” and “very simple.” One parent, however, noted that it was confusing because she has more than one child and suggested that the BJE have one application per family. Another parent recommended including an option for users to return to previous pages of the application. Finally, another parent suggested that an email should be sent notifying the applicant that the application was successfully submitted. Regarding follow-up from school staff who are expected to get in touch with families who provide contact information, most parents reported that Shalhevet contacted them within a week of completing the online application. One of the parents, however, explained that she did not hear from Shalhevet and, when she contacted the school, the staff member did not know that she had applied for the grant.

While parents reported relative ease in applying, some of the parents described their frustrations with the school’s financial screening process. One of the parents expressed concern over providing so much financial information to the school. Another parent noted a lack of communication from school staff about the financial aid process. Specifically, she explained that staff never contacted her about the status of her application. Finally, one of the parents explained that she was frustrated because she received the full grant for one child, but no aid for her second child. She also stated that the school should take into account all family expenses, including tuition for all children, when determining the amount of financial aid that will be awarded.

Shalhevet held an open house for students and parents who will be new to the school, which was attended by three of the parents who were interviewed. Two of the parents did not attend because they were already familiar with the school and did not think it was necessary. The open house started with an assembly where staff described the school. Parents and students then visited different classrooms where they met the teachers. In addition to an open house, two of the parents attended follow-up meetings with the Head of School, the Academic Head of School, and the Director of Admissions. Parents explained that they discussed academics and their reasons for enrolling their children at Shalhevet.

Fundraising

A second goal of the Initiative is for schools to increase their endowment capacity. Historically, Shalhevet did not have a development department as it relied exclusively on major gifts which were solicited by the Head of School or Director. There was no cultivation of or communication between the school and donors. Over time, donors

became less involved in the school and for the past few years there has only been one donor. In addition, as mentioned earlier, **Shalhevet has encountered two significant disruptions this year which have negatively impacted Shalhevet's fundraising progress:** the closing of its lower school and the resignation of its Head of School.

Fundraising Team. During the 2009-2010 academic year, the fundraising team consisted of the Director of Marketing and Development (hired in April 2009), the Executive Director of Marketing and Development (hired in February 2010), and the Head of School (hired in July 2008). As a result of the resignation of Rabbi Weinbach in April 2010, the fundraising team will be restructured to include Abby Yasgur, the incoming President, and two new board members. An endowment committee will also be formed which will be a subset of the fundraising team.

Funding Benchmarks. Shalhevet's JJF endowment pledge benchmark for 2010-2011 is \$500,000 and the payments-due benchmark is \$166,667. In the first quarter, Mr. Weintraub and Ms. Berman did not think that they would be able to reach their pledge benchmark. Shalhevet had not been able to solicit money on behalf of the endowment, in part because donations went towards completing the infrastructure of the building. However, in March 2010 Shalhevet decided that it will discontinue the operation of their lower schools at the end of the 2009-2010 academic year. Therefore, the efforts and money previously allocated to sustaining the lower schools can now be directed towards the high school, particularly to maintaining the JJF endowment.

Shalhevet and BJE staff have recently discovered the loss of the expected \$167,000 donation Rabbi Weinbach reported he secured. Rabbi Weinbach defended his inaccurate reporting by explaining he thought the commitment was not due until the end of the 2010-2011 academic year.

Fundraising Activities. With the closing of the lower schools, the fundraising team is working on adjusting their fundraising efforts to focus on the high school. Mr. Weintraub and Ms. Berman believe that the restructuring of the school will allow them to be more successful in their fundraising efforts as they will be able to focus on the high school, they are no longer in competition with other middle and elementary schools, and they can have more targeted "asks."

The fundraising team is working with a Professional Development coach through the Leadership and Development Academy to revamp their Development Action Plan including creating realistic timelines and goals. Some of Shalhevet's strategies to raise money include:

- **Meeting with potential donors.** The fundraising team is in the process of meeting with people who the team determined to be potential donors. Ms. Berman has a targeted list of a wide range of potential donors who are interested in Jewish education. Meetings are occurring on an ongoing basis.
- **Branding the school.** The development team is working on branding the school to give it a more community-centric and approachable reputation than it has had

in the past. Shalhevet has never focused on developing public relations or cultivating a public image, so staff will work to create better relationships with the community, press, parents, and donors, including the use of newsletters and email blasts. The recent restructuring provides the school with a streamlined foundation upon which to build a public relations campaign. Their public relations campaign will rest on the fact that they are the only coeducational modern orthodox high school in Los Angeles and will use the phrase “just community.” In addition, as a result of the closing of the lower schools, Shalhevet can now brand itself as a financially secure and stable high school.

- **Parent communication.** The development team plans to have frequent communication with parents. It will build a parent base and keep them informed of what is going on at the school in the hopes of creating a donor base. As of April 2010, however, this strategy was put on hold until they rework their branding for parents and they get past the “crisis mode.”
- **Gala.** The Gala was held on May 17, 2010 and raised approximately \$150,000 which will be matched by a donor. The board is discussing what percent will go towards the endowment.
- **Press Kit.** The development team is working on fundraising materials that they can take to donors which will include a brochure detailing their vision statement, school successes, and the school’s needs in the future. The kit will be composed of different components that can be used to target different types of donors.
- **Parlor meetings.** The development team will organize parlor meetings during the summer hosted by board members for donors to raise money for the endowment. They will also bring all major donors together to discuss the impact of the school’s restructuring of the high school and the school’s plan moving forward to get them more invested.

Shalhevet’s 2010-2011 Development Action Plan includes the following actions:

- Collect pledges from board members.
- Establish an Endowment Campaign Leadership Committee. Shalhevet will identify and recruit a committee chair and identify and recruit up to ten members.
- Hold a Trustees dinner which will help raise funds for the JJFHSAI endowment.
- Cultivate donors and solicit pledges.
- Hold “house parties/cultural events” for guests who can pledge \$10,000.

Successes. Shalhevet successfully hired Mr. Berg in April 2009 and Ms. Berman in February 2010 to manage its fundraising team. The fundraising team is working with a Professional Development coach who has been key in helping staff move forward with their fundraising efforts. Since the school’s restructuring, fundraising team staff explained that they have a stronger relationship with the board which is now a more cohesive group. Shalhevet has also created a database of past donors which was a tremendous challenge because there were no coordinated records or public relations mechanism in place in the past. This database is being used to create a donor infrastructure. Staff are gathering information about who each donor is affiliated with and what they are interested in. Staff have also built a new website which is user-friendly, interactive, and allows multiple users to use the website at one time. Shalhevet

has been successful in raising \$1.5 million non-JJF funds in 2008-2009 through a very successful Gala and Trustee's dinner, although the school is still carrying building debt.

Challenges. Mr. Weintraub and Ms. Berman described how personnel and infrastructure issues impeded their ability to start soliciting money in the first quarter. Rabbi Weinbach explained that it was a challenge to find the right candidate with both experience and passion to manage the development department. Shalhevet has been functioning in "crisis mode" for the past five years, so it was difficult for staff to look at long-term investments. Now that the school has closed the lower schools, staff will be able to move forward with their fundraising efforts more successfully. However, there has been resistance from some people in the community about the restructuring. As this decision was announced recently, it is unclear how this resistance will impact their fundraising efforts.

As described above, the closing of the lower schools and the resignation of Rabbi Weinbach have greatly impacted Shalhevet's fundraising progress. Shalhevet will be in a transition period as it looks for a new Head of School. In addition, with the discovery of the loss of the expected \$167,000 secured donation, Shalhevet is "*late in the game,*" although, Ms. Feder explained that she and the board are working hard to ensure that Shalhevet will meet its benchmarks and have a few pledges in place.

Recommendations. Rabbi Weinbach believes that one of the goals of the JJFHSAI should be to unify the five schools involved. However, he believes that it will be a challenge bringing the schools together when in his view, some of the schools seem reluctant to cooperate. In addition, Mr. Weintraub and Ms. Berman explained that it would be helpful to be provided with marketing and growth strategies to grow the endowment campaign with donors and parents.

Conclusion

Despite all of the challenges Shalhevet has faced, it has met its enrollment benchmark and has made progress towards meeting its endowment benchmark. However, because **limited progress was made during the 2009-2010 academic year towards securing money for the endowment campaign**, it is unclear if Shalhevet will be able to meet its endowment benchmarks by June 2011. ETI will continue to interview Shalhevet staff to inform BJE and JJF staff of its progress towards meeting its 2010-2011 benchmarks.

YULA Boys and Girls High Schools

Yeshiva University High Schools of Los Angeles (YULA), founded in 1979, is a private Orthodox Jewish high school. YULA has separate campuses for boys and girls. The mission of YULA is "to provide academic excellence in both Limudei Kodesh and Secular Studies, and to inculcate a love for Torat Yisrael, Am Yisrael and Medinat Yisrael."

Throughout the 2009-2010 evaluation year, ETI staff collected data from a variety of stakeholders in order to gather information about the impact of the Jim Joseph High School Affordability Initiative (JJFHSAI). ETI staff interviewed YULA Girls' Head of School, Rabbi Lieberman; YULA Boys' Head of School, Rabbi Glass; the Director of Development, Rabbi Tombosky; the Registrar, Samantha Hauptman, and the CFO, Colin Gelb. We also interviewed nine parents who plan to enroll their children at YULA in the 2010-2011 academic year and who will receive a JJFHSAI grant. Two of the parents plan to enroll their children at YULA Girls, four at YULA Boys and three have one child who will attend YULA Girls and one who will attend YULA Boys.

Impact of Initiative

Overall Impact

The JJFHSAI funding has come at a critical time when families are struggling to pay for their children's education and schools are struggling to provide financial aid to needy families. **According to YULA staff, the main impacts of the JJFHSAI have been on YULA's enrollment, its' relationships with other schools, and staffs' roles and responsibilities.** During the interviews, Rabbi Lieberman, YULA Girls' Head of School; Rabbi Glass, YULA Boys' Head of School; Samantha Hauptman, the Registrar, and Colin Gelb, the CFO, explained that, because of the JJFHSAI grants, families who would not have been able to afford to enroll their children at YULA were able to do so. Rabbi Glass further explained that if YULA's enrollment numbers declined, it would hurt the integrity of the school.

Rabbi Glass and Rabbi Lieberman reported that, as a result of the Initiative, they have developed stronger relationships with other schools in the Initiative. They explained that schools in the Initiative have discussed coordinating their fundraising efforts by approaching one major donor after they have raised money towards their endowment. In addition, Rabbi Glass suggested developing a listserv so that school staff can communicate with each other.

Finally, with the much needed Initiative in place, the level of staff responsibility has increased. Ms. Hauptman, who has been involved with the JJFHSAI since January 2010, explained that there was a lot of paperwork to complete and following-up with parents was time consuming. She recommended that YULA hire part-time staff, as needed, to help with the workload.

Enrollment

One of the main goals of the Initiative is to increase enrollment at the five schools participating in the Initiative. **YULA Boys reached its enrollment benchmark for the 2009-2010 JJFHSAI funding year**, providing JJFHSAI grants to 13 returning students and six new students. All of the new students had attended Jewish day schools during the 2009-2010 academic year and will be in the 9th grade in the 2010-2011 academic year. Of the returning students, two will be in the 10th grade, six in the 11th grade, and

five in the 12th grade. **YULA Girls also reached its enrollment benchmark**, providing JJFHSAI grants to 16 returning students and six new students. All of the new students had attended Jewish day schools during the 2009-2010 academic year and will be in the 9th grade in the 2010-2011 academic year. Of the returning students, three will be in the 10th grade, seven in the 11th grade, and six in the 12th grade.

Although YULA Girls has increased its enrollment by one percent since the inception of the JJFHSAI (see **Table 23**), YULA Boys' enrollment decreased by two percent (see **Table 24**). In the original JJFHSAI grant, schools were expected to increase their enrollment by eight percent. However, due to the economic climate since the grant was written, schools are struggling to maintain their current levels of enrollment. In addition, a less expensive high school boys' yeshiva has recently opened nearby. Therefore, YULA Girls' increase in enrollment and YULA Boys' slight decrease suggests that the Initiative was effective in assisting with YULA's enrollment.

Table 23
2008-2011 YULA Girls Enrollment¹⁴

Year	Enrollment	Percent Change	Total Percent Change
2008-2009	173		
2009-2010	180	+4%	+4%
2010-2011	174	-3%	+1%

Table 24
2008-2011 YULA Boys Enrollment¹⁴

Year	Enrollment	Percent Change	Total Percent Change
2008-2009	207		
2009-2010	215	+4%	+4%
2010-2011	202	-6%	-2%

Although YULA reached its enrollment benchmark, Mr. Gelb explained that it was a challenge to do so. Specifically, **it was difficult to find new students for YULA Girls** whose family incomes fell within the \$150,000-\$300,000 range. He suggested that the Jim Joseph Foundation (JJF) consider lowering the income requirement to accommodate more families.

In discussing their reasons for enrolling their children in YULA, parents explained that they wanted to continue to provide their children with a Jewish education. Parents responded that the school *"teaches the religious values that are critical to [them]"* and the *"school's religious philosophy matches [their] family's."* In addition, parents cited the academic quality of the school in their decision to enroll their children. Finally, two of the parents stated that they had sent their older children to YULA and were happy with the education they received. Although seven of the **parents responded that they would have sent their children to YULA even if they had not received the JJFHSAI grant**, the other two parents stated that they would not have been able to afford the tuition. Most of the parents explained that sending their children to a public school was not an option because of their religious beliefs. They stated that they would have done

¹⁴ Enrollment rates are based on data as of June 30, 2010. Rates may fluctuate slightly in August 2010.

everything they could to pay for YULA's tuition including making personal sacrifices and borrowing money. Therefore, although most of the parents would have sent their children to YULA even if they did not receive the JJFHSAI grant, it was a tremendous help.

In response to their interview questions, parents also provided feedback about the application process. All of the parents reported that the website application was "simple" and "very easy." However, one of the parents recommended including an option for parents to describe extraneous circumstances that impact a family's financial capacity; for example, a loss of job or debt. Another parent recommended having one application and id per family. Regarding follow-up from school staff who are expected to get in touch with families who provide contact information, only two of the parents reported that YULA contacted them within a couple of weeks after they completed the application. One of the parents responded that YULA contacted them over three months after they completed the online application and three of the parents were never contacted. One of the parents reported that he still has not heard how much money he will be awarded and explained that, in general, YULA is disorganized and needs to improve its communication with parents.

While parents reported relative ease in the actual application process, some of the parents explained that the school's financial screening process was time intensive due to the amount of paperwork requested by the school. Parents understood that staff needed to be thorough to determine the amount of financial aid that should be awarded; however, they reported that it was difficult to provide the amount of information requested in a short period of time. One of the parents also expressed concern over not knowing how YULA ensures that all of the information provided is kept confidential and in a secure place.

Only one parent who was interviewed did not attend YULA's open house because she was already familiar with the school. Parents explained that the open house consisted of tours of classrooms where teachers gave short presentations and model lessons, a presentation by the Heads of School about the school, and current students who spoke about their experiences at YULA. Most of the parents felt that the open house was well organized and that, after attending, they were impressed with the school. In addition to an open house, YULA offered follow-up meetings where students and parents met with the Heads of School. Parents explained that they discussed the vision of the school, academics, and their expectations.

Fundraising

A second goal of the Initiative is for schools to increase their endowment capacity. **Although YULA has not pledged or deposited any money to date towards its JJFHSAI endowment, fundraising staff have started to lay the groundwork that should ensure a successful endowment campaign.**

Fundraising Team. In the past, the board members of YULA Boys and Girls were in charge of development and were very involved with approximately 30% of the solicitations. However, as a result of the JJFHSAI, YULA Boys and Girls created a fundraising team that will be able to strategically raise money for both schools. The fundraising team consists of the Director of Development, the board presidents, and the board chairs, who meet every two weeks. In addition, the team is working with a coach from the PEJE/BJE Leadership and Fundraising Academy.

As part of the JJFHSAI, YULA hired Rabbi Tombosky as its Director of Development in September 2009, to increase donations and build on the existing groundwork, including finding untapped areas to raise money. He has been given the task of merging the development and fundraising operations of both schools into one seamless and integrated development office while maintaining the structural integrity and otherwise legal and operational independence of each school.

Funding Benchmarks. Even though YULA has not secured or deposited any money, Rabbi Glass, Rabbi Lieberman, and Rabbi Tombosky are confident that each school will meet the endowment pledge benchmarks of \$250,000 and the payments-due benchmarks of \$83,333 for 2010-2011. The endowment will be built primarily with legacy gifts and will be treated as a capital campaign. Before going public, YULA wants to be able to announce a substantial lead gift, 25%-30% of its fundraising goal. Staff have been meeting with board members and funding families and are confident that they will secure their first significant pledges in the summer 2010. They anticipate having these pledges paid off over five years. They are also anticipating having a lead gift from their Board of Directors.

Fundraising Activities. Rabbi Tombosky developed the Development Action Plan with the board presidents. Some of YULA's strategies to raise money include:

- **Board development.** YULA has created a new fundraising team consisting of the Director of Development, board presidents and chairs of each school.
- **Target board members.** The fundraising team has met with board members and has solicited pledges. However, Rabbi Tombosky reported that it is taking longer than expected to secure the pledges. The team is also holding a board retreat at the end of August to discuss fundraising. Rabbi Tombosky explained that the purpose of the retreat is to promote a culture of giving, educate the board about fundraising, announce pledges, and solicit pledges from board members who have not yet pledged.
- **Target key donors.** Fundraising team members are planning a kick-off event with 30-50 key donors (non-board members) where they will announce the lead gift and explain that their short-term goal is to discuss donors' involvement in the endowment campaign. The event will occur after the board retreat because the team wants the board to be fully committed and educated about YULA's endowment campaign before targeting donors.
- **Target parents and staff.** YULA wants to get 100 percent participation from all parents and staff. Fundraising staff know that parents and staff will not all be significant donors but they want to be able to show that they have internal

commitment before going public. They will hold parlor meetings in the summer for teachers and staff and hope to secure donations by October 2010.

- **Alumni development.** YULA is currently contacting, reengaging and building relationships with its alumni (YULA has approximately 2,000 alumni). Through the use of Facebook, YULA found almost 1,000 alumni. YULA is also looking into creating a mentorship program where current students can connect with alumni. This program will not only benefit students but will allow alumni to feel a sense of ownership and connection to the school. Two alumni events were held in New York in March 2010. These events targeted college and graduate school YULA alumni in the hope of building the groundwork for future fundraising solicitations.
- **Target philanthropists.** Once YULA has a strong, compelling story and statement (e.g. 100 percent internal commitment) the team will target philanthropists who are not yet involved in the school.
- **Target current annual donors.** YULA has solidified most of the schools' annual gifts for the year. Now the fundraising team needs to solicit legacy and endowment gifts.

In addition to creating a donor database, the fundraising team is also working on creating a compelling "mantra" that describes what makes YULA unique schools. They are also working on the following marketing strategies:

- **Endowment.** YULA is approaching the endowment campaign as a capital campaign. The team is creating discriminate smaller funds within larger funds so people will know where their money is going.
- **Community awareness.** YULA is working on a community awareness campaign to publicize both schools. Fundraising staff have created brochures about YULA's three campaigns: annual, capital, and endowment. These brochures will be used once staff have secured money from major donors.
- **Internal marketing.** YULA is targeting current and future parents, focusing on education. The board created a new Public Relations committee that is implementing the marketing strategy.

Successes. YULA Girls' capital campaign to raise money for the cafeteria was successful in raising \$350,000 to date. The Trustee Dinner was also a success, raising approximately 15% more than last year, partly due to the decreased cost of the event. In addition to creating a new fundraising team, YULA has been working with a coach through the PEJE/BJE Leadership and Fundraising Academy who is advising staff on realistic fundraising goals including who they should target.

Challenges. Although YULA is a mature 30 year old organization, it changed from being owned by the Wiesenthal Museum to being community schools. In addition, there has been a lot of internal turnover and the current staff have only been working at the school for the past two to five years. Rabbi Tombosky explained that the lack of structure has led to a lack of clarity and clearly defined partnership between him and the staff.

Rabbi Tombosky also explained that YULA faces the challenge of getting the message out to the community that the schools need support. In addition, it is a challenge to secure money for endowments because it is not meeting an immediate need. He further noted the need for YULA to strike a balance between annual giving and funding an endowment.

Being a Director of Development for two schools raises several challenges including:

- Dividing time equally across both schools.
- Structural challenges, including reporting to two boards and two Heads of Schools.
- Meeting different expectations put forward by both schools.

However, since the creation of the fundraising team, the expectations have been made a lot clearer.

Recommendations. Rabbi Tombosky suggested that the foundation make resources available to schools; for example, describing how to build endowments, presenting best practices in fundraising and having development directors meet with mentors who can help and guide them. Rabbi Glass and Rabbi Lieberman further suggested that the JJF centralize its technological resources and possibly have a tech support person available to assist schools that have technological questions. Rabbi Tombosky also suggested that the schools work together, including creating a coalition of development directors from each school. This coalition can approach mega donors for a sizeable gift to the Foundation that could be allocated proportionately to each school. Similarly, there should be coordination among the schools if they are targeting major donors. Finally, he reported that he would appreciate feedback and suggestions of fundraising strategies that have proven successful.

Conclusion

Despite all of the challenges YULA has faced, it has met its enrollment benchmark and has made progress towards meeting its endowment benchmark. However, because limited progress was made during the 2009-2010 academic year towards securing money for the endowment campaign, specifically securing commitments from board members and key leaders, it is unclear if YULA will be able to meet its endowment benchmarks by June 2011. YULA's Development Action Plan relies on major pledges from board members and if YULA cannot secure them, it is unclear how it will impact its fundraising efforts. ETI will continue to interview YULA staff to inform BJE and JJF staff of its progress towards meeting its 2010-2011 benchmarks.

Appendices

Appendix A. Development Staff Survey and Interview Protocols

Appendix B. Consortium Meeting Survey

Appendix C. Fundraising Seminar Surveys

Appendix D. JFHSAI School Staff Interview Protocol

Appendix E. Heads of School Interview Protocol

Appendix F. BJE Website Survey

Appendix G. Parent End of Year Survey

Appendix H. Parent End of Year Interview Protocol

APPENDIX A

**Jim Joseph Foundation High School Affordability Initiative
Fundraising Progress Survey
Quarter Two**

To be completed by development staff at each high school. All questions are mandatory.

This survey is to be completed by the development staff of each high school in order to gain a better understanding of the fundraising progress at each school. Please consult with members of your fundraising team when completing the survey.

Thank you for your help!

1. Please select the high school with whom you are affiliated:

- Milken Community High School
- New Community Jewish High School
- Shalhevet High School
- YULA Girls High School
- YULA Boys High School

2. Please list the names of the members of your fundraising team and if they participated in completing the survey.

Name: _____
 Participated (Y/N): _____
 Name: _____
 Participated (Y/N): _____

3. What is your high school's **JJF Initiative endowment pledge** benchmark for the 2010-2011 academic year? _____
4. Please provide the approximate dollar amount in **JJF Initiative endowment pledges** your high school has secured to date. _____
5. What is your high school's **JJF Initiative endowment payments-due** benchmark for the 2010-2011 academic year? _____
6. Please provide the approximate dollar amount in **JJF Initiative endowment payments** your high school has deposited to date. _____

The following questions address non-JJF Initiative fundraising efforts. If any of the following questions do not apply to the fundraising efforts at your school, please put N/A.

7. Please provide your school's **non-JJF Initiative annual fundraising** goal for 2009-2010. _____
8. Please provide the approximate dollar amount in **non-JJF Initiative annual fundraising pledges** your high school has secured in the 2009-2010 academic year. _____
9. Please provide the approximate dollar amount in **non-JJF Initiative annual fundraising payments** your high school has deposited in the 2009-2010 academic year. _____
10. Please provide your schools' **non-JJF Initiative capital project fundraising** goal for 2009-2010. _____
11. Please provide the approximate dollar amount in **non-JJF Initiative capital project fundraising pledges** your high school has secured in the 2009-2010 academic year. _____
12. Please provide the approximate dollar amount in **non-JJF Initiative capital project payments** your high school has deposited in the 2009-2010 academic year.

13. I believe that my high school will meet its **JJF Initiative endowment pledge** benchmark for 2010-2011.
 - Yes
 - No
 - Unsure

14. I believe that my high school will meet its **JJF Initiative payments-due** benchmark for 2010-2011.

- Yes
- No
- Unsure

15. I believe that my high school has a well-developed JJF Initiative Development Action Plan.

- Yes
- No
- Unsure

16. I believe that my high school will be able to reach its JJF Initiative Development Action Plan goals.

- Yes
- No
- Unsure

17. Please list your school's fundraising action steps (if applicable, please include counts; e.g. number of meetings held):

Thank you for taking the time to complete the survey. Your answers will be invaluable in ensuring that the Jim Joseph Foundation High School Affordability Initiative is a success.

If you have any questions, please contact Jessica Brauner at jbrauner@eticonsulting.org.

Thank you!

**Jim Joseph Foundation High School Affordability Initiative
Fundraising Progress Interview Protocol
Quarter Two**

Thank you so much for taking the time to speak with me about _____'s fundraising activities. Your feedback will help the Jim Joseph Foundation and the Bureau of Jewish Education ensure that the fundraising efforts for the Jim Joseph Foundation High School Affordability Initiative are a success.

Questions 1-4 will be asked of staff who answered "no" or "unsure" to survey questions about endowment progress and their JJF Development Action Plan questions 12-15 on the survey).

First, I want to follow-up with some of the questions that you completed on the online survey.

1. You checked that you did not think your high school would meet its JJF Initiative endowment pledge benchmark for 2010-2011. Why do you think your high school may not meet the benchmark? What needs to happen so that your high school will be successful in meeting its benchmark?
2. You checked that you did not think your high school would meet its JJF Initiative payments-due benchmark for 2010-2011. Why do you think your high school may not meet the benchmark? What needs to happen so that your high school will be successful in meeting its benchmark?
3. You checked that you did not think your high school has a well-developed JJF Development Action Plan. What aspects of the plan do you think are not well developed? Do you have suggestions for how the plan could be improved?
4. You checked that you did not think your high school will be able to reach its JJF Development Action Plan goals. Which goals do you think your high school may not be able to reach? Do you have suggestions for how your high school can reach these goals?

Questions 5-8 will be asked of staff who answered "yes" to survey questions about endowment progress and their JJF Development Action Plan questions 12-15 on the survey).

First, I want to follow-up with some of the questions that you completed on the online survey.

5. You checked that you think your high school will meet its JJF Initiative endowment pledge benchmark for 2010-2011. What concrete steps has your team taken to ensure that your school will meet its benchmark?

6. You checked that your high school will meet its JJF Initiative payments-due benchmark for 2010-2011. What concrete steps has your team taken to ensure that your school will meet its benchmark?
7. You checked that you think your high school has a well-developed JJF Development Action Plan. What concrete steps did your team take that led to a well-developed Action Plan? Were there any specific strategies that your team employed?
8. You checked that you think your high school will be able to reach its JJF Development Action Plan goals. What concrete steps has your team taken to ensure that your school will meet its goals?

Now I'd like to talk to you about your school's fundraising action steps.

Ask questions 9-13 for each action step that was specified in their survey.

First, I'd like to discuss the action step _____.

9. What stage is your high school at in completing this action step – completed, in progress or not started?
10. *If completed or in progress*, What successful strategies did you employ to accomplish or make progress on this action step?
11. Did you encounter any obstacles? *If yes*, Can you describe them?
12. *If not completed*, When do you anticipate completing this action step?
13. *If not completed*, What conditions or changes, if any, need to take place in order to complete this action step?
14. Are there any other action steps that we did not go over? *If yes*, ask above questions.
15. In general, how closely does your high school follow its **JJF Development Action Plan**?
 - a. Do you think the plan is feasible?
 - b. What revisions are needed, if any?

Now I want to talk to you about the fundraising team.

16. Who created the fundraising team? Who determined who was going to be part of the team?
17. How often does your team meet?

18. What is your role on the fundraising team?
 - a. What are your responsibilities?
19. Please describe how the fundraising team members work together.
20. Please describe how the fundraising team operates.
 - a. Has the team experienced any challenges working together?
21. Please describe any **overall successes** your high school has experienced related to **JJF Initiative endowment fundraising** during the past quarter.
22. Please describe any **overall challenges** your high school has faced related to **JJF Initiative endowment fundraising** during the past quarter.
23. Please describe any **overall successes** your high school has experienced related to **non-JJF Initiative annual and capital fundraising** during the past quarter.
24. Please describe any **overall challenges** your high school has faced related to **non-JJF Initiative annual and capital fundraising** during the past quarter.
25. Is there anything else you want to add about your high school's **overall** fundraising efforts?

Thank you again for your time. Feel free to contact me at any time if you have any questions or if you think of anything else.

**Jim Joseph Foundation High School Affordability Initiative
Milken Fundraising Progress Interview Protocol
Quarter Three**

1. Have you finalized your Development Action Plan?
 - a. Can you email me a copy of it?
 - b. What steps have you taken?
 - i. Private campaign
 - ii. Personal solicitations
 - iii. Tiered and named funds
 - iv. Letter campaign
 - v. Two-line campaign
2. Have you secured or deposited any money to date?
 - a. Do you have a timeline for “asks” you plan to make? If yes, can you email it to me?
 - b. Do you have a timeline for getting deposits? If yes, can you email it to me?
3. Have you met with any potential donors?
 - a. Have you met with your “key potential donor” referred to in the letter sent to the BJE? If not, has a date been set? If so, what was the outcome?
 - b. Do you have a timeline for meeting with other donors?
4. Do you have a donor database?
5. What other support from the BJE would be helpful to ensure that Milken can successfully meet their fundraising benchmarks?
6. Is there anything else you want to add about Milken’s fundraising efforts?

**Jim Joseph Foundation High School Affordability Initiative
Shalhevet Fundraising Progress Interview Protocol
Quarter Three**

1. Do you think that the closing of the lower school has impacted the school's actions related to the Initiative? If so, how?
2. Have you finalized your Development Action Plan?
 - a. What steps are included in the plan?
3. Besides the \$167,667 that you have secured, have you secured or deposited any money to date from other donors?
 - a. Do you have a timeline for "asks" you plan to make? If yes, can you email it to me?
 - b. Do you have a timeline for getting deposits? If yes, can you email it to me?
4. Have you met with any potential donors?
 - a. Do you have a timeline for doing so?
5. Has Shalhevet worked on "branding" the school?
 - a. What is the status?
 - b. Do you have an anticipated date of when it will be finalized?
6. Have you communicated with parents regarding the Initiative and endowment goals?
 - a. What types of communications have you had?
7. What is the status of your donor database?
 - a. Do you have a projected target date that it will be up and running?
8. What other support from the BJE would be helpful to ensure that Shalhevet can successfully meet their fundraising benchmarks?
9. Is there anything else you want to add about Shalhevet's fundraising efforts?

**Jim Joseph Foundation High School Affordability Initiative
YULA Fundraising Progress Interview Protocol
Quarter Three**

1. Have you secured or deposited any money to date?
 - a. Do you have a timeline for “asks” you plan to make? If yes, can you email it to me?
 - b. Do you have a timeline for getting deposits? If yes, can you email it to me?
2. You mentioned that YULA was going to target donors with capital who are currently donating to the school. Have you targeted any of these donors? If not, do you have a timeline for doing so?
3. Have you targeted any other donors to ask for money?
 - a. Do you have a timeline for doing so?
4. What is the status of the creation of a board for fundraising?
 - a. Do you have a projected target date of when one will be created?
5. What is the status of your donor database?
 - a. Do you have a projected target date that it will be up and running?
6. What is the status of YULA’s community awareness campaign?
7. What is the status of your work with the marketing consultant to target parents?
8. Has there been better clarity in defining the partnership between you and YULA staff?
9. What other support from the BJE would be helpful to ensure that YULA can successfully meet their fundraising benchmarks?
10. Is there anything else you want to add about YULA’s fundraising efforts?

**Jim Joseph Foundation High School Affordability Initiative
Milken Fundraising Interview Protocol
Quarter Four**

Thank you so much for taking the time to speak with me about Milken's fundraising activities.

I would like to record our discussion so that I can be sure to accurately capture your comments.

Benchmark Pledges due June, 2011: \$750,000

Amount Pledged to date to the JJFHSA Endowment: None yet

Benchmark Deposits due June, 2011: \$750,000

Amount Deposited to date to the JJFHSA Endowment: None yet

1. How long have you been at your current position at Milken?
2. Who is on the fundraising team? (including professionals and lay leaders)
 - a. What are their names and positions?
3. Do you have a separate endowment committee?
 - a. Who is on it/who will be on it?
 - b. When do you anticipate it will be formed?
4. Have you finalized the JJF Development Action Plan with the committee?
5. What has been your role on the fundraising team throughout this school year?
 - a. Has it changed throughout the year?
6. Please describe how the fundraising team members worked together.
 - a. How often did the team meet this school year?
7. What is the status of Milken's new donor database?
8. Have you secured or deposited any money to date?
 - a. What is the status of securing \$1M from your major donor?
 - b. Do you have a timeline for "asks" you plan to make?
 - c. Do you have a timeline for getting deposits?
9. What action steps have you taken this year towards building the endowment?
 - a. Which action steps were most successful?
10. How many key and major donors have you met with?

11. What is the status of the endowment brochure? When do you expect it to be completed?
12. Have you encountered any challenges in working towards meeting your fundraising benchmarks?
 - a. Do you have plans to overcome these challenges?
13. What challenges do you think you will encounter in the future?
 - a. How do you think these can be overcome?
14. Do you think that the 2010-2011 Development Action Plan is feasible? *If no*, why not?
15. What action steps are you planning on taking next year?
16. Did Milken experience any growth in non-JJF fundraising development?
 - a. Do you think Milken's participation in the Initiative affected Milken's overall fundraising capacity?
17. What type of support has the BJE staff provided your school in relation to fundraising?
18. What other support would be helpful from the BJE?
19. Do you think that the JJFHSAI consortium meetings have been effective in helping your school be more successful in meeting your fundraising benchmarks? How could they be improved?
20. Did you attend any of the fundraising seminars held by the BJE?
 - a. *If yes*, were they effective in helping your school be more successful in meeting your fundraising benchmarks?
 - b. How could they be improved?
 - c. *If no*, Why not?
21. Do you have stronger relationships with other high schools as a result of participating in the community meetings or seminars?
22. Is there anything else you want to add about your high school's overall fundraising efforts or the Initiative?

Thank you again for your time. Feel free to contact me at any time if you have any questions or if you think of anything else.

**Jim Joseph Foundation High School Affordability Initiative
NCJHS Fundraising Interview Protocol
Quarter Four**

Thank you so much for taking the time to speak with me about NCJHS's fundraising activities.

I would like to record our discussion so that I can be sure to accurately capture your comments.

Benchmark Pledges due June, 2011: \$750,000

Amount Pledged to date to the JJFHSA Endowment: \$925,000

Benchmark Deposits due June, 2011: \$250,000

Amount Deposited to date to the JJFHSA Endowment: \$262,179

1. How long have you been in that position at the school?
2. Who is on the fundraising team? (including professionals and lay leaders)
 - a. What are their names and positions?
 - b. Has the composition changed?
3. Do you have a separate endowment committee?
 - a. Who is on it?
4. What has been your role on the fundraising team throughout this school year?
 - a. Has your role changed?
5. How often did the team meet this school year?
6. Please describe how the fundraising team members worked together.
7. As of June 10, you have secured \$925,000 and deposited \$262,179. Have you secured or deposited any more money since June 10?
8. What major action steps did you complete to meet the benchmarks?
9. Which action steps were most successful?
10. Did you encounter any challenges in meeting your fundraising benchmarks?
 - a. What challenges do you anticipate experiencing in meeting future fundraising benchmarks?
 - b. Do you have any recommendations of how these can be addressed?

11. Did you follow the JJF Development Action Plan that was created in the beginning of the school year?
 - a. Have any revisions been made? (Shift focus to capital fundraising?)
 - b. Did the plan help NCJHS reach its fundraising goals?
12. Do you think that the 2010-2011 Development Action Plan is feasible? *If no*, why not?
13. What action steps are you planning on taking next year?
14. Did NCJHS experience any growth in non-JJF fundraising development?
 - a. Do you think your participation in the Initiative affected the school's overall fundraising capacity?
15. What type of support has the BJE staff provided your school in relation to fundraising?
16. What other support would be helpful from the BJE?
17. Do you think that the JJFHSAI consortium meetings have been effective in helping your school be more successful in meeting your fundraising benchmarks? How could they be improved?
18. Did you attend any of the fundraising seminars held by the BJE?
 - c. *If yes*, were they effective in helping your school be more successful in meeting your fundraising benchmarks?
 - d. How could they be improved?
 - e. *If no*, Why not?
19. Do you have stronger relationships with other high schools as a result of participating in the community meetings or seminars?
20. Is there anything else you want to add about your high school's overall fundraising efforts or the Initiative?

Thank you again for your time. Feel free to contact me at any time if you have any questions or if you think of anything else.

**Jim Joseph Foundation High School Affordability Initiative
Shalhevet Fundraising Interview Protocol
Quarter Four**

Thank you so much for taking the time to speak with me about Shalhevet's fundraising activities. I would like to record our discussion so that I can be sure to accurately capture your comments.

Benchmark Pledges due June, 2011: \$500,000

Amount Pledged to date to the JJFHSA Endowment: None yet

Benchmark Deposits due June, 2011: \$167,667

Amount Deposited to date to the JJFHSA Endowment: None yet

1. Have you experienced any impacts of the closing of the lower school?
2. Has the resignation of Rabbi Weinbach affected the Initiative? How?
3. How long have you been in your position at the school?
4. Who is on the fundraising team? (including professionals and lay leaders)
 - a. What are their names and positions?
5. Do you have a separate endowment committee?
 - a. Who is on it?
6. What have been your roles on the fundraising team throughout this school year?
 - a. Have your roles changed?
7. Please describe how the fundraising team members worked together.
 - a. How often did the team meet this school year?
8. What is the status of Shalhevet's revised JJF Development Action Plan?
9. Have you secured or deposited any money to date?
 - a. Have you met with potential donors?
 - b. Do you have a timeline for "asks" you plan to make?
 - c. Do you have a timeline for getting deposits?
10. What action steps have you taken this year towards building the endowment?
 - a. Which action steps were most successful?
11. Was the Gala successful in raising the expected amount of money?
12. What is the status of meeting with potential donors?

13. What is the status of communicating with Shalhevet's parent base?
14. What is the status of rebranding the school?
15. What is the status of the creation of the fundraising materials?
16. Did Shalhevet experience any growth in non-JJF fundraising development?
 - a. Do you think Shalhevet's participation in the Initiative affected Shalhevet's overall fundraising capacity?
17. Have you encountered any challenges in working towards meeting your fundraising benchmarks?
 - a. Do you have plans to overcome these challenges?
18. Do you think that the 2010-2011 Development Action Plan is feasible? *If no*, why not?
19. What action steps are you planning on taking next year?
20. What challenges do you anticipate experiencing in meeting future fundraising benchmarks?
 - a. Do you have any recommendations of how these can be addressed?
21. What type of support has the BJE staff provided your school in relation to fundraising?
22. What other support would be helpful from the BJE?
23. Do you think that the JJFHSAI consortium meetings have been effective in helping your school be more successful in meeting your fundraising benchmarks? How could they be improved?
24. Did you attend any of the fundraising seminars held by the BJE?
 - a. *If yes*, were they effective in helping your school be more successful in meeting your fundraising benchmarks?
 - b. How could they be improved?
 - c. *If no*, Why not?
25. Do you have stronger relationships with other high schools as a result of participating in the community meetings or seminars?
26. Is there anything else you want to add about your high school's overall fundraising efforts or the Initiative?

Thank you again for your time. Feel free to contact me at any time if you have any questions or if you think of anything else.

**Jim Joseph Foundation High School Affordability Initiative
YULA Fundraising Interview Protocol
Quarter Four**

Thank you so much for taking the time to speak with me about YULA's fundraising activities. I would like to record our discussion so that I can be sure to accurately capture your comments.

Boys and Girls

Benchmark Pledges due June, 2011: \$250,000

Amount Pledged to date to the JJFHSA Endowment: None yet

Benchmark Deposits due June, 2011: \$83,333

Amount Deposited to date to the JJFHSA Endowment: None yet

1. How long have you been at your current position at YULA?
2. What is the status of the merging of the school boards?
 - a. Who is on it/who will be on it?
 - b. When do you anticipate it will be formed?
3. What impact do you think this will have on the endowment campaign?
4. Who is on the fundraising team? (including professionals and lay leaders)
 - a. What are their names and positions?
5. Do you have a separate endowment committee?
 - a. Who is on it?
6. Was your JJF Development Action Plan revised this year? How?
7. What has been your role on the fundraising team throughout this school year?
 - a. Has your role changed?
8. Please describe how the fundraising team members worked together.
 - a. How often did the team meet this school year?
9. Have you secured or deposited any money to date?
 - a. What is the status of securing money from the board chairs and endowment chairs?
 - b. Do you have a timeline for "asks" you plan to make?
 - c. Do you have a timeline for getting deposits?
10. What action steps have you taken this year towards building the endowment?
 - a. Which action steps were most successful?

11. Did you have the kick-off event with key donors?
12. What is the status of the alumni development?
13. Did YULA experience any growth in non-JJF fundraising development?
 - a. Do you think YULA's participation in the Initiative affected YULA's overall fundraising capacity?
14. Have you encountered any challenges in working towards meeting your fundraising benchmarks?
 - a. Do you have plans to overcome these challenges?
15. Do you think that the 2010-2011 Development Action Plan is feasible? *If no, why not?*
16. What action steps are you planning on taking next year?
 - a. Parent and staff solicitations
17. What challenges do you anticipate experiencing in meeting future fundraising benchmarks?
 - a. Do you have any recommendations of how these can be addressed?
18. What type of support has the BJE staff provided your school in relation to fundraising?
19. What other support would be helpful from the BJE?
20. Do you think that the JJFHSAI consortium meetings have been effective in helping your school be more successful in meeting your fundraising benchmarks? How could they be improved?
21. Did you attend any of the fundraising seminars held by the BJE?
 - a. *If yes, were they effective in helping your school be more successful in meeting your fundraising benchmarks?*
 - b. How could they be improved?
 - c. *If no, Why not?*
22. Do you have stronger relationships with other high schools as a result of participating in the community meetings or seminars?
23. Is there anything else you want to add about your high school's overall fundraising efforts or the Initiative?

Thank you again for your time. Feel free to contact me at any time if you have any questions or if you think of anything else.

APPENDIX B

**Jim Joseph Foundation High School Affordability Initiative
Consortium Meeting Survey
February 18, 2010**

This survey is to be completed by the JJFHSAI project team staff of each high school. Thank you for your help!

1. Please select the organization with which you are affiliated:

- | | |
|---|---|
| <input type="checkbox"/> Milken Community High School
<input type="checkbox"/> New Community Jewish High School
<input type="checkbox"/> Shalhevet High School
<input type="checkbox"/> YULA Girls High School | <input type="checkbox"/> YULA Boys High School
<input type="checkbox"/> Jewish Federation of Greater LA
<input type="checkbox"/> BJE
<input type="checkbox"/> Other: (please specify)_____ |
|---|---|

2. What is your title/position?

- | | |
|--|---|
| <input type="checkbox"/> Head of School
<input type="checkbox"/> Board president or representative
<input type="checkbox"/> Admissions staff
<input type="checkbox"/> Development/Advancement staff | <input type="checkbox"/> Marketing staff
<input type="checkbox"/> Jewish Federation staff
<input type="checkbox"/> BJE staff
<input type="checkbox"/> Other: (please specify)_____ |
|--|---|

3. I attended the: *(check all that apply)*

- March 2009 JJFHSAI consortium meeting
- September 2009 JJFHSAI consortium meeting
- February 2010 JJFHSAI consortium meeting

4. Please rate your level of agreement with the following statements about previous consortium meetings. If you did not attend the meeting please check "I did not attend this meeting."

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	I did not attend this meeting
After the March 2009 JJFHSAI consortium meeting, I understood the vision for the JJFHSAI.	<input type="checkbox"/>				
After the March 2009 JJFHSAI consortium meeting, I understood how the JJFHSAI will be implemented for the LA community.	<input type="checkbox"/>				
After the March 2009 JJFHSAI consortium meeting, I understood how the JJFHSAI will be implemented at my school.	<input type="checkbox"/>				
The September 2009 JJFHSAI consortium meeting allowed me to give input about how to change/expand the JJFHSAI in the area of public relations.	<input type="checkbox"/>				
The September 2009 JJFHSAI consortium meeting allowed me to give input about how to change/expand the JJFHSAI in the area of student selection.	<input type="checkbox"/>				

5. Please rate your level of agreement with the following statements about the consortium meetings.

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
The JJFHSAI consortium meetings have been a good forum to learn about what other schools are doing regarding the JJFHSAI.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Learning what other schools are doing is helping my high school be more successful in implementing the JJFHSAI.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The JJFHSAI consortium meetings are informative.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The JJFHSAI consortium meetings are conducted effectively.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I think the JJFHSAI consortium meetings have created a collaborative process within my school's JJFHSAI team for implementing the JJFHSAI.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I think the JJFHSAI consortium meetings have created a collaborative process across schools for implementing the JJFHSAI.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The JJFHSAI consortium meetings cover topics that are relevant for my high school.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Please use the space below to provide an explanation for any responses to which you disagreed.				

6. What topics would you like to see presented or discussed during future meetings?

7. Is there anyone else who you think should be attending the consortium meetings? If yes, whom? _____

8. Do you think that the JJFHSAI consortium meets:

- Too often Not often enough The right amount

9. Do you have any other feedback or comments about the JJFHSAI consortium meetings?

Thank you for taking the time to complete the survey. Your answers will be invaluable in ensuring that the Jim Joseph Foundation High School Affordability Initiative is a success.

APPENDIX C

**Jim Joseph Foundation High School Affordability Initiative
Building Endowments Seminar Survey
April 22, 2010**

Please complete this survey about today's Building Endowments Seminar.

Thank you for your help!

1. Please select the organization with which you are affiliated:

- Milken Community High School
- New Community Jewish High School
- Shalhevet High School
- YULA High School

2. Please rate your level of agreement with the following statements about the seminar.

During the seminar I gained introductory information about...	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
The Jewish Community Foundation including available resources and planned giving vehicles.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Building a planned giving campaign.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Finding donors who can contribute to my school's endowment campaign.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Targeting donors who can contribute to my school's endowment campaign.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reinforcing my school's endowment message.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recognizing donors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Building stewardship.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resolving Board issues.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Training staff to support endowment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Software and research that I can use to improve my school's endowment campaign.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Setting goals for my school's endowment campaign.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Different strategies to build my school's endowment including professional advisors and seminars.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please use the space below to provide any additional comments.

3. Please rate your level of agreement with the following statements about the seminar.

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
The speaker effectively conveyed the topics that were presented.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The speaker effectively answered participants' questions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The seminar was informative.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The seminar was conducted effectively.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The seminar covered topics that are relevant for my high school's endowment campaign.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
What I learned today at the seminar will help me make my school's endowment campaign more successful.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Please use the space below to provide any additional comments.				

4. What was the most helpful thing you learned during the seminar?

5. What other information, resources, or other seminars would you like to help your school meet its fundraising benchmarks?

6. Do you have any other feedback or comments about today's seminar?

Thank you for taking the time to complete the survey. Your answers will be invaluable in ensuring that the Jim Joseph Foundation High School Affordability Initiative is a success.

**Jim Joseph Foundation High School Affordability Initiative
Fundraising Strategies in Difficult Economic Times Survey
May 26, 2010**

Please complete this survey about today's Fundraising Seminar. Thank you for your help!

1. Please select the school with which you are affiliated:

- | | |
|---|--|
| <input type="checkbox"/> Milken Community High School | <input type="checkbox"/> Shalhevet High School |
| <input type="checkbox"/> New Community Jewish High School | <input type="checkbox"/> YULA High School |

2. Please rate your level of agreement with the following statements about the seminar.

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
The speaker effectively conveyed the topics that were presented.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The speaker effectively answered participants' questions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The seminar was informative.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The seminar was conducted effectively.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The seminar covered topics that are relevant for my high school's fundraising campaign.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
What I learned today at the seminar will help me make my school's fundraising campaign more successful.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
During the seminar I learned about strategies for successful fundraising.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Please use the space below to provide any additional comments.				
<hr style="border: 0; border-top: 1px solid black; margin-bottom: 5px;"/> <hr style="border: 0; border-top: 1px solid black;"/>				

3. What was the most helpful thing you learned during the seminar?

4. What other information, resources, or other seminars would you like to help your school meet its fundraising benchmarks?

5. Do you have any other feedback or comments about today's seminar?

Thank you for taking the time to complete the survey. Your answers will be invaluable in ensuring that the Jim Joseph Foundation High School Affordability Initiative is a success.

APPENDIX D

**Jim Joseph Foundation High School Affordability Initiative
JJFHSAI School Staff Interview Protocol**

Thank you so much for taking the time to speak with me about the JJFHSAI. I would like to record our discussion so that I can be sure to accurately capture your comments.

1. Did your responsibilities change after the Jim Joseph Initiative was implemented at your school?
 - a. When in the school year did you join the JJF enrollment process?
 - b. Were you reasonably able to fulfill all of the responsibilities you had this year?
 - c. What can be done to ensure that you can do so next year?
2. Did any other staff play a role in the JJF recruitment or enrollment process (e.g. admissions staff)?
3. In your opinion, what has been the impact the Initiative has had on your school?
 - a. Student composition (more middle-income families)
 - b. School organization (e.g. new staff, new staff responsibilities)
4. What type of support has the BJE staff provided your school in relation to the admissions or financial aid process?
5. What other support would be helpful from the BJE?
6. Have you attended any of the JJFHSAI consortium meetings?
 - a. *If yes*, Have they been effective in helping your school be more successful in implementing the Initiative? How could they be improved?
 - b. *If no*, Why not?
7. Do you think that the marketing campaign was successful in recruiting students to your high school?
 - a. Students from public schools?
 - b. Students from Jewish schools?
 - c. Students from private schools?
 - d. Did you use any other means of recruitment for this Initiative? What?
8. What additional ideas would you have to improve the marketing campaign for student recruitment?
9. Did your school encounter any challenges in meeting your JJF enrollment benchmarks?

10. Were you able to provide sufficient financial aid to all of the students who completed an online application who were not eligible for JJF funds, but were eligible for other financial aid? *If no, why not?*
11. Please describe your school's enrollment process for new and continuing students who applied for the JJF funds.
 - a. How could this process be improved?
12. Did your school encounter any other challenges related to the Initiative?
13. Do you have any recommendations for how the Initiative could be improved?
 - a. Website
14. Do you have anything else that you would like to add about the Initiative?

Thank you again for your time. Feel free to contact me at any time if you have any questions or if you think of anything else.

APPENDIX E

**Jim Joseph Foundation High School Affordability Initiative
Heads of School Interview Protocol**

We would like to talk to you about the Jim Joseph Foundation High School Affordability Initiative to get your feedback about the different components of the Initiative as well as any recommendations you may have to improve the Initiative.

I would like to record our discussion so that I can be sure to accurately capture your comments.

1. What has been the main impact the Initiative has had on your school?
2. Has the Initiative had any other impacts on your school?
 - a. Student composition (more middle-income families)
 - b. School organization (e.g. new staff, new staff responsibilities)
 - c. Implementation of an endowment
3. What type of support has the BJE staff provided your school?
 - a. Has this support been sufficient to successfully implement the Initiative?
4. What other support would be helpful from the BJE?
 - a. Other seminars/meetings
 - b. Materials
5. Have you attended any of the Jim Joseph community meetings?
6. Do you have stronger relationships with other high schools as a result of participating in the community meetings?
7. Have the Jim Joseph community meetings been effective in helping your school be more successful in implementing the Initiative?
8. Do you have any recommendations of how the community meetings could be improved?
 - a. Other topics
 - b. Format
9. Do you think that the marketing campaign (e.g. postcards, ads) was successful in recruiting students to your high school?
10. How could the Jim Joseph Foundation better promote the Initiative?

11. Did your school encounter any challenges in meeting your enrollment or fundraising benchmarks?
12. Did your school encounter any other challenges related to the Initiative?
13. Do you have any recommendations for how the Initiative could be improved?
 - a. Website
 - b. Enrollment process
14. Do you have anything else that you would like to add about the Initiative?

APPENDIX F

**Jim Joseph Foundation High School Affordability Initiative
Parent BJE Website Survey**

1. How did you hear about this website? (Choose all that apply)
 - Word of Mouth
 - Mailed Postcard
 - Print Advertisement
 - Other Advertisement
 - Jewish High School
 - Jewish Middle School
 - Non-Jewish Middle School
 - Non-Jewish High School
 - Synagogue
 - Youth Group
 - Camp
 - BJEla.org Web Site
 - Other- Please Specify

2. Rate your level of interest in the Jim Joseph Foundation High School Affordability (JJFHSA) grant, from **1** (somewhat interested) to **5** (extremely interested).
 - (drop down menu from 1 to 5)

3. Were you planning to send your child to a Jewish High School in 2010-2011 before learning about the JJFHSA grant?
 - Yes
 - No
 - Undecided

4. What is your child's previous Jewish education? (Choose all that apply)
 - Religious School – years _____
 - Day School – years_____
 - Schooled in Israel – years____
 - Child Raised in Hebrew Speaking Home - years _____
 - None

5. Please choose the main factor(s) that would have prevented you from enrolling your child in a Jewish high school. (Choose all that apply)
 - Financial Issues
 - Child's Limited Jewish Background
 - Child's Limited Hebrew Background
 - Distance to the School
 - None- There are no reasons that would prevent me from enrolling my child
 - Other – Please specify

6. Family Data:

- Parent/Guardian 1
 - Age
 - Zip code
- Parent/Guardian 1
 - Age
 - Zip code
- Prospective Jewish high school student(s)
 - Applicant 1
 - Current school
 - Grade during 2010-2011 school year
 - First choice of high school to attend
 - Second choice of high school to attend
 - Third choice of high school to attend
 - Applicant 2
 - Current school
 - Grade during 2010-2011 school year
 - First choice of high school to attend
 - Second choice of high school to attend
 - Third choice of high school to attend
- Siblings of applicant(s)
 - Sibling 1
 - Current school
 - Grade during 2010-2011 school year
 - Tuition, if any
 - Amount paid from all resources other than financial aid (e.g., parents, grandparents)
 - Sibling 2
 - Current school
 - Grade during 2010-2011 school year
 - Tuition, if any
 - Amount paid from all resources other than financial aid (e.g., parents, grandparents)
 - Sibling 3
 - Current school
 - Grade during 2010-2011 school year
 - Tuition, if any
 - Amount paid from all resources other than financial aid (e.g., parents, grandparents)
 - Sibling 4
 - Current school
 - Grade during 2010-2011 school year
 - Tuition, if any
 - Amount paid from all resources other than financial aid (e.g., parents, grandparents)

- Parents' Income Data
 - Parent 1
 - Annual income from all sources – year ending December, 2008 (actual)
 - Annual income from all sources – year ending December, 2009 (projected)
 - Parent 2
 - Annual income from all sources – year ending December, 2008 (actual)
 - Annual income from all sources – year ending December, 2009 (projected)
- Amount of high school tuition you are able to pay for each applicant
- Would you like a representative from your first choice school to contact you? If “Yes,” please provide your email and/or telephone number
 - Email
 - Telephone
 - Name

7. Result of status

- JJFHSA
- SFA
- UEC

8. Submitted application

- Yes
- No

9. Returning Student

- Yes
- No

APPENDIX G

**Jim Joseph Foundation High School Affordability Initiative
Parent Marketing Survey**

The goal of the Jim Joseph Foundation (JJF) High School Affordability Initiative is to increase the attendance of Jewish families in Jewish Day School by making Jewish high schools more affordable to Jewish families. To accomplish this goal and to help improve the process, we need feedback from parents who completed the application through the Jim Joseph website. Your feedback is vital to ensure that this Initiative is a success.

After you complete the survey, we will email you a \$10 gift certificate to Amazon.com as a token of our appreciation. Please complete the survey by **June 13, 2010**.

The survey, which consists of 15 questions, will take approximately **5-10 minutes of your time**. Please complete the survey about the child(ren) for whom you completed the online application. **Your answers will be kept completely confidential.**

Thank you!

1. Is your child(ren) going to be enrolled in one of the 5 high schools participating in the Initiative (Yula, Shalhevet, Milken, or New Community Jewish High School) in the **2010-2011** academic year?
 - a. Yes (*opt out of survey*)
 - b. No (*go to Q1*)
 - c. Undecided (*go to Q1*)

What type of school will your child(ren) be enrolled in for the **2010-2011** academic year?

2. **Child One:**
 - a. Other Jewish high school
 - b. Private high school (non-Jewish)
 - c. Public high school
 - d. Home/online schooling
 - e. Undecided
 - f. Other (*please specify*): _____
3. **Child Two: (if applicable)**
 - a. Other Jewish high school
 - b. Private high school (non-Jewish)
 - c. Public high school
 - d. Home/online schooling
 - e. Undecided
 - f. Other (*please specify*): _____

4. How did you hear about the Jim Joseph website? *(check all that apply)*
 - a. The Acorn
 - b. Jewish Journal
 - c. Beverly Hills Courier
 - d. Tribe
 - e. Performance Magazine (at the Philharmonic or Theatre)
 - f. Laemmle Theatre on-screen advertisement
 - g. Postcard
 - h. Jewish high school
 - i. Jewish middle school
 - j. Word of mouth (e.g. friend)
 - k. Synagogue
 - l. BJEIa.org website
 - m. Other *(please specify)*:

5. How soon after you completed the online application did you receive a call or email from the first school of your choice?
 - a. 1-3 days
 - b. 4-7 days
 - c. 2 weeks
 - d. Over 2 weeks
 - e. Never

6. Were you (or your child) invited by your first choice school to visit or attend an open house?
 - a. Yes
 - b. No

7. Did you (or your child) visit the school or attend an open house?
 - a. Yes
 - b. No *(please explain why not)*:

8. If you visited the school, was the visit a positive experience? Why or why not?

9. Did you (or your child) participate in an interview with one of the school administrators?
 - a. Yes
 - b. No *(please explain why not)*:

10. If you (or your child) participated in an interview, with whom did you meet? Was it a positive experience? Why or why not?

11. If you were contacted by one of the **other** schools participating in the Initiative, did you visit the school, attend an open house, or participate in an interview? If so, was it a positive experience? Why or why not?

12. Were you offered financial aid from any of the schools participating in the Initiative? *(check all that apply)*
- a. Yes, I was offered a Jim Joseph subsidy grant
 - b. Yes, I was offered a different financial package
 - c. No, I wasn't offered any financial aid
13. If your child(ren) will not be enrolled in one of the high schools participating in the Initiative for the 2010-2011 academic year, what was the primary reason?
14. If your child(ren) will not be enrolled in a Jewish high school for the 2010-2011 academic year, what type of assistance or support would be necessary for you to do so?
15. Please provide any additional comments you would like to add about the Initiative.

If you want us to send the Amazon gift certificate to a different email address than the one to which you received this survey, please provide it here.

Thank you again for your time. Your feedback is greatly appreciated. If you have any questions please contact Jessica Brauner at jbrauner@eticonsulting.org or at 310-473-8367, extension 33.

APPENDIX H

**Jim Joseph Foundation High School Affordability Initiative
Parent Marketing Interview Protocol**

Thank you so much for taking the time to speak with me about the Jim Joseph Foundation High School Affordability Initiative. Your feedback will help the Jim Joseph Foundation and the BJE ensure that this Initiative is a success.

I would like to record our discussion so that I can be sure to accurately capture your comments. As a reminder, the interview is completely confidential; I do not have any record of you or your child's name. Do you have any questions before we begin?

Background

1. What is your ID?
2. What type of school was your child enrolled in last year? (e.g. public, private)
3. *If in 10th-12th grade and newly enrolled, Why did they transfer to _____ ?*

Marketing

4. How did you hear about the Initiative?
 - a. *If newspaper, Which newspaper (The Acorn, Jewish Journal, Beverly Hills Courier)?*
 - b. *If magazine, Which magazine (Tribe, Performance Magazine)?*
 - c. *If Laemmle, Which theater?*
 - d. *If from someone else, Do you know how they heard about the Initiative?*
5. Did you see the Initiative advertised anywhere/anywhere else?
6. Did you tell anyone else about the Initiative?
 - a. Do you know if they applied for the Initiative?
7. Do you think that *(insert which marketing saw)* was/were an effective way to make people aware of and interested in the Initiative? *Skip if didn't see the Initiative marketed anywhere*
8. How could the Jim Joseph Foundation better promote the Initiative?
 - a. Use of different marketing tools
 - b. Target a different population/area
9. Did you have any difficulties completing the online application on the website?
10. How could the website application be improved?

Enrollment Process

11. *Don't ask if child was already enrolled in the school before hearing about the Initiative from the school.* How soon after you completed the online application did you receive a call or email from the school of your choice?
 - a. Did you contact another school? *If so, ask questions 11-12 about each school*
12. Were you or your child(ren) invited to visit the school or to an open house?
 - a. Did you or your child(ren) visit or attend an open house?
 - b. Can you please describe your visit? What happened during your visit?
13. Did you attend a follow-up meeting with school personnel? Can you please describe the meeting?
 - a. Who was in the meeting?
 - b. What did they talk about?
14. Did you encounter any difficulties during the school's financial screening process?
15. Do you have any recommendations to improve the school's financial screening process?
16. Do you have any recommendations to improve the enrollment process?

Reasons for and Barriers to Enrollment

17. What was the primary reason you decided to enroll your child(ren) in ____?
18. Would you have enrolled your child(ren) in a Jewish High School if you did not receive the Jim Joseph Foundation grant? Why or why not?
19. Do you have anything else that you would like to add about the Initiative?

Thank you again for your time. We really appreciate your feedback.