

Jewish Federations of North America

Federation Jewish Day School Funding Models

A Look at Models for Annual Allocations to Jewish Day Schools

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Federation Day School Funding Models

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Introduction

Since 1949, when the Jewish Federation of Cleveland first allocated funds to a Jewish day school, Jewish Federations across North America have been key supporters of the day schools serving their communities. This report looks at the models that Jewish Federations are using to allocate funds, award grants and review the impact of the Jewish day schools they support. For the purpose of this report, “annual funding” refers only to funding provided to day schools from Federations’ annual allocations, and does not include any other source of Federation funding.

This study was conducted by the Planning and Research Department of The Jewish Federations of North America, in collaboration with JFNA’s office of Jewish Education and Engagement, with the goal of identifying trends and sharing findings related to Federation models of funding Jewish day schools. The data included in the report are based on a survey of Jewish Federations about their day school funding models as well as a review of reports on day school funding over the last two decades. The survey was developed based on consultation with professionals in the Jewish Federation and Jewish day school arena and was disseminated in May 2017 to 148 Federations; responses were encouraged and collected through December 2017. At the end of the field period, 132 Federations had provided data, for a response rate of 89%. See Appendix 1 for a list of the respondent Federations.

The first question in the survey established whether the respondent Federations had day schools in their communities. Of the 132 Federations who participated in the survey, 36% (N=47) reported that they did not have day schools in their service areas. The remaining questions did not pertain to them and they were skipped to the end of the survey. Therefore, for all subsequent questions, the highest number of respondents is 85, representing the respondent Federations that have day schools. However, respondents did not answer every query, which resulted in varying rates of data availability from question to question. Throughout the report, the number of responses to each question is indicated in the text and the tables in the related sections.

Note that due to the large number of Jewish day schools and yeshivot in the New York metropolitan area and the unique funding model of UJA-Federation of New York for day schools, data in this report pertaining to number of schools, enrollment and Federation funding does not include New York. Their responses are, however, included in qualitative data. See appendix 5 for a summary of UJA-Federation of New York funding to day schools.

If you are interested in information regarding Federation grant-making / allocations processes, please contact Joy Goldstein, Associate Vice President for Planning and Research at joy.goldstein@jewishfederations.org.

Executive Summary

- 73 Federations invested **\$52.3 million in 301 Jewish day schools** in 2015-2016.
- On average, respondent Federations allocated **16% of their total local funding to day schools** in 2015-2016 – the same level as in 2006.
- 82 Federations reported **430 Jewish day schools** in their communities in 2015-2016: 63% of the schools are Orthodox, and 27% are Community schools. Conservative (7%) and Reform (3%) day schools comprise a relatively small percentage of Jewish day schools. Not all day schools receive funding from their Federations.
- **68,962 students** were enrolled in 254 Federation-funded Jewish day schools in 2015-2016.
- **40% of Federations use a per capita funding model.** The majority of large and large-intermediate Federations use this model.
- Federations are most likely to require funded day schools to **report on financial performance and impact.**



Findings

Jewish Day Schools in Federation Communities (N=132)

There are day schools in every size community. All large and large-intermediate Federations have day schools in their service areas, as do virtually all of the intermediate Federations. In contrast, just a quarter of small Federations have day schools in their communities.¹

Does your community have any Jewish day schools? (N=132)				
	Yes		No	
	% of Respondents	Number	% of Respondents	Number
Large	100%	18	0%	0
Large-Intermediate	100%	16	0%	0
Intermediate	95%	36	5%	2
Small	25%	15	75%	45
Total	64%	85	36%	47

Number of Schools (N=80)

Total Schools Reported (N=80)			
	# of Respondents	# of Schools	% of Total Schools
Large	17	222	52%
Large-Intermediate	16	89	21%
Intermediate	34	83	19%
Small	13	36	8%
Grand Total	80	430	100%

Respondent Federations reported a total of 430 schools in their communities. Almost three-quarters of the schools are in large and large-intermediate Federation communities.

Enrollment (N=66)

Total enrollment in Federation-funded Jewish day schools, as reported by 66 respondents, was 68,962 in 254 schools in 2015-2016. Most Federations do not collect enrollment data from schools in their communities that they do not fund.

Total Enrollment Reported (N=66)			
	# of Respondents	# of Students	% of Students
Large	15	47,731	69%
Large-Intermediate	12	13,886	20%
Intermediate	26	6,126	9%
Small	13	1,219	2%
Grand Total	66	68,962	100%

¹ Federations' city size is determined as follows:

Large – annual campaign of \$12M+ and Jewish population of 45,000+;

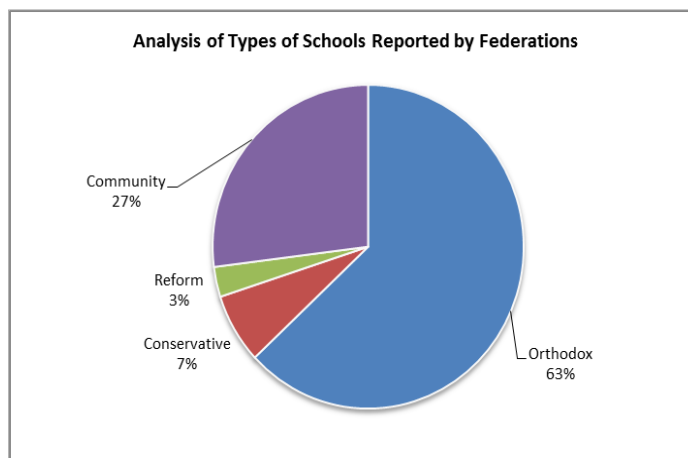
Large-intermediate – annual campaign of \$4M – under \$12M and Jewish population of 15,000 to under 45,000;

Intermediate – annual campaign of \$1M – under \$4M and Jewish population of 5,000 to under 15,000;

Small – annual campaign of less than \$1M and Jewish population of less than 5,000.

Types of Schools in Federation Communities

Of the 430 Jewish day schools in the respondent communities, the majority are Orthodox (63%), followed by Community schools (27%). Conservative (7%) and Reform (3%) day schools comprise a relatively small group of schools in the respondent Federation communities. This reflects a trend in the Jewish day school landscape, attributable to shifts in the Conservative movement and the strategic transformation of day schools from Conservative-based to Community-based missions.



Day Schools Funded by Federations (N=82)

Of the 430 schools reported by the respondents, 301 (70%) were funded by their Federations in fiscal year 2015-2016. Sixty-five percent (53) of the 82 respondents to the question reported that they fund all of the day schools in their communities. More than one-quarter (28%) of respondent large Federations funded all of the day schools in their service areas in 2015-2016. More than half (56%) of the respondent large-intermediate Federations provided funding to all of their day schools. Smaller communities are more likely to fund all of the schools in their regions, with 83% of intermediate Federations and 73% of small Federations reporting that all of the schools in their communities received funding in fiscal year 2015-2016.

Does your Federation fund all day schools in your service area? (N=82)		
	Yes	
	Percentage	Number
Large	28%	5
Large-Intermediate	56%	9
Intermediate	83%	29
Small	73%	11
Total	65%	53

Looking at the types of schools that receive funding, we find that 86% of the Community/Pluralistic schools and 92% percent of the reported Reform schools received Federation funding in fiscal year 2015-2016. Seventy-nine percent of Conservative schools and 61% of Orthodox schools received funding from their Federations that year. The following chart depicts how many of the day schools in Federation communities are Community, Reform, Conservative and Orthodox schools, and how many of each receive funding from the Federation.

How many of the schools in your Federation region are Orthodox, Conservative, Reform, or Community schools? For how many of each does the Federation provide funding?					
Type of School	Large Federations	Large-Intermediate Federations	Intermediate Federations	Small Federations	Total
Community Schools					
Total # of Schools	54	17	36	10	117
# Funded by Federation	46	13	34	8	101
% Funded by Federation	85%	76%	94%	80%	86%
Reform Schools					
Total # of Schools	9	2	1	0	12
# Funded by Federation	8	2	1	0	11
% Funded by Federation	89%	100%	100%	0	92%
Conservative Schools					
Total # of Schools	18	6	5	0	29
# Funded by Federation	13	6	4	0	23
% Funded by Federation	72%	100%	80%	0	79%
Orthodox Schools					
Total # of Schools	141	64	41	26	272
# Funded by Federation	92	44	28	2	166
% Funded by Federation	65%	69%	68%	8%	61%
Grand Total					
Total # of Schools	222	89	83	36	430
# Funded by Federation	159	65	67	10	301
% Funded by Federation	72%	73%	81%	28%	70%

Non-conformance with the Federations' funding guidelines is the reason most commonly cited for some schools not to receive funding. The following charts delineate the reasons Federations may not fund some schools in their communities.

Reasons Cited	# of Responses
School does not meet funding guidelines	13
School does not request funding	5
School is not open to everyone in the community	4
Lack of funds	2
While the school is located in the community, it does not serve the local community	2
School is too new and/or too small	2
Federation does not fund high schools	1
School is not a Federation beneficiary	1
Moratorium on funding new schools	1

Eligibility Guidelines Include:
<ul style="list-style-type: none"> • Governance requirements, e.g., school must have a local board • Philosophy / School must be open to the whole community • School must serve local community • Enrollment requirements • Pedagogical / quality requirements • School must be accredited by state • School must be accredited by Board of Jewish Education • Financial stability and transparency • Must have three years of operations and financial reporting

Total Funding to Day Schools (N=73)

Seventy-four Federations provided data on their 2015-2016 annual funding to day schools and their total local funding in the same year. These communities invested **\$52,282,358** in Jewish day schools in 2015-2016.² This funding represented, in aggregate, 16% of the total local funding for those Federations. There was not appreciable difference in the proportion of local funding that was awarded to day schools – from 15% on average in the large Federations to 20% in the small Federations. This level of funding represents only the support from the respondent Federations’ annual allocable pools.

Community Size	# Respondents	2015-2016 Funding to Day Schools	2015-2016 Total Local Funding	Average funding to day schools (as % of local allocations)	Range of funding to day schools (as % of total local allocations)	
					Minimum	Maximum
Large	16	\$37,758,138	\$246,603,056	15%	4%	33%
Large-Intermediate	14	\$6,847,945	\$38,160,798	17%	8%	35%
Intermediate	30	\$6,751,739	\$37,036,205	18%	2%	58%
Small	13	\$1,170,536	\$5,741,965	20%	4%	100%
Grand Total	73	\$52,282,358	\$327,542,024	16%		

In addition to funding from Federations’ annual allocable pools, day schools may also receive funding from community foundations or endowment funds held at Federations.² In the survey, 59 Federations provided information about community foundation support for day schools. Among those respondent Federations, 29% (N=17) reported that all of the day schools in their communities receive additional funding from the Jewish community foundation, and another 36% (N=21) stated that some of the day schools receive additional funding. The balance of the 59 Federations, another 36% (N=21) reported that their day schools do not receive additional funding from the community foundation.

While 59 Federations responded to the question about whether their day schools received additional funding in 2015-2016 from the Jewish community foundation, only 18 provided information about the level and use of that funding. Community foundations in large-intermediate communities awarded the most funds to day schools, which received \$5,808,425 of the total reported \$8,062,041 that was awarded to day schools in 2015-2016. Federations reported that the funds were awarded for a variety of purposes, including:

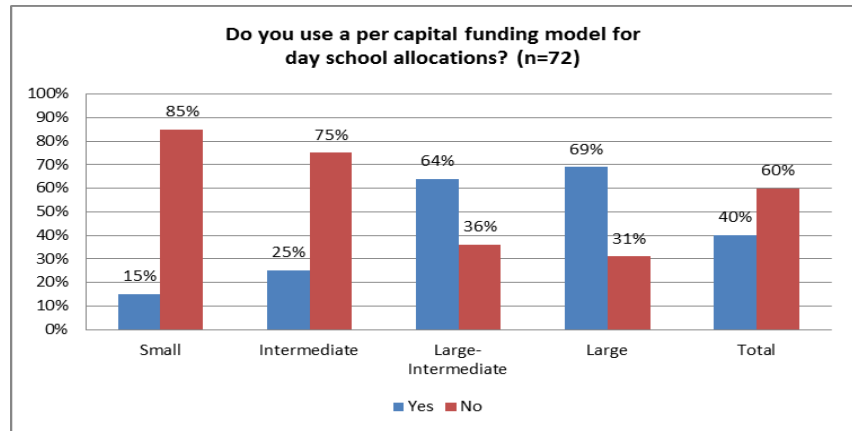
- Operations
- Capital Grants
- Purposes stipulated by endowment donors or donor-advised fund holders
- Teachers from Israel
- Projects
- Professional development
- Security
- Scholarships

² UJA-Federation’s Day School Challenge Fund incentivizes the development and growth of the endowments of NY-area day schools and yeshivot. Through this initiative, up to \$51 million in matching funds is available to schools that establish or expand their endowments. <https://www.ujafedny.org/get-info/for-day-schools/>

Day School Funding Models

Do You Use a Per Capita Funding Model? (N=72)

The data show that, in aggregate, 40% of respondent Federations use a per capita formula to fund the day schools in their communities. However, the use of per capita funding varies by the size of the community. Among the large and large-intermediate Federations, funding for day schools is most often done based on a per capita formula. Sixty-nine percent of the large Federations and 64% of the large-intermediates reported that they utilize a per capita approach. Conversely, most of the small and intermediate Federations reported that they do not use a per capita model (85% and 75% of respondents, respectively).



Among respondents who provided information on their process, most reported that the allocations committee, education task force and/or board determined the scope of the day school per capita pool. Often the pool is based on precedent and available resources. In some communities, there are methods for mitigating the effects of significant increases or decreases in enrollment, such as using average enrollment over a two- or three-year period. Some communities use a portion of the available funding for day schools to provide a per student allocation and the balance for infrastructure support or general operations. Other communities provide additional per capita incentive funding for new students in the school.

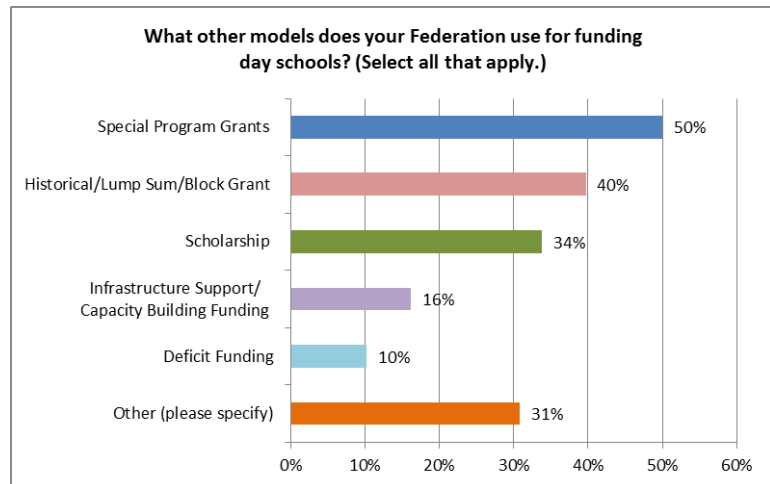
Some Federations that use a per capita methodology provide additional funding for higher grades. Appendix 2 provides examples of per capita applications to different grade levels

What other models does your Federation use for funding day schools? (N=68)

Following the question on whether Federations utilize a per capita funding model, respondents were asked what other models they use for funding day schools. This was intended to capture those Federations that utilize other models in addition to per capita funding, as well as those whose methodology for funding day schools does not fall in any of the provided categories. The following options and definitions were provided:

- Scholarship – Funds are allocated based on individual schools' scholarship needs.
- Historical/Lump Sum/Block Grant – A specific amount of money is allocated to each school, based on available dollars and/or the historical context of day school/Federation relations. Funding levels among schools in the same community may vary substantially.
- Deficit Funding – A specific amount of money is allocated to cover school deficits based on available dollars and/or the historical context of day school/Federation relations. The allocation may cover the entire deficit or a percentage of it.
- Special Program Grants – Funding is provided for specific programs such as educational innovations or staff development.
- Infrastructure Support / Capacity Building Funding – Grants are made to day schools to improve organizational effectiveness, financial stability, program quality, and growth.

Half of the respondents indicated they award special program grants to day schools, and 40% provide historical/lump sum/block grant funding. Others fund on the basis of scholarship (34%); infrastructure support/capacity building (16%); and/or deficit funding (10%). Many communities employ multiple strategies in determining annual support for day schools. For example, a Federation that uses a per capita model might also award grants for special programs or infrastructure. This is evident in that there are more selections (128 in total) than respondents (68).

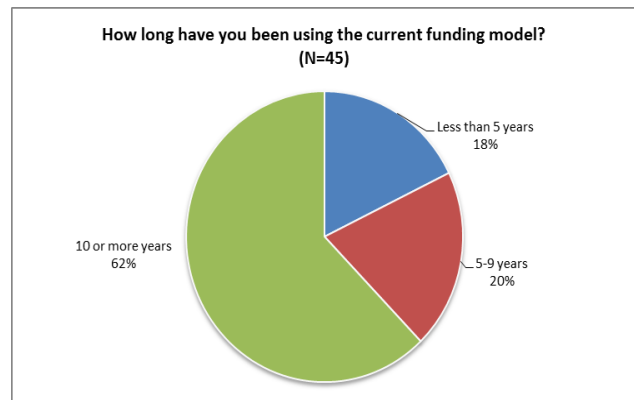


Respondents who provided detailed descriptions under “Other” noted that their Federations support day schools with the following strategies:

- Capital grants
- Day School Challenge Fund to help participating schools create and build endowment funds
- Additional grants through the educational arm of the Federation
- Subsidies and tuition freezes for middle-income families
- Loan guarantees
- Security grants
- Support of a central agency that builds capacity within day schools
- Limited support through Federation Supporting Foundations
- Funding of teacher fringe benefits
- Support of government funding (earned income tax credit); support of advocacy efforts for increased funding for private schools for textbooks, security, nursing and technology.
- Goal and outcome based funding.

Length of Time Federations Have Been Using Their Current Models (N=45)

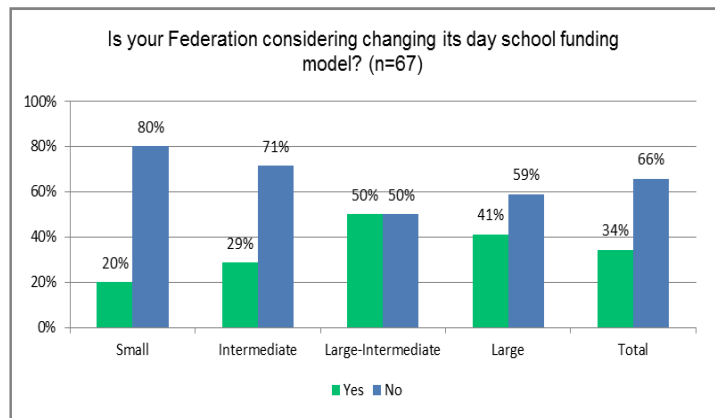
Most Federations have been using the same funding methodology for day schools for years. Sixty-two percent of the respondents reported that their day school funding process has been in place for a decade or more. Just 18% have a relatively new process, in place less than five years.



Satisfaction with Current Model

Is your Federation considering changing its day school funding model (or models)? (N=67)

Thirty-four percent of respondent Federations (N=23) reported that they are considering changing their day school funding models at this time. Just 20% of small Federations and 29% of intermediate Federations are seeking to change their day school funding model, while half of the large-intermediate and 41% of the large Federations are considering a change.



Of those interested in changing their day school funding paradigm, almost all report being in the early phases of evaluating options.

Analysis of Benefits of Various Models (N=64)

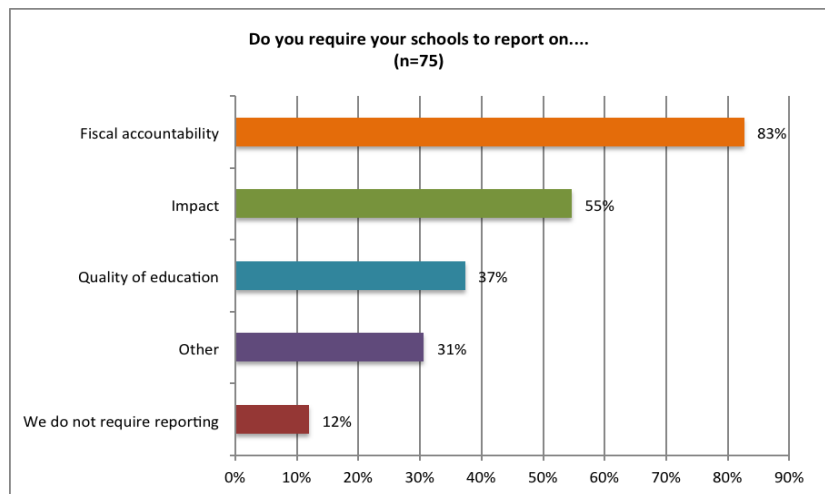
Federations seem to utilize methods for funding day schools that they perceive to be equitable or easy to administer. Of the 64 Federations that responded to this question, 83%, including all respondent large Federations, reported that their model was fully or somewhat equitable. Similarly, 88% of respondent communities felt that their model was somewhat or fully easy to administer. All of the large-intermediate and all but one of the large Federations reported ease of administration as a benefit of their system. Slightly less than half (46%) of respondent Federations reported that their model has the benefit of a linkage between program quality and funding, while 54% did not perceive such a linkage in their models.

When asked about other benefits their funding models provide, Federations reported the following:

- Assistance to day schools
- Support for Jewish families enrolling their children in day schools
- Funding Israel trips provides alignment with overseas mission
- Communicate clearly Federation’s support for Jewish education
- Day schools are able to predict their funding levels / stability for schools
- “*Shalom Bayit*” / communal harmony

Reporting Requirements (N=75)

Federations most often require the schools receiving funding to report on their financial condition and the impact of the education. Eight out of 10 Federations are focused on fiscal accountability and slightly more than half require reporting on the impact of Jewish day school education. Quality of education is often assessed in terms of accreditation and teacher certification. Federations also require reporting in the following areas:



- Enrollment
- Operating/leadership challenges;
- Strategic planning
- Community collaboration
- Successes and challenges
- Impact on Jewish identity
- Governance and administrative structures
- # of students on scholarship and other tuition assistance data

Day schools are often held to the same requirements as other constituent or partner agencies, such as financial data, client statistics, and proof of adherence to Federation branding requirements.

Eligibility Requirements for New Schools

Some Federations are open to funding new schools in their communities. Eligibility requirements for schools are often the same as for any new constituent or partner agency in the community and are defined by the Federation’s bylaws or allocations/grants committee. The waiting period for new schools to receive funding is generally three years, and the general guidelines are those

delineated on page 6. Several Federations shared their eligibility requirements for new schools in detail. These guidelines are found in Appendix 3.

Best Practices to Consider

While each community has its unique history, scope of resources and dynamics, an analysis of the survey responses suggests some principles that Federations should consider in adopting models of funding for day schools. The funding methodology should...

- Be easy for the Federation to administer, while allowing the Federation to obtain the data needed to help make the case for day school funding.
- Be perceived as somewhat equitable in order to promote communal harmony.
- Link funding to program quality in some way, for example, accreditation, teacher professional development, teacher certification.

In addition, reporting requirements should...

- Foster fiscal accountability by ensuring that the school has a sound financial plan, adheres to requirements regarding audits and other financial reporting, operates effectively and has diverse sources of revenue.
- Include impact and evaluation data that will strengthen the Federation's ability to make the case to individual and foundation donors.
- Not be overly burdensome to the funded entities, in particular when the scope of funding is relatively small.

Final Word

In most communities, day school funding is the Federation's largest single investment in local services. Day school allocations are technically complicated and sometimes politically thorny, and Federations are struggling to develop methodologies that address the needs of the schools, as well as their own needs to evaluate funded programs – including day schools – and report to their communities on the impact of their work and philanthropic investment.

Since 1949, with the first allocation to a Jewish day school, and since the 1990's, which saw a rapid expansion of day schools, Federations have been consistent and significant sources of funding to the schools. In 2006, ten years before the period studied in this report, the average amount of local annual allocable dollars given to day schools was 16%.³ Today day schools compete for funding with "other interventions - camping and Israel experiences most prominently - [that] have been reconceived as delivering experiential Jewish education and not only Jewish socialization."⁴ Despite the decrease in unrestricted annual funds in many communities and the increased competition for Federation dollars for Jewish education as well as other needs, Federations continue to invest, on average, 16% of their annual local funding in day schools.

³ Judelsohn, Robyn. Federation Allocation Report: Jewish Day School Education. United Jewish Communities, 2008.

⁴ Pomson, Alex, and Avigail Muller Waknine. [Challenges and Opportunities on the Jewish Day School Landscape](https://www.rosovconsulting.com/wp-content/uploads/2016/12/JFNA-Day-School-Landscape-Scan-Report-FINAL-20171108RC-WEB-VERSION.pdf). Jewish Federations of North America, 2017. <https://www.rosovconsulting.com/wp-content/uploads/2016/12/JFNA-Day-School-Landscape-Scan-Report-FINAL-20171108RC-WEB-VERSION.pdf>

Appendices

Appendix 1 – Respondent Federations

Eighty-nine percent of the 148 Jewish Federations in North America participated in the study, as shown in the following chart.

Size	# of Respondents	Total # of Federations in Category	Response Rate
Small	60	67	90%
Intermediate	38	46	83%
Large-Intermediate	16	17	94%
Large	18	18	100%
Total	132	148	89%

The following communities participated in the survey:

- | | | |
|-----------------------------|-------------------------|---------------------------------|
| 1. Akron | 45. Greensboro | 89. Pinellas County |
| 2. Ann Arbor | 46. Greenwich | 90. Pittsburgh |
| 3. Arkansas | 47. Harrisburg | 91. Portland |
| 4. Atlanta | 48. Hartford | 92. Princeton/Mercer/Bucks |
| 5. Atlantic/Cape May County | 49. Heart of New Jersey | 93. Quad Cities |
| 6. Augusta | 50. Houston | 94. Raleigh-Cary |
| 7. Austin | 51. Indianapolis | 95. Reading |
| 8. Baltimore | 52. Kansas City | 96. Rhode Island |
| 9. Baton Rouge | 53. Knoxville | 97. Richmond |
| 10. Berkshires | 54. Las Vegas | 98. Rochester |
| 11. Birmingham | 55. Lee County | 99. Rockford |
| 12. Bluegrass | 56. Lehigh Valley | 100. Rockland County |
| 13. Boston | 57. Los Angeles | 101. San Antonio |
| 14. Broward County | 58. Madison | 102. San Francisco |
| 15. Buffalo | 59. Memphis | 103. Santa Barbara |
| 16. Central Massachusetts | 60. Merrimack Valley | 104. Sarasota-Manatee |
| 17. Champaign-Urbana | 61. Miami | 105. Savannah |
| 18. Charleston | 62. Mid-Kansas | 106. Seattle |
| 19. Charlotte | 63. Milwaukee | 107. Sioux City |
| 20. Chattanooga | 64. Minneapolis | 108. Somerset County |
| 21. Chicago | 65. Mohawk Valley | 109. South Palm Beach |
| 22. Cincinnati | 66. Montreal | 110. Southern Arizona |
| 23. Cleveland | 67. Nashville | 111. Southern Illinois |
| 24. Collier County | 68. New Bedford | 112. Southern New Jersey |
| 25. Colorado | 69. New Hampshire | 113. Springfield, Illinois |
| 26. Columbia | 70. New Haven | 114. St. Louis |
| 27. Columbus | 71. New Mexico | 115. St. Paul |
| 28. Cumberland County | 72. New Orleans | 116. Stamford |
| 29. Dallas | 73. New York | 117. Syracuse |
| 30. Dayton | 74. North Louisiana | 118. Tampa |
| 31. Delaware | 75. Northeastern NY | 119. Tidewater |
| 32. Des Moines | 76. Northern NJ | 120. Toledo |
| 33. Detroit | 77. Northwest Indiana | 121. Toronto |
| 34. Durham-Chapel Hill | 78. Ocean County | 122. Utah |
| 35. Dutchess County | 79. Oklahoma City | 123. Vancouver |
| 36. East Bay | 80. Omaha | 124. Ventura County |
| 37. Eastern Connecticut | 81. Orange County, CA | 125. Virginia Peninsula |
| 38. Edmonton | 82. Orange County, NY | 126. Volusia & Flagler Counties |
| 39. El Paso | 83. Orlando | 127. Washington |
| 40. Flint | 84. Ottawa | 128. Western Connecticut |
| 41. Fort Wayne | 85. Palm Beach County | 129. Western Massachusetts |
| 42. Fort Worth | 86. Peoria | 130. Wilkes-Barre |
| 43. Grand Rapids | 87. Philadelphia | 131. Winnipeg |
| 44. Greater MetroWest | 88. Phoenix | 132. Youngstown |

Appendix 2 – Examples of Per Capita Applications to Different Grade Levels

Example Per Capita Applications to Different Grade Levels	
Large-Intermediate	High schools receive \$100 more per student.
Large	Funding level is weighted based on grade level, with higher grades receiving more per student.
Large	The annual Federation allocation for each school is based on actual student enrollment as of September 1st. The allocation formula is based on a weighted system that assigns: <ul style="list-style-type: none"> • A value of 1.00 for each student in kindergarten to grade five; • A value of 1.10 for each student in the 6th grade in a school having a stand-alone sixth grade; • A value of 1.25 for each student in grades 6 to 8 in those schools having all of these grades; • A value of 1.50 for each student in grades 9 to 12.
Large	Per capita funding is based on a formula that uses the average of the past three years of enrollment, the ratio of income to scholarship for the three most recent years of operation, a booster rate based on the income/scholarship ratio. That booster is applied to a base rate that increases from K-5 to 6-8 to 9-12 since tuition also is higher with increasing grade level. The base rate multiplied by the booster rate yields a new base rate that is multiplied by the enrollment number to generate the dollar amount.
Large	K-5 is assigned a factor of 1, middle school is assigned a factor of 1.3, and high school is assigned a factor of 1.5.
Large	A high school student is assigned a factor of 1.5 while non-high school students are factored at 1.
Large	\$9.85 million is distributed for tuition assistance using a robust algorithm to determine student (family) fees according to need. Each of the 14 schools applies that common algorithm to determine subsidy rates (helping to ensure that schools don't compete based on subsidy rates, that no child is turned away, and that families with children in multiple schools engage in one, synthesized process). After student need is determined, we then use a separate calculation to determine how our funds are distributed amongst the schools. Included in this is: <ul style="list-style-type: none"> • \$200K for students who have not been in day school before high school) • \$500K distributed on a per capita basis to schools that participated in a review of IEPs (Individual Education Profiles) to determine level of need for special education • \$250K designated for middle income funding.

Appendix 3 – Example Eligibility Requirements for New Day Schools

Example Eligibility Requirements for New Day Schools	
Large-Intermediate	<p>1. School must be located within the Federation’s current service area.</p> <ul style="list-style-type: none"> • Must derive 80% of its student population from within the current service area of the Federation. • Must have been in business at least 3 full consecutive years and have demonstrated ongoing financial viability. • Must offer 3 grades from Kindergarten and up. • Have a minimum of 75 students. • Supports goals and purposes of the Jewish Federation; demonstrated willingness to cooperate in the community as a whole with Federation and its agencies, including participation of the agency and its board members in the annual campaign. <p>2. Education Standards and Curriculum must include:</p> <ul style="list-style-type: none"> • Define its primary purpose as that of a Jewish day school that dedicates definable daily time to teaching meaningful Judaic curricula containing Jewish history, Hebrew language, prayer, Torah, and Jewish values. (25-50%). • Operating premise must include the State of Israel’s right to exist in security and safety. • Professional staff must be appropriately licensed, credentialed, or trained • Actively pursue standards of excellence in both is Judaic and secular studies programs as exemplified by accreditation by recognized national or regional bodies (such as OU, RAVSAK, OHC, AVI CHAI, PEJE, Middle States);and meet normally acceptable standards for faculty recruitment and placement and teacher training in both Judaic and secular fields. <p>3. Operations:</p> <ul style="list-style-type: none"> • Directed by an active, local board of directors or trustees whose sole function is the stewardship of the school and that establishes and monitors the implementation of appropriate financial standards. The board must serve without compensation, hold regular meetings to determine policy and exercise effective oversight of operations of the school. • Have and operate under a duly adopted constitution or articles of incorporation and a set of by-laws. • Qualified as a voluntary, not-for-profit organization under section 501(c)3 of the Internal Revenue Code. • Conduct its fiscal operations in accordance with a detailed annual budget approved by its Board of directors at or prior to the beginning of its fiscal year • Follow the Standards of Accounting and Financial Reporting for not-for-profit organization as promulgated by the American Institute of Certified Public Accountants and must maintain a financial system, including standard accounting procedures, acceptable to an independent certified accountant and all applicable government requirements. • Prepare an annual financial report in accordance with the Standards for not-for-profit organization as promulgated by the American Institute of Certified Public Accountants. • Have reasonable administrative and fundraising expenses.
Large-Intermediate	<p>Criteria (based on research from other Federations and consultations with JFNA and Prizmah):</p> <ul style="list-style-type: none"> • Accredited • Operating for at least 3 years • Minimum of 3 grades above Kindergarten • Demonstration of ongoing financial viability (able to self-generate sufficient financial support over and above tuition and any Federation support) • Directed by a board whose sole function is stewardship (e.g. not a 'parent council') • Adhere to Federation reporting requirements (990, financial statements, etc.) • Agreement with Federation annual campaign goal and their Board's meaningful participation in same (goal: 100% participation of all grantee board members at amount that is meaningful to each individual)
Large	<p>Once a school has operated for a full three years, we ask for audited financials, five year financial plan, scholarship information, enrollment, tax status, board membership, articles of incorporation, by-laws, information on senior professionals and insurance documentation. Currently, we do not ask about accreditation.</p>

Appendix 4 – Survey

1. Community name:

2. Community size:

3. Does your community have any Jewish day schools?

Yes

No

4. How many of the schools in your Federation region are Orthodox, Conservative, Reform, or Community Schools? For how many of each does the Federation provide funding?

	Total in your area	Funded by the Federation
Orthodox		
Conservative		
Reform		
Community		

5. What are the grade levels of the day schools in your community?

How many K-5?

How many 6-8?

How many 9-12?

How many K-12?

6. Are there any day schools in your community that the Federation does not provide funding support to?

Yes

No

If your Federation funds one or more day schools in your community, and does not fund others, please respond to these questions.

7. Please share why the Federation does not provide funding to this/these school(s).

8. Do you collect enrollment data from schools that are not funded by the Federation?

Yes

No

9. How many students are enrolled in schools that are not funded by the Federation?

In the following sections we are asking about the different ways in which schools can be funded.

10. What was the total amount of funding your community provided to day schools in fiscal year 2015- 2016? (Please include only the support from your allocable pool.)

11. What was the total amount of funding that your community provided to all local agencies and organizations (including day schools) in fiscal year 2015-2016? (Please include only the support from your allocable pool.)

Some Jewish community foundations provide support to local Jewish day schools.

12. Does your community have a Jewish community foundation?

- Yes
- No

13. Do your day schools receive additional funding from the Jewish community foundation?

- Yes, all of them
- Yes, some of them
- No, none of them

14. How much in additional funding did your day schools receive from the Jewish community foundation in 2015-2016?

15. How are these funds used?

Enrollment

16. What was the total number of students enrolled in Federation funded day schools in your community in academic year 2015-2016:

- Grades K to 5
- Grades 6 - 8
- Grades 9 - 12

In this section, we want to capture information on your funding model.

17. Do you use a per capita funding model for day school allocations?

- Yes
- No

18. Please explain how the Federation determines the total pool of allocable dollars that are available for per capita funding of day schools?

19. Do you have a different per capita funding level for different grade levels?

- Yes
- No

20. Please explain how the per capita funding level is applied to the different grade levels.

21. What other models does your Federation use for funding of day schools? (Select all that apply)

- Scholarship (Funds are allocated based on individual schools' scholarship needs.)
- Historical/Lump Sum/Block Grant (A specific amount of money is allocated to each school, based on available dollars and/or the historical context of day school/Federation relations. Differences among schools in the same community may vary substantially.)
- Deficit Funding (A specific amount of money is allocated to cover school deficits based on available dollars and/or the historical context of day school/federation relations. The allocation may cover the entire deficit or a percentage of it.)
- Special Program Grants (Funding is provided for specific programs such as educational innovations or staff development.)

- ___ Infrastructure Support / Capacity Building Funding (Grants are made to day schools to improve organizational effectiveness, financial stability, program quality, and growth.)
- ___ None
- Other (please specify)

22. If you have written documentation describing your day school allocations process, please email it to joy.goldstein@jewishfederations.org.

- Yes, I will email the documentation.
- No, we do not have written documentation.

23. When did you begin using this model (or models) of funding?

24. In your opinion, does your funding model(s) provide the following benefits...

	Yes, fully	Yes, somewhat	No
Equitable System			
Ease of Administration			
Linkage between quality and funding			
Other (please specify)			

What other benefits does your funding model(s) provide? (Please specify)

25. Do you require day schools that receive funding to report on: (Select all that apply)

Quality of education	
Fiscal accountability Impact	
Impact	
We do not require reporting	
Other (please specify)	

26. Is your Federation considering changing its day school funding model at this time?

- Yes
- No
- If yes, what are you considering?

Appendix 5 – UJA-Federation of New York Support of Jewish Day Schools

UJA-Federation of New York has approximately 350 Jewish day schools and yeshivot in its service area (New York City's five boroughs, Westchester, Nassau, and Suffolk counties), enrolling over 121,000 students. Due to the large number of schools in the UJA-Federation of New York service area and the Federation's unique approach to day school funding, the report does not include data on UJA-Federation of New York and the New York community Jewish day schools. This appendix is included to provide information on UJA-Federation's support of day schools.

Not all of New York's 350 Jewish day schools receive funding from UJA-Federation. Due to the number of schools and students, UJA-Federation of New York's funding model to day schools and yeshivot does not include a per capita allocation.

UJA-Federation's funding to day schools and yeshivot includes:

Scholarships and Teacher Benefits:

- Rose Biller Day School Scholarship Fund – awards \$1 million annually in needs-based scholarships to students enrolled in Jewish day schools and yeshivot in UJA's catchment area.
- Fund for Jewish Education – contributes over \$4.6 million annually to medical, pension, and life insurance benefits for 6,000 Jewish day school teachers in nearly 200 schools, in partnership with Gruss Life Monument Funds.
 - Almost 200 schools enrolling nearly 85,000 students received funding from the Rose Biller Scholarship Fund and/or the Fund for Jewish Education in 2015-16.

Endowment Building:

- Day School Challenge Fund – serves as a matching source for endowment dollars that are raised by 21 participating schools. Funds raised are deposited in an endowment fund at UJA for the direct benefit of a particular school, which will generate annual distributions payable to that school. Up to \$51 million is available for purposes of matching endowment dollars raised by participating schools. In fiscal year 2018, almost \$1 million in distributions is flowing back to Day School Challenge Fund participating schools.