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Leadership Perspectives on the Financial Sustainability of
Non-Orthodox Jewish Day Schools in Toronto

Dissertation Presented

By

Seth Goldsweig

Submitted to the Graduate School of Education

Lesley University

in partial fulfillment of the requirements

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Ph.D. Education Studies

Educational Leadership Specialization

Leadership Perspectives on the Financial Sustainability of
Non-Orthodox Jewish Day Schools in Toronto

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Ph.D. Educational Studies

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Dissertation Approval

In the judgment of the following signatures, this Dissertation meets the academic standards that have been established for the Doctor of Philosophy degree.

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Abstract

The purpose of this study was to better understand how Jewish school leaders in Toronto understand non-Orthodox Jewish day school financial sustainability. A review of literature included: (a) a multidisciplinary understanding of “sustainability”, (b) a history of Jewish education in North America, (c) challenges and potential solutions to financial sustainability of Jewish day schools in North America, and (d) the evolution of the school leader and its impact on financial sustainability. This multi-site case study used a questionnaire, completed by 23 school leaders, and one-on-one interviews with all eight heads of school of the non-Orthodox Jewish day schools in Toronto to collect data. Both data collection instruments addressed the guiding research questions: (a) To what degree do Jewish day school leaders believe addressing sustainability to be a leadership priority? (b) What are the various approaches to addressing sustainability reported by Jewish day school leaders? (c) What do leaders of Jewish day schools believe to be the factors and conditions that increase and inhibit their capacity to focus on school sustainability? The study included the following findings: (1) Financial stability is one of the most important issues for leaders in non-Orthodox Jewish day schools, but they are unable to focus on sustainability to the degree necessary due to their many other responsibilities; (2) The majority of non-Orthodox Jewish day school leaders do not believe they have achieved long-term financial sustainability, or will do so in the near future; (3) Known financial sustainability strategies were not being utilized to the degree desired by school leaders. The endowment strategy was identified as the most underutilized strategy; (4) A collaborative approach between schools to address the problem of financial sustainability is not currently being applied; (5) School leaders identified criteria to assess the impact of financial sustainability strategies; (6)

Lack of overall available time, most notably efforts on enrollment, prevent leaders from focusing more on financial sustainability; (7) The use of financial sustainability practices are contingent on the manner in which leaders choose to spend their time and other resources.

These findings led to eight recommendations for Jewish day school leaders to help support the financial sustainability of their institutions. Future research was also suggested.

Key words: Jewish day school, Jewish education, financial sustainability, school leaders, non-Orthodox, Toronto

DEDICATION

This dissertation is dedicated to my wife, Amy. I never would have started, let alone finished, this long journey without your encouragement and support. My cheerleader, editor, motivational coach, partner and more. Thank you!

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CHAPTER ONE: INTRODUCTION

When asked what my profession is, I proudly state that I am a Jewish educator. Not an educator who is Jewish, rather, an educator who believes in the power and importance of providing students an opportunity to wrestle with, and formulate, their own personal Jewish identities in the modern world.

At times, this form of education is easier said than done. Providing a meaningful and relevant Jewish education has become that much harder in today's world. Modern Jews live in a world of choice. The impact of modernity, freedom, and choice on identity formation is not a new idea. For centuries, Jewish thinkers have weighed the challenges of modernity towards Jewish identity. A study in 1990 related quite clearly to this challenge.

The Jews of North America live in an open society that presents an unprecedented range of opportunities and choices. This extraordinary environment confronts us with what is proving to be an historic dilemma: while we cherish our freedom as individuals to explore new horizons, we recognize that this very freedom poses a dramatic challenge to the future of the Jewish way of life (Commission on Jewish Education in North America, 1990, p. 25).

North American Jewish youth have more choices today than any generation previously. While freedom is an incredible and necessary value, the freedom to choose means that not all Jews will opt to create and maintain a Jewish identity, regardless of their level of Jewish education. This will have an impact on the future continuity of the Jewish community.

Jewish educators today have a unique opportunity, and challenge, to present a Judaism that speaks to today's generation of students. While there are many ways to accomplish this,

numerous studies agree that the best method for helping students build a relevant and meaningful Jewish identity is through an education in the Jewish day school system (Held, 2014; Task Force on Jewish Schools, 1999; Cohen and Kotler-Berkowitz, 2004). And yet, especially in the non-Orthodox Jewish community, fewer and fewer families are choosing to enroll their children in Jewish day schools (Rosov, 2017). Before continuing to discuss the challenges to the non-Orthodox Jewish day school system, I will share a few of the formative experiences in my own life that led to my passion for Jewish day school education.

My role today as a Jewish day school educator was a surprise for many, myself included. I am not a product of Jewish day school education. Like many other Jewish children in North America, I went to a congregational school one day a week for a few hours after school. It was not something I looked forward to and not something that I remember fondly. Based on my experience, if someone had told me then that I would have a future career in Jewish education, I would have been shocked. However, my educational experience in congregational school gave me a starting point on the formation of my Jewish identity. Along with attendance at synagogue and Jewish experiences with my family, congregational school provided me with some of the necessary vocabulary and ideas that would be prevalent in my Jewish identity. Later on there would be other experiences that led me to a career in Jewish day school education, but first I had to go to university.

At Binghamton University, in Upstate New York, I met other students from diverse backgrounds, culturally and religiously. In many cases, I was one of the few Jewish people they had ever met. I felt a certain obligation to present an open and honest perspective on my religion. However, I was lacking much of the basic knowledge that I felt necessary to adequately explain

the religion, culture, and history to my peers. I realized something quite important: learning more about my Jewish identity would not isolate me from the world. Rather, it would allow me to be a more effective contributor to the multicultural society that I lived in. Having a strong sense of my own Jewish identity would better equip me to engage in conversations with others as to what makes us different and what makes us similar. I decided to enroll in a Hebrew language class, and I began to study Jewish texts at a local Jewish institute. At this same time, I began to consider a profession of teaching. While I began to envision myself as a future educator, the idea of Jewish education was still not a consideration for me. It would take a substantial amount of time in Israel to lead me to the career of Jewish education.

My first trip to Israel took place during the summer between my junior and senior years in high school. It was a trip filled with fun and learning, but also left me with a desire to return to Israel one day soon. While in university I elected to study abroad in Israel for a year. That experience also left me wanting to spend more time in Israel and, following graduation from university, I moved to Israel for four years. My total of five years in Israel were filled with many experiences and learning opportunities, and there was a common thread to the experience that were prevalent throughout my time there. I was constantly meeting people who were interested in forging their Jewish identities and learning about Judaism. Some of these people were religious, and some were not. Some had a strong belief in God, and others were devout atheists. Some were adults and some were teenagers. For the first time my Judaism didn't put me in the minority: I was in the majority. The more I learned, the more I wanted to meet others from different backgrounds, both Jewish and non-Jewish, to see what made us similar and what made us different. I began to see Jewish education as a tool for Jews to learn about themselves and

then to contribute to the multicultural world in which we lived. The rest, as they say, is history. I enrolled in a Jewish education program and became a teacher in the Jewish day school system.

As an educator today, it is important for me to give students the tools to be able to explore on their own. I don't have the answers for them, but I have many questions that I encourage asking. I believe in comfort and discomfort. I share ideas within Judaism that they may love and others that they may seriously object to, all in the interest of helping them to understand, in their own language, what it means to be Jewish in the modern world. However, it doesn't stop there. My students are very involved in interfaith and intergenerational activities, as well as programs with students that have severe developmental challenges and other special needs. These encounters offer my students an opportunity to present their own understandings of Judaism, and to learn from others whom they would not regularly come into contact with, about core beliefs. These experiences enable my students to contribute more positively to the world in which they inhabit.

The experience for my students described above would not be able to occur without a Jewish day school to attend. Unfortunately, the future of non-Orthodox Jewish day schools remains unknown. Many schools are closing due to fewer students and limited funds. While several family foundations have been set up to support Jewish education, and Jewish day school education in particular, (e.g. Avi Chai Foundation, Jim Joseph Foundation) non-Orthodox Jewish day schools are still failing to be the choice for the majority of potential constituents. I am concerned that if we do not solve the current sustainability challenges, more schools will close. Fewer students will take part in an educational opportunity that, research shows, does the best job of helping students build their Jewish identities (Held, 2014; Cohen and Kotler-Berkowitz,

2004). This research contributes to understanding non-Orthodox Jewish day school sustainability.

This chapter is broken up into several sections. Following this introduction, I present the Statement of the Problem which discusses a summary of the factors that are negatively contributing to the issue of sustainability in the non-Orthodox Jewish day school system. Then, in the Purpose of the Study, I lay out what I hoped to accomplish with this study, and share the guiding questions for the research that framed the structure of the study and what I aimed to achieve. The next section, Definition of Terms, defines major concepts and potentially new terms to facilitate understanding within the context of this dissertation and to avoid the possibility of misinterpretation. In the Significance of the Study, I explain how the research can be used and the main parties that could benefit from the results of the research. In the Delimitations of the Study, I describe the delimitations that were consciously selected to frame the focus of my study and the results. Next, I discuss the bodies of literature that were necessary to research for chapter 2 of the dissertation. Then I present a rationale for the type of method selected, describe the participants who were interviewed in the research, and explain the procedures used to collect and analyze the data. The chapter concludes with a Chapter Outline of each of the five chapters in the dissertation. Now I turn to the nature of the problem of sustainability in non-Orthodox Jewish day school education.

Statement of the Problem

The future sustainability of non-Orthodox (or liberal) Jewish education in North America is of grave concern. “The number of liberal day schools and the number of children attending those schools has been in decline since 2003-04” (Rosov, 2017, p. 4). “These schools (i.e.

liberal/ non-Orthodox day schools) now constitute but 13% of all day school enrollment, down from 20% in 1998” (Schick, 2014, p. 2). While the issue has received significant attention in recent years, it is not a new concern. In a report on the status of Jewish education in 1990 it was written, “Moreover, policy makers question the prospects of continued growth in light of the high cost of tuition, which is prohibitive even for many middle class families (Commission on Jewish Education in North America, p. 34). Then, in the late 1990s, a task force was set up to study the future “Viability and Vitality” of the Jewish day school system in North America. They discovered that the increasingly high cost of day school was not the only issue. Perceived value was also a factor. “A major finding of our process was that while tuition can be a factor in whether families choose day school, the image and quality of the school play a significant role in parent decision making. It is clear that quality and funding are linked” (Task Force on Jewish Day School, 1999, p. 4). While advocates of Jewish day school education have been concerned about its sustainability for many years, the solution to the problem has yet to be found.

Jewish day schools came to the forefront as a viable model of Jewish education in the late 1940s. “By the late 1940s day schools were receiving a disproportional percentage of grant monies, and by 1955 they were being awarded more grant money per year than the weekday supplementary schools” (Krasner, 2011, p. 396). They achieved their heyday at the turn of the 20th century and, since then, have begun a decline (Rosov, 2017). Today, if anyone was to open the pages of any Jewish newspaper in North America, he or she would see numerous articles and editorials focused on the topic of Jewish day school sustainability. It has become a major concern for the Jewish community, and many people are working hard to find a solution.

There are several possible reasons for this decline, including, but not limited to the increasing cost of Jewish day schools, cost of living increases, a decrease in perceived value of Jewish education, a decrease in the importance of living Jewishly in non-Orthodox Jewish households, and an increase in the number of schooling options that are available to Jewish families. If the decline continues it is possible that schools will close, staff will lose their jobs, and fewer kids will take part in the Jewish day school experience, limiting the range and diversity of connections they'll make to their cultural history and heritage. This is a big issue because numerous studies highlight that Jewish day school is the best-known model to enable students to develop a strong sense of Jewish identity (Held, 2014, pg. 1). Furthermore, “we have research from Brandeis University’s Cohen Center that day school graduates achieve among the highest levels of academic success” (Chertok, 2007, as cited in Brown, 2018). It would be a tremendous loss to the future of Jewish identity, community, and culture in North America if the non-Orthodox Jewish day school system collapses.

Below is a list of some of the approaches that have been taken thus far to mitigate the crisis: increase school enrollment (Aronson, 2017, August 4); lower tuition (Aronson, 2017, August 24); increase reliance on charitable donations (Kelman, 2017); focus on education excellence (Malkus, 2016); control costs, determine and reach school capacity, communal collaboration, mobilize external support, focus on middle income families, and build endowments (Held, 2014). None of these approaches have worked on a scale large enough to stem the tide of non-Orthodox Jewish day school enrollment attrition because, as the Rosov report of 2017 shows, day school enrollment continues to decline. Each community has different needs and challenges. Thus, to complicate the matter even further, it is possible that the solution

is based on the context of each community, and what works in one city may not work the same somewhere else.

The Jewish day school system is not the only school system to extensively research the issue of school sustainability. As the cost of education rises, the non-parochial day school system has also been faced with the challenge of future long-term health and sustainability of their schools. There is extensive research on the topic (National Business Officers Association, 2010; Lourie, 2016). Some of the key strategies they have focused on include cost cutting, alternative revenues, enrollment management, financial aid, and value proposition (EAB, 2017). Given what has been established, school sustainability is an ongoing challenge for all private schools, regardless of affiliation.

Non-parochial private schools are greater in number, have been around for many more years, and have a much higher number of resources at their disposal. There is substantial research that can be mined to inform the Jewish day school sustainability challenge. There is limited understanding and insufficient research on what Jewish day schools can learn from non-parochial private school sustainability models. Learning more from this school system and applying this knowledge to the Jewish day school system is one of the goals of this research project.

Purpose of the Study

The purpose of this study was to determine the degree to which Jewish day school leaders have an impact on the sustainability of Jewish day schools, and if their sustainability efforts are a leadership priority. The study illuminated the degree to which Jewish day school leaders are aware of the many sustainability strategies available to them (strategies identified through this

research), as well as the degree to which they are focused on implementing them in their own schools. In addition, this study uncovered key approaches to sustainability that are implemented by the private non-parochial school as well as other organizations concerned with their sustainability that could positively impact the Jewish day school system. The study also examined the level at which Jewish school leaders feel they have been effective in their sustainability efforts. The criteria they use to measure their efficacy was also explored. Finally, the research helped to identify the key factors and conditions that inhibit and promote the capacity of Jewish school leaders to focus on the sustainability of their schools.

The following research questions guided the study:

- To what degree do Jewish Day school leaders believe addressing sustainability to be a leadership priority?
- What are the various approaches to addressing sustainability reported by Jewish Day School leaders?
- What do leaders of Jewish day schools believe to be the factors and conditions that increase and inhibit their capacity to focus on school sustainability?

Definition of Terms

This section clarifies necessary terms for the comprehension of this study.

Sustainability - “the long-term financial **and enrollment** viability of the school—balancing its budget year after year and being able to withstand short and long term financial challenges including **an affordable tuition rate**, the steady demand for increased financial assistance and need to invest in a quality educational program” (Held, 2014,with my additions in bold).

Sustainability strategy - a plan of action designed to contribute positively to the goal of sustainability at a school

Jewish day school - a Jewish educational institution that delivers both a Jewish and secular curriculum in one school on a full-time basis.

Non-Orthodox Jewish day school - “There are three categories of non-Orthodox schools: Reform, Conservative, and Community” (Schick, 2014, p. 2). Also known as a liberal Jewish day school.

Supplementary school - also known as congregational school, Hebrew school, Sunday school. A Jewish educational institution that delivers a Jewish curriculum outside the time that a student receives a secular education during the day at a public or private school.

Non-parochial private day school - a full-time school that does not receive funding from the government, and has no affiliation with a religious organization. Other names: independent school, private school, private day school

Jewish day school leaders - Some define the leaders as heads of Jewish day schools. Others define the leaders as the principals. Others define the leaders as the members of the Board. Others define the leaders as the leaders of communal organizations that oversee Jewish education. For the purpose of the study, this term was defined as anyone that plays a role in the decision making of the implementation of sustainability strategies at non-Orthodox Jewish day schools in Toronto, and is most likely to include heads of school, administrators, and board members.

Significance of the Study

This section will focus on why the study was significant, to whom the study was significant, and how the study was significant. As discussed above, the literature clearly states that the Jewish day school is the best known model for the formation of Jewish identity. However, particularly in the non-Orthodox Jewish day school system, the current model is not sustainable and more research needs to be done to propose new strategies for sustainability in order to keep the Jewish day school as a viable option for families. This section will now highlight why the study was significant to the field of Jewish education.

There is limited research on this topic as there are no known studies on the application of non-parochial private school sustainability strategies to Jewish day schools. Additionally, there are only limited references to non-parochial private school sustainability best practices when the literature discusses Jewish day school sustainability. It should be noted that there is an abundance of literature on both non-parochial private school and Jewish day school sustainability, but no overlap between the two. This research intended to bridge these two worlds and to understand areas of overlap and influence. Geographically speaking, there is also no known research on the role of Jewish day school leaders in Toronto in the sustainability of their schools. Because each Jewish educational community is unique, a close look at the factors and conditions that promote and inhibit sustainability thinking in Toronto could be very significant for the successful continuation of Toronto's Jewish day school community.

There are a number of groups of people who can benefit from this research. The first group is the leaders of Jewish day schools. Many Jewish day school leaders are engaged in sustainability thinking on a regular basis. Knowing what other school leaders do and don't do

and why, as well as possessing a greater understanding of the factors and conditions that contribute to and inhibit sustainability thinking at schools, will enable them to be more effective practitioners of sustainability strategies. This has the potential to positively impact their schools and the greater Jewish day school system. Another group that can benefit from this research are philanthropists that donate money to Jewish education. This study identified many sustainability practices at non-Orthodox Jewish day schools and non-parochial private day schools. With this list, philanthropists can have more information available to them when deciding on how their money is to be used, especially if sustainability is an important issue for them. This study can also have an impact on the consumers of Jewish day school education: families. Many of the school sustainability strategies target potential families. Anyone who is paying the increasingly expensive bill for Jewish education can benefit from this study, especially if these sustainability strategies have the potential to save them money. Another group that could be interested in the results of this study are the employees of Jewish day schools. Their livelihood is dependent upon the continuing sustainability of the Jewish day school system. Without it, they face the prospect of losing their jobs. The final group that can benefit from this study are community federations or boards that oversee Jewish education. Across the continent these organizations provide funding for Jewish day schools. Sustainability is a central issue for all of them and reading this study could impact how they allocate funds for the Jewish day school system.

This section has looked at why the study was significant and to whom the study was significant. Now it will discuss how it was significant. First, it provided data to Jewish day school leaders that can inform school sustainability. Second, it highlighted the degree to which Toronto Jewish day school leaders are currently engaging in sustainability thinking and acting.

Third, it informed community philanthropists of Jewish sustainability practices. Fourth, it synthesized research to understand what sustainability practices look like at a non-Orthodox Jewish day school. Finally, it brought a new voice (the non-parochial private day school system) into the conversation about Jewish day school sustainability. All of these were compelling reasons for this study to take place.

Delimitations of the Study

Delimitations are boundaries that have been consciously set for a study. They are specific choices that will impact the study and should be mentioned by the researcher.

The first delimitation of this study was the choice to focus solely on non-Orthodox Jewish day schools rather than all Jewish day schools. Non-Orthodox Jewish day schools have different challenges to sustainability than do the Orthodox Jewish day schools. Thus, it was important to separate the two as the potential solutions could be quite different. Delimiting the study allowed for more specific feedback to the non-Orthodox schools.

Geographically, the data collection only came from schools in the Greater Toronto Area. It was helpful to survey Jewish educational leaders in one geographic region as they are impacted by more similar cultural, sociological, and economic factors than schools in another city. Additionally, it made the research gathering phase much more feasible.

The final delimitation was to focus on collecting data from leaders of Jewish day schools that engage in thinking about school sustainability, not all of the constituents of a Jewish day school. There are many different groups and individuals that have an impact on Jewish day school sustainability. However, not all of them have a direct say in the sustainability strategies a school chooses to implement. While all constituents are affected in some way, this study focused

on those who are most likely to be part of the decisions a school makes about sustainability, specifically heads of school, board members and administrators.

Review of the Literature

Several bodies of literature were examined in the dissertation. First, I explored the concept of sustainability from a multidisciplinary perspective. It is a concept found in environmental science (Mirna, Wahyono, & Ali, 2018), economics (Tsuchiya, 2016), schools (Bassett, 2010), work (Schaltegger, 2015), and leadership (Fullan, 2003). Through this research I formulated a definition of sustainability that was used for the remainder of the paper. In addition, I looked at how one goes about promoting sustainability (as an individual or an organization) in different fields. A multidisciplinary perspective provided additional ideas for the application of sustainability models in the non-Orthodox Jewish day school system.

Second, I researched what the literature says about the history of Jewish education in North America and the comparatively recent history of the Jewish day school movement in North America. By understanding what led to its growth and success, I was able to come to a better understanding of the recent struggles and sustainability challenges.

Third, I examined the current challenges and potential solutions to the financial sustainability of Jewish day schools in North America. Understanding the challenges allowed me to better understand the challenges and perspectives of the Jewish day school leaders. Reading about the potential solutions allowed me to see what has already been tried to help mitigate the issue.

Fourth, the school leader plays an important role in the decisions and strategies used by a school to positively impact sustainability. However, the job of the 21st century school leader has

undergone a number of changes that have made the job more complex and stressful (Raj, 2017). There are many more factors that compete for the time of the school leader. In order to better understand the important and challenging role of the head of school in non-Orthodox Jewish day school sustainability, it was important to have a clear understanding of the challenges of being a leader in the 21st century. This included schools, and non profit or philanthropic organizations. An increase in responsibilities and challenges has led to new behaviours and strategies by leaders in these institutions. It was important to have a solid understanding of changes that have come with being a leader in the 21st century as this allowed the study to make suggestions with a greater understanding of what the school leader can and cannot do.

The literature review concluded with a summary of what had been discussed and a section on further ideas to consider and future research.

Method

This section explains the type of study and why it was selected, describes the participants and setting, the types of instrumentation used or developed and explains the procedures and electronic tools used to collect and analyze the data. It will conclude with a discussion of potential bias and steps that were taken to mitigate the bias.

Case Study Research

In this section I will briefly describe several different types of qualitative research and then explain why case study research was the best choice for this study. Within qualitative research, there are many different types of studies that the researcher could conduct. One type is called narrative research. In narrative research the researcher “explores the life of an individual” (Creswell and Poth, pg. 67) or individuals, and “gathers the data through the collection of their

sporties, reporting individual experiences and chronologically ordering the meaning of those experiences” (pg. 68). This research looked to understand the Jewish day school leadership in Toronto and their interest in the sustainability of the school system. It was not as interested in their individual stories, but rather the collective story. Thus, narrative research was not the best choice for this study. Another type of qualitative research is a phenomenological study which “describes the common meaning for several individuals of their lived experiences of a concept or a phenomenon” (pg. 75). This research was not trying to better understand the essence of a lived phenomenon. It sought to better understand the group of Jewish day school leaders in Toronto as they grapple with the issue of sustainability. A third type of qualitative research method is called grounded theory research. “The intent of a grounded theory study is to move beyond description and to generate or discover a theory” (Cobrin and Strauss, 2007 as cited in Creswell and Poth, pg. 82). However, the goal of this research was not to formulate a theory. Rather, the goal was to better understand the group of Toronto Jewish day schools leaders and their experience in thinking about, and acting upon, sustainability. The fourth type of qualitative research to be discussed in this section is ethnographic research. “Ethnography is a qualitative design in which the researcher describes and interprets the shared and learned patterns of values, behaviours, beliefs and language of a culture-sharing group” (Harris, 1968 as cited in Creswell and Poth, pg. 90). This research was not seeking to describe a cultural group. While the majority of the interviewees and survey takers were Jewish, the study was not trying to make conclusions about the Jewish people. Instead it was trying to understand the importance that school leaders of Jewish day schools place on sustainability and the strategies they use to improve sustainability.

This study was a case study using qualitative research methods. “Case study research involves the study of a case (or cases) within a real-life contemporary context or setting (Yin, 2014 as cited in Creswell and Poth, 2018, pg. 96). The cases in this study were eight non-Orthodox Jewish day schools in Toronto. Yin (2017) suggests choosing to do a case study under the following conditions:

- 1) Your main research questions are “how” or “why” questions,
- 2) You have little or no control over behavioural events, and
- 3) Your focus of study is a contemporary phenomenon

First, while the research questions of the study did not have the words “how” and “why” in them, they are essentially how and why questions. How are the leaders of Jewish day schools implementing sustainability strategies? Why are the leaders of non-Orthodox Jewish day schools concerned about the future sustainability of their schools? Second, in doing a case study on the leaders of these Jewish day schools, the researcher had little to no control over the behaviours of the leaders or any other actions that took place at the sites being studied. The study was only able to collect and analyze data. Finally, the research looked at non-Orthodox Jewish days schools of Toronto in today’s world. Within the dissertation there is some description of the past to set up the context of the study. However, the data collection and analysis took place using contemporary information and interviewees. Thus, all of Yin’s conditions for a case study were met and it made the most sense as the type of qualitative research to conduct for this study.

There are many different types of case study designs. This research was a multiple-case holistic design. That means that multiple sites were studied (i.e. multiple schools), but analysis only took place at one level - school leaders - which is considered holistic. Multiple sites were

chosen because “the evidence from multiple cases is often considered more compelling, and the overall multiple-case study is therefore regarded as being more robust (Harriott and Firestone, 1983, as cited in Creswell and Poth, 2018, pg. 54).

Data Collection

There were two main phases of data collection: a survey of non-Orthodox Jewish day school leaders in Toronto and then one-on-one interviews with eight heads of non-Orthodox Jewish day schools in Toronto. When collecting data, I used the four principles of data collection as described by Yin (2017).

- 1) Use multiple sources of evidence
- 2) Create a case study database
- 3) Maintain a chain of evidence, and
- 4) Exercise care with using data from social media sources.

The anonymous survey (see Appendix 3) began with a small pilot group. This group was used to test the online survey instrument, make sure the results come back anonymously, and to provide feedback on the clarity of the questions asked. Once fully satisfied with the content of the survey, it was sent out to leaders (heads of school, board members, and administrators) of eight non-Orthodox Jewish day school institutions in Toronto: Paul Penna Downtown Jewish Day School, The Leo Baeck Day School, The Heschel School, Bialik Hebrew Day School, Associated Hebrew School, Montessorri Jewish Day School, Robbins Hebrew Academy, and The Anne & Max Tanenbaum Community Hebrew Academy of Toronto. Through a website search, personal connections, and referrals, I sent the survey to all of the heads of school, administrators and board members of these schools. I also asked these individuals to pass on the survey to other

school leaders (i.e. heads of school, board members, and administrators) at their respective institutions. The survey took 10-20 minutes to complete. I opened the survey for six weeks and reminder emails were sent every two weeks to those who had not completed the survey. The questions in the survey were constructed to provide data to help answer the guiding research questions of this study. In particular, they captured the sustainability practices and beliefs of the many different leaders of non-Orthodox Jewish schools in Toronto. They asked leaders to indicate the level of importance leaders placed on sustainability and highlight the most common sustainability strategies used. Finally, the survey identified gaps in the conversation about sustainability in the Jewish day school world of Toronto which informed the types of questions that were asked in one-on-one follow-up interviews with heads of non-Orthodox Jewish days schools.

To mitigate concerns by the survey takers related to school competition and the sharing of private information, I did not include any demographic data collecting questions in the survey. I did not know which specific school or person the survey was coming from. This was explained in the cover letter, and allowed each survey to remain anonymous. My goal was to have 20-30 surveys that would help provide insight into the sustainability practices of the leaders of the non-Orthodox Jewish day school community. The final number was 23 so the goal was reached.

As mentioned above, following the survey, I then interviewed eight non-Orthodox Jewish day school heads of school using a set of questions that were influenced by the conclusions made from a quantitative analysis of the survey data. An interview protocol was established and provided consistency across all interviews (see Appendix 4). All heads answered the same questions to allow for clear comparisons between their answers. Additionally, there was also an

open question that allowed them to share anything else about sustainability that they wished to share with me. As the researcher I also had several follow-up questions based on the answers given by the interviewees. As the data were collected, it was important to organize them in a way that allowed for easier analysis. I created a case study database to help in the future data analysis stage. “The needed case study database will be a separate and orderly compilation of all the data from a case study . . . The database’s main function is to preserve your collected data in a retrievable form” (Yin, 2017, pg. 131). The database was organized by groups of answers to each individual question. This allowed for a clear presentation of the data based on the varied answers to each separate question.

When doing research, it is also very important for the reader of the research to be able to see a clear link between each level of evidence. This is called maintaining a chain of evidence, “The principle is to allow the reader of a case study to follow the derivation of any evidence from initial research questions to ultimate case study findings” (Yin, pg. 134). Each stage of the research was based on the initial guiding research questions described earlier. These questions provided the common themes and language that will allow the reader to see the connections between the data collection, data analysis and the ultimate findings of the project.

Data Analysis

There were two stages of analysis. First, once the survey had been closed, the survey data was analyzed. Data analysis “involves organizing the data, conducting a preliminary read-through of the database, coding and organizing themes, representing the data, and forming an interpretation of them” (Creswell and Poth, 2018, pg. 181). The analysis of the survey data was primarily a quantitative data analysis, highlighting trends and the most common answers. There

was some qualitative data analysis as some of the questions relied upon written responses. From the survey data, I was able to identify sustainability practices and beliefs based on the Toronto non-Orthodox Jewish day school community as a whole. Rather than beginning from a theoretical proposition, I worked with the data from the “ground up” (Yin, 169). This means that I used the data and developed my conclusions based on examining the data. The conclusions came after the data analysis stage, not at the beginning.

The next round of questions was answered in the one-on-one interview stage with the heads of school. The analysis from the survey data was used to modify the one-on-one interviews. Based on trends, irregularities, and most common answers of the survey data, I asked further clarifying questions. All of the interviews were transcribed. Using the coding method, key themes and ideas were gathered from the interview data. The final stage of analysis took place after the one-on-one interviews were completed. Because I knew the school affiliations of each interviewee, I was able to make conclusions about sustainability practices of individual schools.

Potential bias

I am employed at one of the non-Orthodox Jewish day schools in Toronto, and I needed to take extra precautions to limit any bias. Through each stage of the process, my doctoral committee provided insight and guidance and served as a non-partial party as I collected and analyzed the data. The survey was piloted ahead of time with leaders from my own school in order to test any potential hiccups or wording challenges. I have a direct relationship with them and was able to more easily receive feedback in a timely manner. This also gave me a chance to ask those in the pilot round to give feedback on any questions that appeared to have bias. For the

one-on-one interviews, I asked the same questions to each interviewee. I also recorded and transcribed each of the interviews. The printed transcription allowed me to preserve everything the interviewee said.

Chapter Outline

This section of the chapter will summarize what will be found in each chapter of the dissertation.

Chapter 1 began with relevant biographical information of the researcher to demonstrate a personal interest in the topic. It then included an introduction to the topic, statement of the problem, purpose of the study, guiding questions, definition of terms, significance of the study and delimitations of the study.

In chapter 2, I presented the literature related to the study. I analyzed the following bodies of literature: a multi-disciplinary look at the concept of sustainability, the history of Jewish education in North America, challenges to non-Orthodox Jewish day school sustainability, potential solutions, and leadership and Jewish education in the 21st century.

In chapter 3, I described the methods for research. I explained the case study method and how it was used in the study. I gave a description of the participants in the study. In this chapter I also explained how the data was collected and analyzed.

Chapter 4 of the dissertation was a presentation and discussion of the data and findings of the study. Data and findings were explained through the process of coding, charts, tables and written explanations. It was organized by the research questions that guide the study.

Chapter 5 of the dissertation included a discussion of the findings and implications for future research in the field of non-Orthodox Jewish day school sustainability. I then shared a list

of recommendations for school leaders. I also outlined possibilities for other research that could add to the studied topic of school sustainability. The chapter ended with a final reflection on the impact of the work towards my own thinking and understanding of the subject.

CHAPTER TWO: LITERATURE REVIEW

Introduction

The sustainability of non-Orthodox (or liberal) Jewish education in North America is in a crisis. “The number of liberal day schools and the number of children attending those schools has been in decline since 2003-04” (Rosov, 2017, p. 4). As an example, examine the demographics in Toronto, one of the larger Jewish day school communities in North America. Since 2008, enrollment at Toronto Jewish day schools has declined 19% (Grassroots for Affordable Jewish Education, 2018). It hasn’t always been this way.

Jewish day schools came to the forefront as a viable model of Jewish education in the late 1940s. “By the late 1940s day schools were receiving a disproportional percentage of grant monies, and by 1955 they were being awarded more grant money per year than the weekday supplementary schools” (Krasner, 2011, p. 396). They achieved their heyday at the turn of the 20th century and, since then, have begun a decline (Rosov). One need simply to open the pages of any Jewish newspaper in North America to see numerous articles and editorials focused on the topic of Jewish day school sustainability. It has become a major concern for the Jewish community and many people are working hard to find a solution.

There are several possible reasons for this decline, including, but not limited to, the increasing tuition cost of Jewish day schools, cost of living increases, a decrease in perceived value of Jewish education, and a decrease in the importance of living Jewishly in non-Orthodox Jewish households. If the decline continues, schools may close, staff may lose their jobs, and fewer kids will take part in the Jewish day school experience, limiting the range and diversity of connections they’ll make to their cultural history and heritage. This is a big issue

because numerous studies highlight that Jewish day school is the best-known model to enable students to develop a strong sense of Jewish identity (Held, 2014; Task Force on Jewish Schools, 1999; Cohen and Kotler-Berkowitz, 2004). Additionally, “The Jewish day school has demonstrated convincingly that it is one of the best ways of combating the corrosive effects of assimilation” (Schiff, 1967, pg. 82). Furthermore, “we have research from Brandeis University’s Cohen Center that day school graduates achieve among the highest levels of academic success” (Chertok, 2007, as cited in Brown, 2018). It would be a tremendous loss to the future of Jewish identity, community, and culture in North America if the non-Orthodox Jewish day school system collapses.

Below is a list of some of the approaches that have been taken thus far to mitigate the crisis: increase school enrollment (Aaronson, 2017, August 4); lower tuition (Aaronson, 2017, August 24); increase reliance on charitable donations (Kelman, 2017); focus on education excellence (Malkus, 2016); control costs, determine and reach school capacity, communal collaboration, mobilize external support, focus on middle income families, and build endowments (Held, 2014). None of these new approaches have worked on a scale large enough to stem the tide of non-Orthodox Jewish day school enrollment attrition. Each community has different needs and challenges. Thus, to complicate the matter even further, the solution is based on the context of each community, and what works in one city may not work the same somewhere else. With solutions in mind, this literature review will analyze and determine the key factors and conditions that promote or inhibit non-Orthodox Jewish day school sustainability in North America.

The literature review is organized according to five sections. The first section explores and defines the concept of sustainability from an interdisciplinary perspective. The second summarizes the history of Jewish education and Jewish day schools in North America. It provides a foundational context and some of the controversies surrounding Jewish education in North America. Section three examines the factors and conditions that most affect Jewish day school sustainability. Section four examines different methods for combating the decrease in sustainability. Section five revisits the main ideas presented in the paper and discusses anticipated obstacles toward the implementation of sustainability measures. It also points the reader to what is missing from the literature as related to the topic of sustainability of Jewish education in North America. The paper concludes with a summary that revisits the main ideas presented.

Sustainability

Sustainability is defined in the dictionary as,

1. The ability to be sustained, supported, upheld, or confirmed.
2. *Environmental Science*. The quality of not being harmful to the environment or depleting natural resources, and thereby supporting long-term ecological balance¹.

When discussing the future sustainability of a school system, it will be important to begin with an expansive definition of the concept of sustainability. What does it mean when we say a private school seeks to be sustainable, or that there is a crisis of Jewish day school sustainability

¹ <http://www.dictionary.com/browse/sustainability?s=t>

in North America? The literature provides many different aspects of the term that will help us to gain a richer definition that fits the context of Jewish day school sustainability.

In the literature, one finds much discussion on the concept of financial sustainability. A study of private schools in Pakistan defined sustainability as a break-even tuition level (Alderman, Kim, & Orazem, 2003). Here, enrollment was a factor in achieving and maintaining sustainability, but the main idea was ensuring a balanced budget with a tuition rate based on money coming in and money going out. If a school had enough students that could pay a tuition level that met the costs of the school, then it was sustainable. Another way to look at financial sustainability is through the concept of debt. Domar's fiscal sustainability condition states that if the GDP growth rate is higher than the interest rate on public debt then a country will be able to pay the debt back, making the debt sustainable (Tsuchiya, 2016). Through the Domar fiscal sustainability condition, we add a new dimension to sustainability with the idea that sustainability includes an ability to pay back money that is owed.

The concept of sustainability has also been related to school sustainability. Patrick Bassett defines school sustainability as a primary change in the board's role "to secure the future of the school" (2010, p. 11). The key function of the board is no longer about leading a school towards excellence, improving the perceived value, increased spending, and consistent tuition increases. Rather it is about the board "starting with an economic assessment of the community's capacity to pay" (p. 11) and determining the best academic program that fits the financial capacity of the community. In this understanding of sustainability, there is a strong focus on the economic needs and abilities of the paying customers. If the community can pay the tuition then the school is sustainable. Elsewhere, school sustainability is seen as maintaining "institutional

enrollment health” (Erdmann, 2002, p. 58). This is in contrast to the focus on a tuition level that meets the needs of the school and community. According to Erdmann, if the school can maintain a healthy enrollment then it is considered sustainable.

Sustainability is also understood in the context of development and the environment. Konopnicki defines sustainable development as “Development that meets the needs of the present without compromising the ability of future generations to meet their own needs (2009, p. 44). Other authors see it as an imperative that business schools teach their students to positively contribute to the sustainable development of the future (Kolb, Fröhlich, & Schmidpeter, 2017). There is more than one level of sustainable development and there are authors that help us to further understand the concept of sustainability by looking at it as a continuum.

There are three significantly distinct types of approaches to corporate sustainability among respondents: sustainability leaders, environmentalists and traditionalists . . . The results suggest that there are substantial differences with regard to the motivation for and the implementation of corporate sustainability that are covered behind the corporate rhetoric of a high commitment to sustainability (Hahn & Scheermesser, 2006, p. 150). While many businesses see themselves as working towards sustainable development, their understandings of what that sustainability looks like differs. Additionally, organizations and corporations will have differing motivations that lead them to sustainable practices (Schaltegger & Burritt, 2018).

Some research views school sustainability not in terms of sustainable development and financial sustainability, but rather in terms of becoming more environmentally sustainable in the practices of a school or business. “Concern for the environment motivates sustainability efforts”

(Chapman, 2014, p. 20). There is some overlap between environmental and financial sustainability. There are environmental sustainability measures that can result in long-term financial savings. Additionally, some schools may market themselves as environmentally conscious as a marketing strategy to increase enrollment. While the overall goal of environmental sustainability relates more to environmental impact, there are times when environmental sustainability strategies help with the financial sustainability of a school.

We can look at sustainability beyond its financial and environmental meanings. There is also a social dimension. “Both academics and practitioners have argued that for development to remain sustainable, it must simultaneously satisfy environmental, social and economic standards” (Brunoro, Bolis, & Sznelwar, 2015, p. 644). Elements of work that make up social sustainability include, “Job assurance and stability; occupational safety and health: Safe clean and healthy environments; consideration of the contents of the Universal Declaration of Human Rights and Declaration on Fundamental Principles and Rights at Work; and decent work” (Brunoro et al., p. 649). The theory postulates that without adhering to the social elements above, a company is not able to consider itself sustainable. Being environmentally and financially sustainable is not enough if social sustainability is not taken into account.

Michael Fullan writes about leadership sustainability. For Fullan, leadership sustainability is related to the idea of a leader staying in his or her job and a reduction in leadership turnover. He adds to our concept of sustainability by proposing the theory that certain pre-conditions must exist in order to enhance the chances for sustainability to occur.

“Sustainability involves transforming the system in a way that the conditions and capacity for continuous improvement become built-in within and across the tri-levels of reform” (2003, p.

91). While continuous improvement may or may not be related to school sustainability, it forces us to consider the idea of necessary preconditions for school sustainability. It may not be enough to just focus on tuition levels or enrollment health, rather, we may need to also consider other external conditions that lead to school sustainability.

Of yet, we have not discussed the concept of time. How long must a school have a healthy enrollment, be able to pay off its debt, have a tuition that its constituents can pay, etc., in order to be considered sustainable? One set of researchers determined the following ideal conditions to promote sustainability at work, “To be effective, organizational policy should strengthen worker participation and autonomy, be sustained over time, and should combine different measures of medium intensity for behavior change, instead of isolated policies of high intensity” (Garcia-Mira et al., 2017, pp. 1007-1008). Their conclusions point to a need of implementing changes over a period of time when working towards sustainability. Thus, time frame can also be added to our larger definition of school sustainability. Any school that is to call itself financially sustainable must define the time frame over which it is able to remain sustainable.

When developing a definition of Jewish day school sustainability for the context of this paper, there are many facets that need to be considered. We need to try to include:

- The concept of time
- Meeting needs in the present while not compromising the needs of the future
- Being able to pay off debt
- Tuition collection levels that cover a reasonable amount of a school’s expenses
- The idea that there could be different levels of sustainability

- An understanding of necessary preconditions
- Levels of tuition that meet the economic abilities of the community to pay
- Enrollment health

Daniel Held has a definition that includes many of these ideas.

Sustainability: the long-term financial viability of the school—balancing its budget year after year and being able to withstand short and long-term financial challenges including the steady demand for increased financial assistance and need to invest in a quality educational program” (Held, 2014, p. 5).

Within this definition, Held includes the idea of time, ‘short and long-term’, ‘year after year.’ He incorporates to the need to cover a school’s expenses, ‘need to invest in a quality educational program.’ He discusses meeting needs of the present while not compromising the needs of the future, ‘being able to withstand short and long-term financial challenges.’ Finally, he incorporates the ability to pay off debt, ‘balancing its budget year after year.’

While he includes many concepts, there are a few others that need to be added to encompass other necessary ideas of sustainability for this study. First, the definition must also include the concept of a healthy enrollment. If schools are financially sustainable, but losing students every year, then the long-term viability of the school must be questioned. Tied with enrollment is the level of tuition at a school. If the majority of the community is unable or unwilling to pay the tuition then the board must consider how to alter the academic program or lower the tuition to a rate that is more affordable for the masses. With these changes in mind, the definition of sustainability has been slightly modified (my insertions have been bolded):

Sustainability: the long-term financial and **enrollment** viability of the school—balancing its budget year after year and being able to withstand short and long term financial challenges including **an affordable tuition rate**, the steady demand for increased financial assistance and need to invest in a quality educational program.

Before it is possible to apply this definition of sustainability to the future of Jewish day schools in North America, it is important to understand the history of the Jewish day school movement. The next section of this paper will give the reader a historical account of Jewish day schools to better understand the current sustainability crisis within a historical context.

The History of Jewish Education in North America

“Judaism has always embraced the idea that education is the responsibility of the entire Jewish community” (O'Neill, 1981, p. 337). It will come as no surprise that the best way to educate Jewish children in North America has been the source of communal debate for decades. While discussions of how to Jewishly educate in North America have been very common, decisions on how to pay for it were never resolved. “The larger policy question of whether Jewish education ought to become central to the mission of the broader community, rather than be left to the discretion and abilities of individual schools and synagogues, was rarely discussed (Wertheimer, 1999, p. 26-27). Even when it was discussed, very little headway was made as, “The debate over communal funding for day schools and other forms of Jewish education stood deadlocked, leaving partisans embittered and frustrated” (Wertheimer, 1999, pg. 42). Before looking at the financial challenges of Jewish education, it is important to look at some of the historical decisions that have created the Jewish education in North America that we see today.

With an increase of immigrants to the US and Canada in the late 1800s and the early 1900s, the Jewish community was faced with a dilemma of how to teach Jewish values alongside the values of the mainstream American culture. For Sarna, the history of American Jewish education can be seen as “The realization that schools serve as a primary setting, along with the home, where American Jews confront the most fundamental question of American-Jewish life: how to live in two worlds at once, how to be both American and Jewish, part of the larger American society and apart from it” (1998, p. 9). Or, put another way, “American Jewry’s dynamic, complex, and sometimes paradoxical effort to balance the prerogatives of American citizenship with the responsibilities of Jewish distinctiveness” (Chazan, 2017, p. 83). Pomson presented the educational responses to this competing dynamic as two traditions that unfolded: integrationist and survivalist. “The first tradition (integrationist) . . . saw the Jewish school as a bridge to participation in civic and national life. The second tradition (survivalist) . . . saw the day school as a fortress to prevent Judaism being overwhelmed by contemporary society” (2011, p. 713). To answer this challenge, how to be Jewish and how to be American at the same time, two main models of Jewish education were developed: supplementary school and Jewish day school.

Supplementary School

Before delving into the history of Jewish day school, it will be helpful to provide a brief rationale for the supplementary school movement as a point of contrast. One of the key figures in the Jewish education movement in the US in the first half of the 20th century, Samson Benderly, was a fierce opponent of Jewish day school. “He opposed day schools, fearing ghettoization, and he opposed religion in public schools, fearing Protestantization. . . he called for ‘a system of Hebrew schools which our children can attend *after* their daily attendance in the public schools”

(Sarna, 1998, p. 17). There were “day school opponents who questioned the schools’ patriotism and commitment to full Jewish integration into American life” (Krasner, 2011, p. 392).

Furthermore, “strong opposition to communal support came from leaders who argued that day schools served only a narrow band of the population and the interests of particular denominations, rather than the total community” (Wertheimer, 1999, pg. 28).

In the quest to be both Jewish and American, supplementary school advocates felt it was the best model for achieving both. They did not want to raise a generation of Jewish children who did not know what it meant to be American, but they also wanted the next generation of Jewish children to understand what it meant to be Jewish. As a result, “Sabbath schools (a type of supplementary school) functioned as the primary form of Jewish education in America for most of the nineteenth century” (Klapper, 2008, pg. 193).

An additional change also helped fuel the supplementary school movement. The home, which used to be a primary source of Jewish education, was losing its influence on American Jewish youth.

A 1913 study for the US Department of Education . . . observed: ‘The Jewish home which had always been the powerhouse of the Jewish religion lost most of its influence as an educational factor among the Jewish people . . . communal leaders were convinced that the best means for preserving Jewish life on the American scene was to shift responsibility for Jewish education from the home and sanctuary to the Jewish school. To this end, they developed a system of part-time Jewish supplementary schools (Chazan, 2017, p. 94).

After spending the day in public schools, meeting non-Jewish kids, learning secular subjects, and gaining a deeper understanding of American culture, many Jewish children would then go to after-school Jewish education. Supplementary school allowed them to achieve the full public school educational experience as well as allot time towards a Jewish education. “It was generally the case that the number of people receiving some form of religious education steadily increased. One critical factor explaining this increase was the inclusion of girls in nearly all models of Jewish education” (Klapper, 2008, pg. 198). One had reason to be optimistic with this model. Students were able to continue to learn what it meant to be American and even more students were also getting a Jewish education.

Unfortunately, supplementary school was not having the positive impact on Jewish identity that the educators hoped it would have. As can be seen, “In the 1960s and 1970s when the communal agenda was shifting from facilitating integration to concern about assimilation” (Krasner, 2011, pg. 121, in *International Handbook of Jewish Education*). The conversation began to shift from the importance of becoming American, to the importance of preserving Jewish identity. This shift in debate may have also contributed to greater numbers of North American Jews enrolling their children into Jewish day schools to combat assimilation as a day school allowed for more hours of Jewish learning. For example, an ad placed in the *Jewish Week* in 1998 by Avi Chai states, “What one cause should you also support to guarantee the survival of all these causes (of Jewish education and continuity) in the next generation? Jewish Day School Education” (Wertheimer, 1999, pg. 6-7). In the next section we will discuss more factors leading to the growth of Jewish day schools.

For a long time supplementary school was considered a successful model for the Jewish community as the numbers of students enrolled grew to over 500,000. However, today, supplementary school is also having problems enrolling students. “Peaking at 540,000 pupils in 1962, the current enrollment is about 230,000” (Schiff, 2008, p. 2). While this research will not be looking into the sustainability of supplementary schools, it is worth noting the common enrollment challenges shared by both types of institutions.

Jewish Day School

The first modern all-day Jewish schools were opened under the influence of Jewish Enlightenment thinkers in the late eighteenth century, in Berlin and then in other German cities. These schools differed from previously existing institutions for the provision of Jewish education by delivering a curriculum that included both Jewish and secular studies, not just study of traditional Jewish texts, and by being open to all Jewish children (A. Pomson, 2011, p. 714).

What made this school model unique was its effort to teach both secular and Jewish subjects in the same location. Until this moment in time, Jewish schools focused solely on teaching the religious texts. If a student wanted to learn secular subjects, he had to leave the Jewish educational system. The model also expanded to other parts of Europe. For example, the Jewish Free School in England (an example of a school that taught both secular and Jewish subjects during the school day) had over 4000 students in 1899 (A. Pomson, 2011, p. 714). Eventually, the model made its way to North America.

A precursor to the modern Jewish day school in the US was an institution called a charity school. They were tuition-free schools, supported by religious institutions, and they received

financial support from the state government. There were Protestant and Catholic charity schools, and in 1803 there was one Jewish charity school: Polonies Talmud Torah, located in New York City. Early Jewish educators, and the leaders of Jewish charity schools, “believed that Jewish education should emulate the pattern of the general community’s schools, so the Jewish schools covered the same secular subjects as their Protestant counterparts” (Sarna, 1998, p. 10). They taught specific academic skills, such as Hebrew reading, and the rest of a child’s Jewish education took place, “at home, in synagogue, or through an apprenticeship.” (p. 10).

The role of religion in state-sponsored schools fueled many disagreements, but a big change came, “... with the passage of a law in 1842, forbidding state aid to any school in which ‘any religious sectarian doctrine of tenet shall be taught inculcated, or practiced.’ It was the beginning of the end of religion in public schools” (Kraushaar, 1976, p. 30). This caused many challenges amongst the various religious communities. “This was particularly true of Catholics, many of whom bitterly resented the Protestant character of public education in nineteenth-century America” (Tyack, 1974, p. 84). While there was a separation of religion and school, it was felt that there was still a strong Protestant presence in state-sponsored schools. Thus, religious communities had to decide whether to take part in public schools, which taught Protestant values, or to create their own schools, as the Catholic religion chose to do. Sarna calls this the Protestant model and Catholic model (p. 11).

Many Jews took on the Catholic model which “insisted that the only way to maintain a minority religious tradition was through a separate system of religious schooling” (Sarna, 1998, p. 11). While we know very little about them, we know that several separate private Jewish day schools were created in the nineteenth century in the same spirit as the Catholic model. “By 1854

there were only seven such schools” (Kraushaar, 1976, p. 43), and “by the mid 1870s, most Jewish day schools had closed, replaced by Sabbath, Sunday and supplementary schools” (Sarna, 1998, p. 11). Many more years had to pass before the modern Jewish day school movement took hold. “Although the modern Jewish day school can trace its birth to the beginning of the (20th) century, its rapid growth began in 1940. Since then, its enrollment has increased each year (Schiff, 1987, p. 220). More and more Jewish Americans became convinced that the Jewish day school was the best model of education for their Jewish children.

For many, the goal of the Jewish day school was to preserve the Jewish heritage in a non-Jewish society and the “day schools were seen as training grounds for the future leadership of the Jewish community” (A. Pomson, 2011, p. 715). The original increase in students in Jewish day schools in the 1940s and 50s can be attributed to several factors. Schiff mentions, “the zealous activity of a small, selfless group of Orthodox day school advocates, the effect of the Holocaust and of the establishment of the state of Israel on the Jewish consciousness of American Jews, and the influx of Eastern European Jews after World War II” (1987, p. 221). However, “Not all motives were so rosy: in some cities, particularly in the urban Northeast and the South, the schools also served the default function of alternative schools for parents unhappy with desegregated public school systems” (Klapper, 2008, pg. 208). While this reason is seen as negative in today’s cultural climate, it must still be acknowledged as a contributing factor leading to the increase in Jewish day school population.

We can track the increase in Jewish day school popularity through the numbers of Jewish day schools that were opened in the United States. “In 1944, there were 39 day schools in the United States. By 1982 there were more than 550. Today (2002) there are almost 700 schools”

(Alex Pomson, 2002, p. 381). A larger percentage of Jewish students were also getting their education at Jewish day schools going from 10% of the Jewish population in 1982 to 25% of the population in the year 2000 (p. 381).

Pomson (2002) highlights five sets of causes that have contributed to the growth of the Jewish day school movement in North America through the turn of the 21st century. They are the decay of public education, Jewish embourgeoisement, the confluence of multiculturalism and the “school choice” movement, concerns about Jewish continuity, and the high population growth in the Orthodox Jewish community. With the increases in schools and student population, there was great cause for celebration and comfort in the future success of the Jewish day school movement. These gains slowly came to a halt.

Up until now, I have discussed Jewish day schools as a whole. However, there are two main types of Jewish day schools, each with their own unique features and challenges. They are non-Orthodox Jewish day schools and Orthodox Jewish day schools. Before looking at the factors that have led us to the current sustainability crisis, it is also important to highlight some of the unique features of the non-Orthodox day school movement that separate it from the Orthodox day school movement.

Non-Orthodox Jewish Day Schools

This chapter has discussed Jewish day schools as a whole. However, within this group of schools, lies a category of schools that has had a different history, and may have a different future than Orthodox Jewish day schools. These schools are called non-Orthodox Jewish day schools. “The first non-Orthodox day school in North America opened in 1951, some 50 years after the first Orthodox school” (A. Pomson, 2011, p. 716). While not all schools can be

categorized, the non-Orthodox day schools general fall into the following groups: Reform, Conservative, and community.

It took some time for the non-Orthodox schools to gain popularity within their respective communities. “Many non-Orthodox Jews reacted with horror to the development of the day school movement, which seemed to them to counter a century of benefiting from the ethnically (if not racially) diverse classrooms of the American common schools” (Klapper, 2008, pg. 209). One challenge was the perspective of the clergy in non-Orthodox synagogues.

Many Conservative rabbis maintained great faith in the public-school system; many also worried about the potential defection of members who would lose interest in the synagogue if they had no need for its supplementary school . . . Only in the 1970s after a critical mass of schools and enrollments were attained did the consensus swing to support of the day school (Wertheimer, 1999, pg. 20-21).

The idea of a Jewish day school was no less controversial in the Reform Jewish movement. “At the convention of the Reform rabbinate in 1950, a keynote speaker denounced the day schools as an instrument of segregation. . . It took until 1985 for the board of the Reform movement’s congregational arm to endorse ‘the concept of autonomous self-supporting Reform Jewish day schools as a valid educational option’” (Wertheimer, pg. 21-22). As these day schools began to develop acceptance from the community, they had to develop a curriculum that would speak to their constituents.

These schools sought, and continue to seek, to provide a Jewish education for North American Jews that did not consider themselves Orthodox. While most Orthodox families have always seen Jewish day school enrollment as a given, the same is not true for non-Orthodox

families. Thus, non-Orthodox Jewish day schools have had a challenge of finding the right message to entice prospective families to enroll their children. Many of the non-Orthodox schools have attempted to focus on helping students find their identity in the secular and Jewish culture. “The overwhelming impression created by the theoretical literature on liberal day school education is that these schools do indeed promise their students the best of all worlds: a relatively strong general education, and an immersion in core Jewish literacies and behaviors” (A. Pomson, 2011, p. 717). Convincing prospective parents of the importance of a strong general studies education has not been the challenge. Rather, the challenge lies in effectively convincing these families of the equal importance of a strong Jewish education.

For many years, there was success as the enrollment numbers increased steadily. Recently, however, the enrollment numbers have become alarming. In 2013, “Enrollment in the three non-Orthodox school categories amounts to nearly 34,000 students or about 13% of the total number in all Jewish day schools” (Schick, 2014, p. 11). This is down from 19.3% of the total number in all Jewish day schools in 2005 (Schick, 2005). In fact, “The number of liberal day schools and the number of children attending those schools has been in decline since 2003-04” (Rosov Consulting, 2017, p. 4). The reasons for this decrease are quite varied. “Among the non-Orthodox, delayed family formation, intermarriage, and declining birth rates have resulted in a shallower pool from which to recruit. The non-Orthodox marketplace includes fewer and fewer families who intuitively perceive the value of what day schools have to offer” (Rosov Consulting, 2017, p. 4).

These challenges are very real and are having a negative impact on the future sustainability of non-Orthodox Jewish day schools. This paper will now look into these challenges in greater detail.

Challenges to Non-Orthodox Jewish Day School Sustainability

The non-Orthodox Jewish day school world is dealing with many challenges to its future sustainability (Rosov, 2017). The cost of education is one of the main challenges as the average tuition of Jewish day schools continues to go up as the cost for a school to competitively educate a child also goes up (Aaronson, Aug. 4, 2017; Abboubi, 2018; Eis, 2018). This is coupled with a cost of living increase that causes the price of Jewish day school to exact a larger percentage of a family's income (Aaronson, Aug. 4, 2017; Bassett, 2010; Eis, 2018; Prager, 2016). The challenges are not just about money. We are seeing a change in family values as related to Jewish education and living Jewishly. More and more non-Orthodox families have begun to value Jewish education in a Jewish day school context less and less (Drew, 2017; Malkus, 2016). Finally, to add to the complexity, all of these issues are interrelated. Research has shown that a family's financial capacity and ability to pay for tuition is not always predictable. There are other factors which determine a family's ability to pay. For example, the more Jewish connections a family has the more likely it will be to invest in Jewish education as compared to families with a similar income, but less Jewish connections. This was proven in the following study, "Jewish connections increase or decrease the level at which financial capacity determines financial constraints on Jewish education" (Kotler-Berkowitz & Adler, 2016, p. 125).

All of these issues must be carefully considered by each individual community before determining the best course of action to mitigate the challenges to the sustainability of non-

orthodox Jewish day schools. However, before looking at potential solutions, it is important to consider the issues and challenges in greater detail. The next section in this chapter will look at the research around the following issues that are having an impact on the financial sustainability of non-Orthodox Jewish day school institutions: tuition and cost of living, teacher salaries, high costs of a competitive 21st century education, the complex role of financial aid and middle income families, and Jewish values.

Financial Sustainability, Tuition and Cost of Living

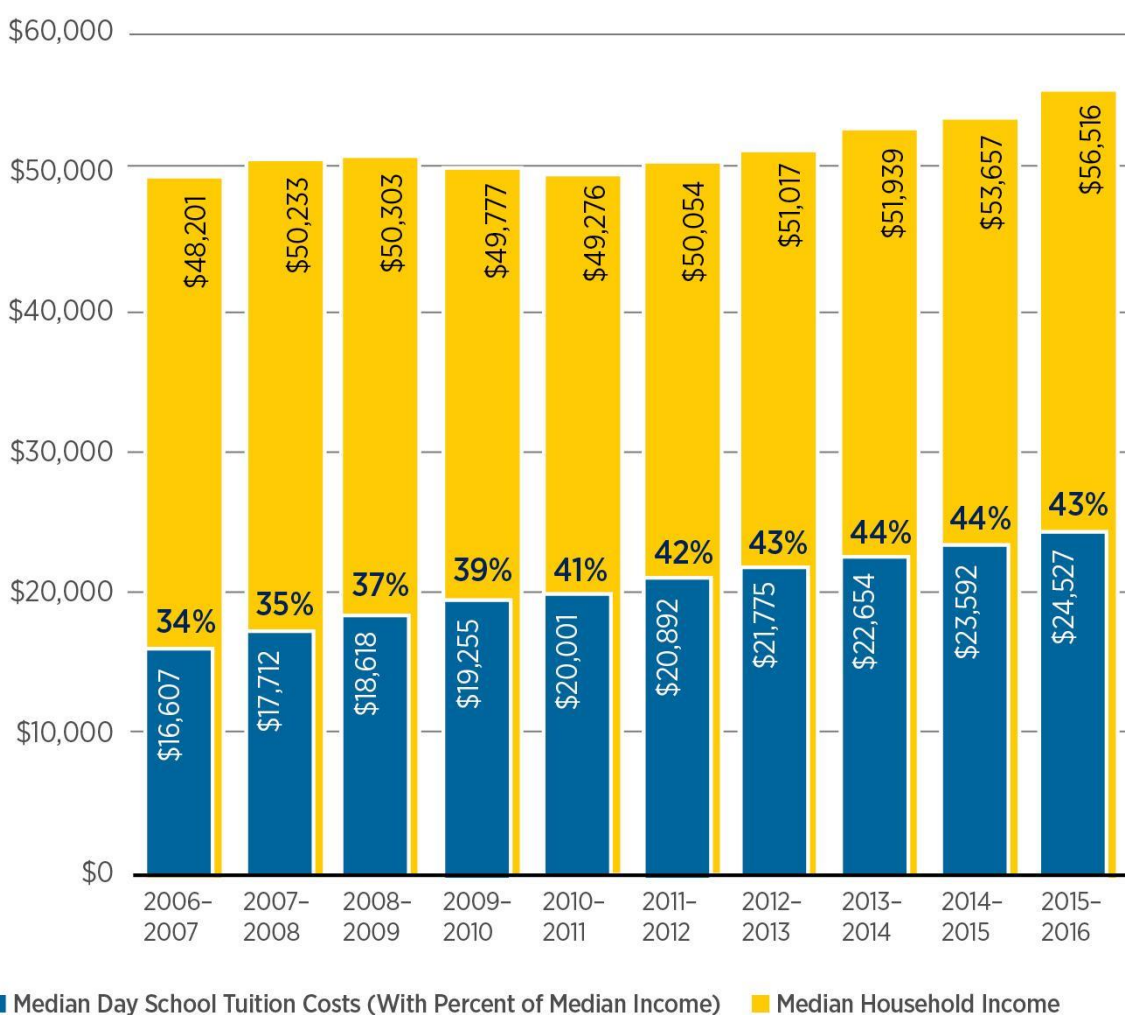
“Day schools are trapped between the competing pressures of affordability and quality” (Rosov Consulting, 2017, p. 5). One of the more complicated issues within the Jewish day school sustainability crisis is the challenge of financial sustainability and tuition. The amount of money a school receives from tuition costs is critical. For example, “In 2001, it was estimated that Conservative and Reform day schools (two examples of non-Orthodox Jewish day schools) covered 90% of their operating budgets with tuition” (Rosov Consulting, p. 8). The remaining costs were covered primarily through fundraising.

Maintaining a tuition level that covers 90% of the operating budget has become more and more challenging through the years. The price for a school to competitively educate its students is rising faster than the rate of inflation and this is not a sustainable model. “Economic viability cannot depend on annual tuition increases that exceed the growth in most families’ incomes, as was the practice for many schools in the years leading up to the economic collapse (of 2008)” (Prager, 2016). As an example, in the 1990s “The median independent school tuition was almost 20% of median family income. Today, the burden is even greater: Median tuition is more than

35% of median income” (Cohen, February, 2013, p. 2). Some studies have the median tuition as even higher than 35% of the median income. This change can be seen below in figure 2.1:

Figure 2.1 – Median Tuition Compared to Median Household Income

Median Tuition Compared to Median Household Income, 2006-2007 to 2015-2016



Source: NAIS, Tuition and Fees, Average Day Tuition, DASL, and U.S. Census, Historical Income Tables: Households, Table H-6. Regions-by Median and Mean Income, May 2017

Figure 2.1. A comparison of household income and tuition of Independent schools from 2006 to 2016 (Torres, 2018).

A higher tuition cost creates a greater financial burden on families. “Tuition costs are a barrier to entry and are becoming prohibitive even for the most committed and most financially secure” (Kardos, 2010, p. 85). We will now look at some key contributing factors to the increasing tuition costs in Jewish day schools.

Teacher salaries. Often, the largest line item of any school budget is salary for teachers and staff. While this was not the case in the past, today’s Jewish day school teachers have salaries and benefits that much more closely resemble what local public school teachers receive. “Schools have gotten more expensive because instead of being paid on the low economic end, teachers are now paid a middle-class salary, competing with the market rate for excellent teachers in that area” (Eis, 2018). A lower salary for teachers would substantially lower the budget at Jewish day schools. However, a lower salary can make it more difficult for Jewish day school educators to send their own children to Jewish day school or to live a middle class life. Additionally a lack of competitive salary will not always attract the best candidates. In order to provide a more financially secure life for day school Jewish educators, and to attract better teaching talent, Jewish day schools made the decision to raise teacher salaries. We can’t ignore the impact this has had toward the cost of educating a child at a Jewish day school.

High costs of a competitive 21st century education. Other major contributors to the increasing tuition are the rising costs in educating a student in the 21st century and remaining competitive with the surrounding public and independent private schools.

The day school field as a whole must meet or exceed the educational quality found in the best public and private independent schools. Our schools must be well rounded with a full range of extra-curricular activities; arts and athletics; programs that include all

student learners; and innovative programs in STEM, robotics, gaming, and other 21st century educational initiatives. (Malkus, 2016).

On top of providing a quality Jewish education, Jewish day schools must also have a general studies education and extra-curricular program that matches or exceeds their local competitors. Doing this is neither easy nor cheap. Prager (2016) expands on the challenge, “Part of the public relations challenge is that contemporary culture celebrates innovative, technology-based, culture-changing businesses and non-profits offering distinctively twenty-first century products and business models.” When a Jewish day school is not successful in this realm, they “appear dated, which reduces their attractiveness and strains their budgets.” In today’s education world, with many quality options for parents, Jewish day schools really have to do everything well. This is incredibly challenging.

When comparing actual costs of public and Jewish day school education, the cost of Jewish day school should not be surprising. “New York and New Jersey currently spend more than \$18,000 per pupil in public school. With its dual curriculum program, a day school tuition in the New York metropolitan area which is in the mid-\$20,000 range is proportional with the geographic K-12 education industry” (Eis, 2017). That does not make it more affordable for families; however, it helps us to understand the tuition level.

The complex role of financial aid and the impact on middle-income families. As Jewish day school tuition becomes a higher percentage of family income, more and more middle-income families have to make a choice of applying for financial aid or seeking a cheaper educational option for their children. For many families, requesting financial aid becomes an emotional choice and not always a choice of practicality. “This (asking for financial aid) can be a

very difficult mental hurdle; if you are a donor to every other organization with which you are affiliated, it is extremely difficult to turn around and ask for help from your children's school" (Cohen, p. 2-3). Despite the emotional hurdle, some families are choosing the financial aid option. Schools are finding more students applying for financial aid. There has been a "50% increase, since 2008, in the number of day school students receiving financial aid" (Rosov Consulting, p. 8). While financial aid can keep more students in the school, the result is that the school has less money for its operating budget and the difference must be made up in increased fundraising or a higher tuition.

At the same time, many middle-class families are electing to send their kids to other, cheaper, schools. The result in many Jewish day schools is what Charles Cohen calls the "barbell" effect. "Students from higher-income and lower-income families are disproportionately represented among the student body" (2013, p. 3) He goes on to say that "The barbell effect impacts a school's health and resilience" (p. 3). Thus, the sustainability crisis has had a disproportionate effect on the middle-class, which is having a major impact on a school's student economic diversity and long-term health. Increasing tuition becomes one solution in dealing with the effects of having fewer middle-class families in a school. Many schools are choosing to focus their efforts on helping middle-class families afford and attend Jewish day school (Cohen, Cohen and Perla, Zar-Kessler) which we will look at in a later section of this paper.

As discussed above in the beginning of this section, the ability to pay the cost of Jewish day school is not the sole determinant in whether a family will enroll its children in a Jewish day school. Values also play a large role in the decision. The next section will explore the

challenging role of Jewish values of non-Orthodox Jewish families in the future sustainability of non-Orthodox Jewish day schools.

Jewish Values

“The economic climate, coupled with the values choices made by non-Orthodox families, make the Jewish day school choice a less likely one for these families” (Kardos, 2010, p. 86). The cost of Jewish day school is closely entangled with the values of a family. “On the one hand, defining affordable day school can seem like a purely financial question about the relationship of family income, average family size, and the cost of day school. On the other hand, this can be hard to define since priority of values and other lifestyle choices . . . all impact a family’s perception of their economic needs” (Eis, 2018). We will now look at the changing values of non-Orthodox Jewish families and the impact the changes are having on Jewish day school sustainability.

There are some that say the high cost of day school has nothing to do with the parental choice to send a child to a non-Orthodox Jewish day school. “Measuring Success’s Sacha Litman has long argued that day school enrollment is driven not by price, but rather by perceived value among parents” (Perla, 2015). Litman defines his concept of perceived value in a blog post quoted here: “What people are more sensitive about now is making sure that, before they buy something, the quality justifies the price... The factors that go into a person’s willingness to pay for a service are financial ability, commitment to the mission, and perceived quality of the service.” Relating this idea to Jewish day school enrollment means that if a family feels the quality of the education justifies the price, then they will enrol their children at the school. If the

family does not feel that the quality or value justifies the price of tuition, then they will not send their kids there.

In addition to the role of perceived value in school choice, the values of non-Orthodox families are changing. “Among the non-Orthodox, delayed family formation, intermarriage, and declining birthrates have resulted in a shallower pool from which to recruit. The non-Orthodox marketplace includes fewer and fewer families who intuitively perceive the value of what day schools have to offer” (Rosov Consulting, 2017, p. 4). In fact, “Jewish schools may no longer fulfill the desires that parents hold for their children” (Drew, 2017).

As a point of contrast, Orthodox Jewish day schools do not have the same challenge. The values of Orthodox families correspond with the heavy majority choosing to send their kids to a Jewish day school.

The Orthodox community, where 81% of parents have a child enrolled in a Jewish day school according to the Pew Research Center, may face different challenges. “In Orthodox schools, the question of sustainability is “how do we make this affordable?” Rabbi Malkus said, “Whereas in community schools (an example of a non-Orthodox Jewish day school), we need to make a values case to parents” (Aaronson, 2017, August 4).

And what is it that non-Orthodox families are looking for? For many, a Jewish education on its own is not enough. There has to be an additional value that will give their children a competitive edge. “Jewish schools need to highlight the Jewish aspects of their programs that provide students with an advantage over their peers in other types of schools . . . emphasizing

this quality and the life-long value it affords students beyond any other high-quality public or private-independent school can be the core of relevant education” (Malkus, 2016).

Studies have shown that Jewish day school can provide these competitive edges. On top of a stronger Jewish identity, a formative Jewish day school will also help students achieve a higher level of confidence in academic abilities in university and “a stronger sense of responsibility towards addressing the needs of the larger society by influencing social values, helping those in need, volunteering their time to social change efforts, and finding careers that allow them to be of service to the larger community as compared with their public and private school peers” (Chertok et al, 2017, p. 3). These benefits align with the values of many non-Orthodox families. However, many do not know about these proven long-term benefits. Instead, they see the immediate costs that impact the ability to have a nicer house or car, or go on a family vacation. “Parents and kids tend to think short-term about school” (Brown, 2018).

Non-Orthodox Jewish day schools have come to realize that they need to make a values case in order to entice families. “Day schools are a particularistic project in a universal world: parents once enrolled their children for many reasons, some of which were about the continuity of Judaism (and the prevention of intermarriage). These ideas are more complicated today. There is a need to articulate the value of a day school education to those for whom it is not intuitive and to those for whom an exclusive Jewish community is uncomfortable” (eJewish Philanthropy, 2017). While they have not determined what the values need to be to entice the maximum amount of families to a Jewish education, many authors have begun to explore this idea (Lehmann, 2014; Buckman, 2014). As time goes on, we will likely see non-Orthodox Jewish day schools marketing focusing on values that align with the non-Orthodox community. Regardless,

the case has been made that the changing values of the community have resulted in less families choosing to enroll their children in Jewish day school.

The increasing costs of Jewish day school, and the changing values of non-Orthodox Jewish families have had major impacts on the long-term sustainability of non-Orthodox Jewish day schools. These key issues have also helped frame the necessary solutions towards positively impacting sustainability of these schools. The next section of this paper examines the many solutions that have been attempted to positively contribute to the future sustainability of non-Orthodox Jewish day schools.

Potential Solutions

A number of initiatives have been tried in order to mitigate against the challenges of non-Orthodox Jewish day school sustainability. To better understand the initiatives, it is important for the reader to recall the definition of school sustainability provided earlier in this chapter:

The long-term financial and enrollment viability of the school—balancing its budget year after year and being able to withstand short and long term financial challenges including an affordable tuition rate, the steady demand for increased financial assistance and the need to invest in a quality educational program.

In order to achieve long-term sustainability, schools and Jewish communities have attempted many things including, but not limited to, emphasizing the values of a Jewish day school education, attempts to increase the number of students in the school, lowering tuition, increasing fundraising, focusing on educational excellence, helping middle income families, increasing the endowment, government funding, cutting costs, and many more. A full list can be seen in

Appendix 5. Some initiatives have been more successful and some have been less. In this section, we will look into several of these initiatives in more detail.

Jewish Day School – A Values Proposition

Researchers have found no evidence of a consistent relationship between tuition rate and enrollment or attrition in the non-Orthodox Jewish day school system (Held, 2013, p. 2). This leads many to believe that non-Orthodox Jewish parents make the decision based on values, not cost. What value do they place on Jewish education? Does it correspond with their own values? Is the expense of Jewish day school worth it based on the family's values and other needs? It should be noted that the same, values-based challenge does not exist in the Orthodox day school movement, "where 81 percent of parents have a child enrolled in a Jewish school according to the Pew Research Centre" (Aaronson, 2017, August 4). For the majority of Orthodox families, Jewish day school is a given, not a decision to be weighed. Contrast that with the fact that "Five out of six day schoolers are in Orthodox institutions, a statistic that is widely at variance with the profile of American Jewry, as demographers report that no more than 10-12% of U.S. Jews self-identify as Orthodox" (Schick, 2009, p. 4). On the negative side for Jewish day school advocates, this means that only a small percentage of non-Orthodox families send their children to non-Orthodox Jewish day school. On the positive side, it means that there is still a large market for these schools to tap into.

In order to convince non-Orthodox families of the value of Jewish education, schools have tried a number of approaches. Some have argued that day school is not about short-term gain, rather the value one sees is in the long term (Brown, 2018). Parents should keep this in mind when deciding on the school for their children. Others have advocated that the right

program will make their school stand out. It is called an educational hedgehog concept.

“Something of widespread appeal, but outside the traditional core of academic subjects and sufficiently splashy to attract broad attention” (Kay, 2017). Kay’s belief is that if you have a program that stands out, it will attract more students to the school. Various organizations have invested in research to prove that participation in day school provides more academic confidence and success for students in university (Chertok et al, 2007). Other selling points include the integrated learning, deep relationships that are developed, and connections to the greater Jewish community. “The answer is rooted in their promise of deep and ongoing learning that integrates multiple dimensions of the child’s identity; their nurture of thick relationships between children, and between children and adults; and—above all—their embeddedness in the local community (Rosov Consulting, 2017, p. 20).

While research has not made a connection between tuition and enrollment, I have also not found a consistent relationship between effective values marketing and increased enrollment. For many people concerned with Jewish day school financial sustainability, the issue is quite simple, schools cost too much. Many advocate an approach that will reduce the price of day school for families (Abboudi, 2018; Cohen, 2013; Cohen and Perla, 2013). This paper will now look into some of these cost-cutting proposals in more detail.

Lowering Tuition

One option to help with Jewish day school sustainability is to keep tuition costs lower. Some schools have tried to lower tuition for everyone in the hopes that a lower tuition will bring more students to the school. This initiative could be particularly helpful for middle-income families who feel they do not have enough extra money to invest in Jewish day school education

for their children, but also don't qualify for financial aid or are unwilling to apply for financial aid.

Recently, a high school in Toronto has cut almost ten thousand dollars from its yearly tuition for all students for the next four to five years (Sarick, May, 2017). The ability to do this came from two donations totaling fifteen million dollars. The result has seen the incoming grade nine class increase from two hundred students to three hundred students in one year (Sarick, December, 2017). While the early stages have shown the program in Toronto to be successful, there are many questions as to the long-term sustainability of the program. At the moment, tuition is just under \$19,000 and will remain at this level through the 2021-22 school year. The following year, tuition could go up to as much as \$22,500 and then \$23,400 the next year. Students that enroll in Grade nine next year (2020) could see tuition go up \$3500 between grade ten and grade eleven (TanenbaumCHAT, 2020). For some families this may be too much. We will have to wait and see if this will have any affect on the current higher enrollment the school is experiencing.

Research on other schools that have decreased tuition to bring in more students is not encouraging. "We have concluded that very few of the programs (that decrease tuition) have led to meaningful increases in enrollment. Furthermore, in the rare cases where a school or community of schools saw a material increase in enrollment, the lower tuition levels were rarely sustainable beyond a few years" (Perla, 2015). Or, "While the schools saw an initial bump in enrollment, this increase came from low-income families and was combined with attrition from previous full-paying families" (Held, 2014, p. 24). Increased enrollment only helps a school if the school recruits enough new students that pay a tuition rate that results in more money coming

in. If lowering tuition results in more families, but less overall money, then the initiative was not successful from a financial perspective.

There is an additional problem with a school-wide tuition reduction. While it makes the school more affordable for middle-income families, the decreased school-wide tuition cost is also the new cost for high-income families. These are families that could have afforded the higher tuition without the need for financial aid. If these families are also paying less tuition then that means less money is coming in. A school-wide tuition reduction has to result in higher enrollment or it will leave the school in greater financial distress than before. For this reason, some schools have tried flexible tuition programs that reduce costs for middle-income families, but not for high-income families. We will now look at this type of program in more detail.

Flexible Tuition and Flat Grant Programs

“Flex tuition programs cap family tuition at a percentage of AGI (adjusted gross income) with a maximum amount for full tuition” (Held, 2014, p. 47). These programs consider a family’s adjusted gross income, the tuition of the school and the number of children the family has. They provide a certain amount that the family will have to pay the school each year, and one that the school considers to be reasonable, based on the family’s AGI. It gives a family a predictable amount they know they will have to pay every year, no matter how many kids they have. A flat grant program is similar, but instead of giving a family a predictable tuition amount, it gives a family a predictable grant amount that varies depending on the household size, AGI and tuition price of the school.

This program primarily targets middle-income families. However, the general consensus is that schools should be considering the financial abilities of all families. “Independent schools

exclusively targeting middle-income families have not had the same success as more comprehensive strategies” (Cohen, February 2013, p. 10). If all of the effort goes toward middle-income families then there is a possibility, “that full payers end up questioning the value they get for their higher tuition costs” (Cohen, p. 8).

Has this program been a success for schools? The results are quite mixed. One school in Canada instituted a flat grant and a flex tuition program. These two initiatives have resulted in very few newly-enrolled students, and, according to the head of school, probably ended up hurting the school financially. (Head of School D, personal communication, June 23, 2018). There are other schools in Pittsburgh and Boston that have seen greater success with the program. (Cohen, February 2013). Experts encourage an aggressive marketing plan so that the community will know these programs exist. Schools must also carefully consider what the community can afford. “If your financial aid is not calibrated to what parents can actually afford, you are not collecting as much as you can from some parents and may be overburdening others” (Cohen and Perla, 2013, p. 4). In the end, flex tuition and flex grants offer another set of solutions that are dependent upon the community and have had mixed results.

Government Funding

“Many assert that the only way to build a robust, financially sustainable day school system is by making use of government funding” (Held, 2014, p. 36). As the Jewish community seeks other sources of revenue, government funding is very enticing. Many argue that families that enroll their children in private Jewish day school are already paying the government for schools that they are not using through their property taxes. “Parochial school parents pay real estate taxes that support public schools, and it is only fair that a portion of those tax revenues

support education of their children” (Prager, 2016). Other editorials also share the opinion that there should be a larger focus on government funding to help families cover the cost of tuition. (Abboudi, 2018; Aaronson, September 24, 2017).

Through advocacy there has been success in acquiring government money. “Government support for Jewish schools has already brought significant relief to Jewish day schools in Florida, Pennsylvania, Wisconsin, Arizona, and several other states with school choice programs” (Aaronson, September 24, 2017). Many provinces in Canada also provide funding towards Jewish day school education.

However, not everyone is in favor of this idea. “Jews have traditionally opposed government funding for parochial schools, on the grounds that our safety as a minority religion in America depends on the high wall separating church and state” (Prager, 2017). Additionally, there could be “strings attached to government funds that may influence the philosophical and educational orientation of the school” (Held, 2014, p. 36). Many say that the potential risks associated with government funding are not worth the positive outcomes it would also bring. Thus, similar to the other day school sustainability solutions discussed before, government funding has its advantages and disadvantages and is not guaranteed to solve the crisis in a way that is seen as positive and sustainable for everyone.

Cutting Costs

One obvious way of positively supporting the long-term sustainability of Jewish day schools is to find ways to make them less expensive to operate through cutting costs. “Beyond finding new philanthropic dollars, new business models and education structures can bring down costs without sacrificing quality. These include pooling costs among multiple schools, scaling

tuition, blended learning and other innovations” (Franklin, 2018). Educational thinkers have also advocated for reducing administrative costs, which can account for anywhere from 31%-52% of a school’s overall budget (Bloom and Perla, 2013).

Some schools have tried to cut costs through collective purchasing, sharing a campus, and school sharing of staff for operations such as admissions and marketing (Held). While these initiatives have resulted in saving some money, it is important to note that, “salaries of administrators, faculty and support staff account for 70 to 80 percent of day school budgets. A meaningful reduction of expenses can only be accomplished through a rethinking of human resources” (Held, 2014, p. 11). In order to more meaningfully cut costs, schools need to examine the problem from the perspective of the people that work at the school.

Blended learning. One cost saving measure that is being proposed by many Jewish educational thinkers, and may also improve the overall educational quality of the school, is blended learning. The definition of blended learning is a formal education program in which a student learns:

1. at least in part through online learning, with some element of student control over time, place, path, and/or pace;
2. at least in part in a supervised brick and mortar location away from home;
3. and the modalities along each student’s learning path within a course or subject are connected to provide an integrated learning experience²

² <https://www.christenseninstitute.org/blended-learning-definitions-and-models/>

The supporters of blended learning come from beyond the Jewish day school world as well. “Federal agencies, state and district education boards, charter school organizations, commercial vendors, reform advocates, and foundations have identified blended and online learning as opportunities for increasing access, improving education and/or containing costs” (Siskin, 2018, p. 5). There are several ways blended learning could cut costs at a school. “Cost-savings could potentially result from increasing the student/teacher ratio, reducing the need for staffing “tiny” classes for small numbers of students, and/or expanding curricular offerings without adding faculty” (Siskin, 2018, p. 6). Unfortunately, “It is not yet clear whether blended learning . . . will be able to impact affordability in a substantial way through either lowering costs or improving education” (Cohen, April 2013, p. 6). In addition, “Professional development, facility upgrades, and new staff may all be necessary to implement blended learning. Cost saving may only appear after a few years of running the new model” (Cohen, p. 16). While blended learning remains a very seriously considered solution to the long-term sustainability crisis in the non-Orthodox Jewish day school world, we do not yet know if it will solve the problem.

Communal Dues, Federation Contributions, and Endowments

Initiatives to positively support Jewish day school sustainability do not all have to come from the parents or the schools. There are some who advocate for the Jewish community, as a whole, to take a bigger role in the future success of the Jewish day school movement. This could take many different forms. Some urge the wealthiest in the community to donate a portion of their net worth to Jewish education (Kelman, 2017). Others describe a community fund, or Kehillah fund, that all Jewish members of the community would have to donate to (Aaronson, September 2017; Eis, 2018). “A Kehillah Fund raises money from the general community (the

Kehillah) for Jewish day school education and distributes some or all of that money directly to day schools” (Cohen, 2012, p. 3).

Still another approach would entail the regional Jewish federation creating an annual campaign that directs funds to the local Jewish day schools (Held, 2014). In fact, Jewish federations have begun to direct more of their money to Jewish education.

Today, Jewish education and engagement is the cornerstone of federation work. . . . Of the approximately \$380 million spent on Jewish education and engagement annually, 24%--about \$90 million--is directed towards day school education With an interdependent network of partners, Jewish federations are strategically developing intentional education: Experiences and opportunities to think about, explore, and otherwise do Jewish to fill the void of what once was incidental to bring Judaism to life in our ultra-secular culture (Pava, 2019).

By investing more money into the Jewish day school educational system, Jewish federations are helping the sustainability crisis by providing more funds for schools to use. While this is very helpful for the Jewish day school system today, these funds cannot be relied on forever. It can be difficult to predict the needs of the Jewish community in the future, and Jewish federations may not always direct such a large percentage of their funds to Jewish day schools. This is one of several areas of controversy which will now be discussed.

While all of these ideas sound promising, there are many concerns with their implementation. First, it is impossible to force members of the community to contribute to this communal fund. Second, many communities have more than one day school with different costs to run the school, as well as different financial needs. It will be very difficult to determine a fair

and equitable way to disperse the money to each school as well as to determine how the money should be used. Third, not all Jews in a community feel that Jewish day schools are the most important institution to fund in the community, and may be less inclined to donate.

The community of Chicago has set up one such Jewish day school fund. They then allocate the funds to the local Jewish day schools based on enrollment. There are approximately 1500 regular contributors to the fund out of a Jewish population of 292,000 people. The contributions total \$80,000 monthly, which comes to about \$350 per Jewish day school student a year. “While the Fund’s \$350 per student allocation makes a difference . . . it isn’t enough to measurably impact day school tuition in the Chicago area (Aaronson, September 2017). In order to be more effective, many more people would have to contribute to the fund.

Endowments. Some individual schools and communities have attempted to raise funds for an endowment. The premise behind an endowment is to collect enough money that the interest gained on the total is enough to make a substantial impact. The “interest from this endowment is distributed to schools according to a variety of different calculations” (Held, 2014, p. 35). Endowment money can be used “to be ready for emergencies, to fund new initiatives, to alleviate pressure on the annual campaign, and to facilitate affordability initiatives” (Rosov, 2017, p. 9). Many schools in the independent school movement have been building endowments for decades. Jewish schools have not been doing this for as long so, to make a larger impact, they often raise the funds as a community, not an individual school. Because an endowment only makes use of the interest earned, an endowment must be quite large in order to be impactful. For example, Montreal is attempting to raise 100 million dollars in order to have enough money to make a systematic change in their Jewish day school system (Cohen, 2012). Because very few

communities have set up endowments, they are not an immediate solution, but can be implemented for communities that are trying to think more long-term.

Potential Solutions – Final Thoughts

Every year there are new initiatives that are tried. Some work better than others, and all of them depend upon the context and conditions of the individual schools and communities. What works in one place will not always work in another. Due to their limited scope and effectiveness, non-Orthodox Jewish day school sustainability remains a real concern. Until a comprehensive solution is developed, the system continues to be at risk.

Additional Challenges to Non-Orthodox Day School Sustainability:

Leadership and Jewish Education in the 21st Century

21st Century Education

The 21st century has brought about many changes to the world of education. “The advent of the information age has encouraged an atmosphere conducive to educational reform. The positive educational reforms are those that developed innovative systems that will equip all students with the necessary skills to be successful in the 21st century” (Heinrichs, 2016, pg. 37). For example, the United States created an entirely new framework called the Common Core State Standards Initiative. It focused not just on what students need to know, but also what they need to be able to do (Common Core State Standards Initiative, 2014). Many books and articles have been written about the skills students need in the 21st century to be successful. These skills include: critical thinking, creativity, collaboration, communication, information literacy, media literacy, technology literacy, flexibility, leadership, initiative, productivity, and social skills (Applied Educational Systems). While some of these skills have always been a part of education,

there are many new skills that make the world of education more complicated and new for teachers that were trained before the 21st century.

School Leadership in the 21st Century

The 21st century has not just impacted the teachers and students of the schools. Due to many changes in the concepts of education, the leaders of schools have also taken on larger roles within schools. For many years the school principal was thought of as a manager. Today, we can add the term leader to the necessary description of a school principal (Ediger, 2014). Further expanded by Raj: “Perhaps one of the major changes in the principalship has been the range of expectations placed on them and these expectations have been moved from the demands for management and control to the demand for an educational leader” (2017, pg. 1). Principals have to now have a more diverse set of skills to be successful and effective in their roles as both managers and educational leaders. It is not always easy to be both. Many books have been written that highlight the new frameworks and skills that a school leader must know and apply to be successful (Hoyle et al, 1998; Bolman and Deal, 2003). Time will tell if it is feasible and sustainable for school leaders to successfully be all of these things at once.

With these new sets of demands comes a new challenge of properly preparing principals for the role. “The findings indicate that leadership preparation and training are central to school effectiveness and school improvement . . . principals can make significant contributions to schools achieving the educational goals and improving leader performance, if they are adequately prepared for their leadership role” (Raj, pg. 7). With an increase in demands placed on school leaders, principal preparation programs will need to revisit how they train future principals. The role has become much harder, more complex, and much more demanding. The

leadership role in Jewish day schools has also become more demanding which we will explore in the next section.

21st Century School Leadership in Jewish Day Schools

“Jewish day school leadership is growing increasingly complex” (Taubenfeld Cohen and Cappell, 2018, pg. 14). In light of this, recently there has been a lot of new research into the growing complexity of the role of leadership at Jewish day schools including a recently commissioned study (Rosov, 2018) and an entire issue of HaYidion magazine devoted to the topic (Winter 2018). There is extreme turnover at the senior leadership positions of Jewish day schools which makes it very difficult for school leaders to reflect on accumulated experience as they are given little time to accumulate any sort of experience. The field seeks to determine how to better prepare leaders to be sustainable in their leadership roles (Rosov 2018). The Rosov study found five capacities that are necessary to the success of Jewish day school leadership:

- Vision or direction-setting
- Personnel development and empowerment
- Organizational management
- Instructional leadership
- Community-building

While some of these are related to the traditional managerial role of the school principal, we also see many roles that fall into the category of leadership found in the 21st century school leader. Many of these capacities can be learned and developed. “Although the work of school leadership may be getting harder, there is an accumulating body of research--evidence that the competencies of school leadership can be cultivated over time, through well designed training”

(Rosov, 2018, pg. 7). These learning opportunities exist and many of the leaders are enrolling in these programs. “Today there are many programmatic opportunities for Jewish day school leaders to develop the capacities and dispositions needed to run schools well” (Rosov, pg. 7). However, learning and implementing these skills is not enough.

In a summary of the Rosov study, the researchers highlight an additional challenge, one that can't be easily learned. “The most experienced school leaders explained to us that in order to be successful as a head of school, it wasn't only a matter of being able to *do* certain things, one has to *be* a certain kind of person too” (Pomson and Gonshor Cohen, 2018, pg. 11). Knowing how to be effective in the capacities described above will not always lead to a successful leadership tenure. The research came across 15 additional dispositions Jewish day school leaders need including self-awareness/reflection, humility, self-management, time-management, strategic thinking, curiosity--inquiry stance, lifelong learning, creativity, ambition, leadership presence, honesty--trust building, integrity--ethical/moral, emotional intelligence/ empathy, clear communication, and calling and commitment to the Jewish people. “The dispositions may be more important as components of successful school leadership than any of the capacities” (pg. 11). For all of us, the level of our abilities to express these dispositions come as innate character traits. Either we have a high capacity to express them or we don't. However, “there is good reason to consider how, through coaching and other interventions, school leaders can be helped to develop these dispositions, especially those that enhance the building of community in schools” (pg. 13). The study ends by suggesting that the systematic development of dispositions become a more present feature in leadership development programs.

Having a strong leader is important to the success of any school. The 21st century has made it that much harder to be successful and remain in the role for a long time. This has impacted both the parochial and non-parochial schools. In time, more research will propose new ways to navigate this ever increasingly complex field. We have seen how the 21st century has affected general education and leadership preparation. Next, we will examine how these 21st century challenges impact the world of Jewish education.

The 21st Century and Jewish Education

On top of educational changes to the general educational community, the 21st century brought about social and educational changes within the Jewish community and Jewish education specifically. Wertheimer highlights some of the main changes affecting the current Jewish educational landscape:

Enrollments in formal Jewish education by school-age children have declined significantly . . . Moreover, as Jews today are settling at an ever greater remove from centers of population, a great many schools are enrolling small student bodies . . . The delivery of a good Jewish education to such a far flung student population poses a new challenge to educators. (2011, pg. 1088-9).

There are fewer students and they are spreading out over a broader geographic region. All of these smaller schools still need administrators and teachers for these smaller schools and smaller classes. Thus the costs remain the same, but the collected money from tuition becomes less. Often, the challenges to school sustainability increase as the schools become smaller. Combining these sociological changes with the complex educational changes occurring in the 21st century

make it significantly more difficult for Jewish schools to meet the needs of all of their constituents.

Educational changes, smaller student populations and a geographically spread out community are not the only changes taking place to the Jewish educational landscape. Modern parents are starting to view Jewish education less as a necessity and more as an added value. “Jewish education is increasingly seen as a commodity and families have assumed the role of consumers” (Wertheimer, 2011, pg. 1089). As consumers, parents have become more specific in their expectations and desires placed on schools dedicated to Jewish education. Schools now have to provide a more diverse education for a smaller group of students and, in addition, now they also have to provide education for the parents. “Increasingly, day schools and supplementary schools have been pressed to attend to Jewish educational and communal needs of parents both because they want to enlist parents as partners in the enterprise of educating their children and also because parents are looking to the school for their own continuing Jewish education” (Wertheimer, pg. 1090). Schools are now more increasingly finding themselves in the job of child *and* adult education (Pomson and Schnoor, 2008). This only adds to the already high number of expectations placed on Jewish day schools.

With an increase in academic and social expectations placed on schools, one would think that parents would understand that it won't be as easy for schools to meet the needs of the students and parents as efficiently as before. However, that is not the case. In addition to meeting a greater diversity of needs, schools are also being held more accountable for achieving these goals. “Even as schools must contend with these new parental expectations, they are also held accountable for the outcome of their programs in relation to the Jewish identities of the children

they educate. In this sense, they have become victims of rising communal expectations” (Wertheimer, 2011, pg. 1090). Thus, with “heightened expectations of success, there is no way to know whether Jewish education can accomplish what outreach proponents demand” (Wertheimer, 2011, pg. 1091).

We must also keep in mind that Jewish day schools, non-Orthodox schools in particular, must also achieve a high level of 21st century general studies education, as well, if they hope to attract the family consumers to their schools. Earlier in the chapter, the concept of perceived value was discussed. Many families looking at non-Orthodox Jewish day school education are also looking for a high level of general studies education in order to view the value of the school to be worth the cost. When they view the value as higher than the cost of tuition, they will enroll their kids and pay the tuition. Since Jewish day school is no longer viewed as a necessity for most non-Orthodox Jewish day school parents, they will also compare the level of general studies education to the non-Jewish schools (both private and public) in the area. If the Jewish day school is not competitive with those schools in their secular studies, then many non-Orthodox families will not consider enrolling their children in the non-Orthodox Jewish day school.

Technology

The type of education we see in the schools is also being impacted by the technology of the 21st century. Brian Amkraut writes about the effect of the digital revolution on 21st century Jewish education. He discusses two main impacts:

- (1) In the rapidly changing nature of classroom instruction, both in terms of educational technologies and the evolving relationship between students and teachers as a reflection

of digital culture. (2) In the dynamic impact that the social culture produced by our digital environment has had on religious life in general and in the challenges these changes have already posed to our understandings of Judaism (2011, pg. 601).

The digital revolution is having a profound effect on the nature of classroom education.

The relationship between the student and teacher is going through a major change.

The role of the teacher has traditionally been the gatekeeper of information . . . To prepare our students for the world of today and tomorrow, the role of the teacher has to meet the needs of current culture . . . The science of teaching requires content knowledge, organization, management skills, and detailed planning. The art of teaching is not about possessing an outgoing personality, but making connections to students, parents, as well as connecting the curriculum to the real world in a relevant manner. (Johnson and McElroy, 2010, pg. 2-3, 6)

The role of the teacher is no longer giving information for the students to memorize. With information easily found on the internet, a teacher needs to help the students make sense of the information so that it can be effectively used and made relevant to their lives. This is the new reality for teachers in all schools, both Jewish and non-Jewish.

We are already starting to see the changes. More online material is available and blended learning has a much bigger role in the Jewish education classroom. What education looks like in the classroom is different now than it was in the previous century. There has also been a push to move the student to the center of the learning. “The dramatic change in the current environment is that students themselves play a significant part in helping to shape the very popular culture that, in turn, defines social norms.” (Amkraut, pg. 603). Thus, in order for the learning to be

meaningful, students must have an important role in the educational process. It is no longer about the teacher conveying the material, it is about the experience of the student in learning the material.

We also see an impact the digital world is having on religious life which will change the way we teach and talk about Judaism in the classroom. Amkraut discusses the evolving expression of Jewish life to be one that he currently labels as having personal authority in which people define their own religion (pg. 604-5). This will serve to impact Judaism as a whole and the type of Judaism that is taught in schools. The digital revolution is bringing about an increased focus on the centrality of Jewish identity formation and will force students to reevaluate their relationship with the Jewish community. All of this is happening both in and out of the school system. Thus, Jewish education now must also provide the tools to allow students to meaningfully create identity. As Amkraut puts it, “The vast majority of Jewish education could be more aptly defined as ‘Jewish identity construction’” (Pg. 607).

Educational Planning

On top of changes to the students, teachers, and school leaders, the 21st century could also change how we plan our educational programs. With the changes of the 21st century in mind, Jonathan Woocher discusses a new way to plan for Jewish education. He comments that when sticking with the status quo “ambitious plans are often doomed by the lack of resources to implement them, further weakening the impact of traditional planning efforts” (2011, pg. 250). The world of education is so complicated and if we just focus on the outcome then we will never achieve our goals. We need a certain objective in mind, but Woocher encourages us to focus more on the process itself. This will allow us to plan more effectively in the 21st century.

“Praxis planning is the process of actively addressing an issue with an objective in mind, but no certain sense in advance of how to get there, and using a broad range of analytic, imaginative, and relational skills to gradually steer the process ever closer toward that objective” (pg. 257). This model of not knowing how to get to the objective could be stressful for many of us. Since we live in such a complicated world, there is no longer one clear answer to tackle any major issue or challenge within Jewish education. Thus we need a more flexible approach that allows us to more organically arrive at the best method for propelling the educational system forward.

Final thoughts - Leadership and Jewish Education in the 21st Century

Never before have we seen a world as dynamic and complex as the 21st century. It has unleashed tremendous opportunities as well as new challenges to overcome. In many cases, more of the educational burden is being placed on Jewish schools as families become less and less immersed and interested in Jewish life. Thus, many have begun to value Jewish education less, but also see it as the best hope for maintaining Jewish continuity. It is filled with challenges, but also seen as the solution. Wertheimer puts the future challenges and expectations facing the Jewish education system very succinctly. “Jewish education is seen not only as facing a set of challenges in its own right, but writ large is also touted as *the* solution” (2011, pg. 1101).

In this section, we also saw that the role of school leader has become much more complicated. Thus, his/her ability to have an impact on the school becomes much more challenging as so many different skills must be integrated to be successful. That would include the school leader’s ability to help with school sustainability. Never before have we seen the sustainability of non-Orthodox Jewish day schools so severely challenged, but never before have we seen potential solutions as complex as they are today.

Conclusions

This chapter has defined the concept of sustainability from a multi-disciplinary perspective. It provided a history of the non-Orthodox Jewish day school movement in North America. It examined the key factors affecting long-term financial and enrollment sustainability of these schools. It evaluated the pros and cons of a selection of initiatives that have been developed in various schools and Jewish communities in North America. Finally, it explored the impact of the 21st century on education and leadership.

The future of non-Orthodox Jewish day school sustainability remains unknown. Based on the research conducted for this dissertation, the main challenges appear to be affordability and perceived value. Many different initiatives have been attempted. However, researchers and community leaders have yet to find a tool that works effectively in all communities. There are many examples of programs and initiatives that work to support the long-term sustainability of schools in one community that do not work in another community. The two ideas that are garnering the most attention right now are iCap initiatives and government funding, both of which were discussed earlier in this chapter. However, at this time, it is still unknown whether these ideas will work on a large scale. Additionally, many other experts have written about the need to work on the perceived value of Jewish education. Rather than looking at these as two distinct approaches, it may be helpful to continue to explore the possibility of a hybrid initiative – one that focuses on both cost and perceived value. By engaging with both sides of the issue, schools may find that they are better able to entice a larger group of parents to join the non-Orthodox day school system.

Further Research

There is a very large independent day school network in North America that serves to help schools achieve high academic standards and engage in continuous school improvement. Several different organizations represent these schools such as NAIS in the United States and CAIS in Canada. Many of the schools in these networks have been around for over a hundred years. In that time they have accumulated a wealth of information and developed best practices in a number of private school related topics. This would also include the issue of affordability and long-term sustainability. In the research for this chapter, very few points of intersection between the Jewish day school movement and the independent school movement were noticed. In fact, there were only two (Cohen, 2013; Bloom and Perla, 2013).

It is believed that the Jewish day school movement can learn a great deal from the successes and failures of the independent school system in North America. There may be sustainability models and initiatives that have yet to be considered. Further research into best practices in independent schools is suggested as an additional way to help support the non-Orthodox Jewish day school sustainability crisis.

CHAPTER THREE: METHOD

Purpose

The purpose of this study was to determine the degree to which Jewish day school leaders are having an impact on the sustainability of Jewish day schools, and if their sustainability efforts are a leadership priority. The study illuminated the degree to which Jewish day school leaders are aware of the many sustainability approaches identified in the previous literature review chapter, as well as the degree to which they are focused on implementing them in their own schools. In addition, this study sought to uncover key approaches to sustainability that could positively impact the Jewish day school system and are implemented by private non-parochial school systems as well as other organizations concerned with their sustainability. The study also examined the level at which Jewish school leaders feel they have been effective in their sustainability efforts. The criteria they used to measure their efficacy was also explored. Finally, the research helped to identify the key factors and conditions that inhibit and promote the capacity of Jewish school leaders to focus on the sustainability of their schools.

The chapter will be divided into the following sections: overview of the research design, participants and setting, instrumentation, data collection procedures, data analysis procedures, issues of trustworthiness, delimitations/limitations, and a chapter summary.

Overview of the Research Design

This study was a multiple-case study using qualitative and quantitative research methods. “The key to the case identification is that it is bounded, meaning that it can be defined or described within certain parameters” (Creswell and Poth, 2018, pg. 97). The study was clearly bounded as the data could only come from non-Orthodox Jewish day schools in Toronto. In total,

the case was made up of all eight non-Orthodox Jewish day schools in Toronto. In addition, “Case study research involves the study of a case (or cases) within a real-life contemporary context or setting” (Yin, 2014 as cited in Creswell and Poth, 2018, pg. 96). The interviews and surveys were conducted based on real-life and contemporary knowledge. While the past was explored to understand the present, the current context and reality were the focus of the study. Yin (2014) expands on the criteria for case studies, “Case studies are preferred when the relevant behaviors still cannot be manipulated . . . it also relies heavily on two sources of evidence not usually available as part of the conventional historian’s repertoire: direct observation of the events being studied and interviews of the persons who may still be involved in those events” (pg. 12). There was no attempt to manipulate behaviors in this study. Rather, the goal of the study was to better understand the role of leadership in financial sustainability in non-Orthodox Jewish day schools in Toronto as a whole. Furthermore, the interviews and survey questions were all conducted with individuals who are currently very involved in financial sustainability in their schools; that is, they were all involved in the researched events.

This research was a multiple-case holistic design. Multiple sites were studied (i.e. multiple schools), but analysis took place at only one level - school leaders - which is considered holistic. “In contrast to the embedded case study design, if a single-case study only examines the global nature of an organization or of a program, a *holistic design* would have been used” (Yin, 2018, pg. 52). Additional levels could have been included in this study such as parents, teachers, and students. However, it was felt that school leaders would be the ideal group to study as they have a greater impact on the sustainability practices of a school. The research is thus holistic as it focused only on the global nature of the leaders of non-Orthodox Jewish day schools. Multiple

sites were chosen because “the evidence from multiple cases is often considered more compelling, and the overall multiple-case study is therefore regarded as being more robust (Harriott and Firestone, 1983, as cited in Yin, 2018, pg. 54).

Using the case study method, I was able to better understand the context and the decision making of school leaders around financial sustainability in the non-Orthodox Jewish educational school system in Toronto. In addition, it allowed me to understand the issue from the multiple perspectives of different types of day school leaders.

Participants and Setting

Canada has the fourth largest Jewish community in the world at 388,000 (DellaPergola, 2017), about half of whom live in Toronto. As of 2011, the last formal census, the Jewish population of Toronto was 188,715 (Shahar et al, 2014). To accommodate the Jewish educational needs of the city there are a number of non-Orthodox and Orthodox Jewish day schools in Toronto. This study focused on the eight non-Orthodox Jewish day schools in the Greater Toronto Area. These eight schools are located throughout the city and are affiliated with a diverse group of Jewish religious denominations, Jewish social organizations, educational organizations and accreditation institutions, as well as some that are unaffiliated with any of the aforementioned.

A conscious decision was made to focus solely on the non-Orthodox Jewish day schools of Toronto. While there exist some overlapping sustainability issues between Orthodox and non-Orthodox Jewish day schools, non-Orthodox Jewish day schools also have to contend with the issue of perceived value. In general, this is not an issue in the Orthodox Jewish day school world, as Orthodox parents see the value in day school, notwithstanding any challenges with

affordability. According to a Pew Research Center study, 81% of Orthodox families send their children to Jewish day school. In contrast, when looking at non-Orthodox families, only 30% of Conservative families, 9% of Reform families and 3% of unaffiliated families send their children to Jewish day school (Pew Research Center, 2013, pg. 68). “Across the Orthodox sector, there are more and more families who simply cannot afford to keep all of their children in schools even when they want to” (Rosov Consulting, 2017, pg. 2). Non-Orthodox day schools have to deal with perceived value and with affordability which makes the issue of sustainability more complex and worthy of study on its own.

In the 2009-2010 academic school year there were 5984 students in the non-Orthodox Jewish day school system of Toronto. Enrollment declined every year through the 2017-2018 school year, which had a total of 4636 students. In the 2018-2019 school year, the number rose slightly, for the first time in eight years, to 4669 students (The Julia and Henry Koschitzky Centre for Jewish Education, 2019).

Through a website search and personal connections, I was able to obtain the email addresses of 21 heads of school and professional administrators affiliated with all eight of the non-Orthodox Jewish day schools in Toronto. The anonymous survey was sent to these individuals on February 13, 2019, and they were asked to forward the survey to other school administrators and board members. Follow-up emails were sent to this same group on February 26, 2019, and March 13, 2019. The first survey was completed on February 13, 2019, and the final survey was completed on April 29, 2019. In the end, a total of 23 school leaders responded to the survey. However, due to the anonymity of the survey data, I do not know if all eight non-Orthodox schools are represented in the 23 responses. Of the 23, five were heads of school, ten

were board members, seven were administrators, and one identified him or herself as ‘other’ with the title of treasurer. For analysis purposes, this person was added to the category of board member. In the email, the survey participants were told that the results were anonymous and that they could stop taking the survey at any time if they had concerns.

There were several potential challenges and ethical considerations inherent in the survey. First, it is unknown how many people started taking the survey and didn’t complete it. Failure to complete the survey could be attributed to a number of factors including a computer or human error that prevented the data from being submitted, concerns about the nature of the questions and use of the data. They knew that a vice principal at a competing school was collecting and analyzing the data and may have been concerned as to how the data was to be used, despite explaining that it was to be used for research purposes only. Additionally, despite promises of anonymity and no self-identifying questions, some of the participants may have still been reluctant to take the survey for fear of being publicly associated with their answers. Finally, I was told by one head of school that he did not complete the survey due to concerns and frustrations about the broad scale of the questions.

Following the survey, I sent personal emails to all eight heads of school, asking for a one-on-one interview. The interviews took place in the offices of each head of school. The only people present were myself and the head of school. Each head of school was asked the same set of questions in the same order. The audio of the interview was digitally recorded and then transcribed at a later date. Before beginning, each head of school signed a waiver that explained how the data would be used and that he or she could cease participation at any time. They were told that all names and identifying data would be changed during the formal write-up of the

results. To maintain confidentiality when reporting on the data, all heads of school were identified by a letter that did not correspond to the school descriptions in the next section of this chapter (e.g. Head of School A). Despite the degree of anonymity, it is unknown how forthcoming the heads of school were during the interview. Many of them knew me personally and they may have been reluctant to share information for fear that it would be used against them in the competitive school system. They were promised complete objectivity and anonymity in the write-up, but it is impossible to know how much the personal relationship, school competition, and lack of complete anonymity impacted the data and what the head of school chose to say. The chapter will now continue with a description of each of the eight non-Orthodox Jewish day schools that were part of the study.

The Non-Orthodox Jewish Day Schools of Toronto

Bialik Hebrew Day School

Bialik Hebrew Day School is a Labour Zionist school that has 1218 students from Junior Kindergarten to Grade 8 spread out over two campuses. Based on student population, Bialik is the largest non-Orthodox Jewish day school in Toronto. Their students spend half of the day learning Hebrew and Judaic Studies subjects and half the day learning general studies subjects. The school values include academic excellence, Jewish values and *menschlichkeit* (being a good person), *Tzedakah* (charity), love of Israel, and financial and educational accessibility. The mission statement of the school is:

Bialik Hebrew Day School is committed to providing an exemplary Jewish and General education to children in Junior Kindergarten to Grade 8 from diverse Jewish backgrounds. Bialik fosters a strong Jewish identity that embraces the values of our

Labour Zionist roots – inclusivity, social justice and equality – in a warm and nurturing environment. Hebrew fluency, Yiddish language and culture and a strong connection to Israel and the Jewish people are paramount. Our commitment to Jewish values, academic excellence and innovation inspires our students to become future Canadian and Jewish community leaders (<https://bialik.ca/this-is-bialik/missionexperience/>).

Robbins Hebrew Academy

Formerly called the United Synagogue Day School (USDS) and affiliated with the Conservative Jewish movement, the name changed to Robbins Hebrew Academy (RHA) in 2010. The school self-identifies as a progressive Jewish academy that focuses on critical thinking, 21st century learning, imagination and character. There are currently 395 students from nursery to Grade 8. Up to Grade 5, the students spend half of the day in Hebrew and Judaic Studies and half of the day in general studies. In Grades 6 to 8, the students spend 40% of their time learning Hebrew and Judaic Studies and 60% learning general studies. RHA values include academic excellence, hard work, Jewish individuality, a meaningful relationship with Israel, worldliness, and community. The mission statement of RHA is: “As a progressive Jewish learning academy, we equip students with the skills to think critically, the imagination to think beyond, and the discipline that builds character” (<https://www.rhacademy.ca/about-rha/mission-vision--values>).

Associated Hebrew Schools

Associated Hebrew Schools (AHS) is a community day school based on traditional Jewish values. There are 972 students in nursery to Grade 8 spread out over two campuses. Up to Grade 5, the students spend half of the day learning Hebrew and Judaic Studies and the other half

of the day learning general studies. In Grades 6 to 8 the percentage changes slightly to 45% Hebrew and Judaic Studies and 55% general studies. The school values include 21st century learning skills, a nurturing environment, meeting the needs of individual learners, Torah learning, love of Israel, Hebrew language mastery, celebrating and observing Jewish commandments, and community. The mission statement of AHS is:

Associated Hebrew Schools is a community day school rooted in traditional Jewish values. We are committed to:

- Educational excellence and innovation in both General and Judaic studies;
- Nurturing student learning; and
- Instilling a love of Torah, Israel and the Hebrew language.

AHS welcomes families from across the Jewish community, and is proud to have a student body of diverse learners that represents a wide range of cultures, socio-economic backgrounds and Jewish beliefs (<https://associatedhebrewschools.com/about-ahs/our-mission/>).

Montessori Jewish Day School

Affiliated with the Montessori movement, the Montessori Jewish Day School is the smallest of the non-Orthodox Jewish day schools in Toronto with 120 students from toddler to Grade 8. They integrate the teaching practices of Montessori with the values of Judaism. Due to its small size, MJDS is the only day school in this study that does not receive financial funding from the Jewish Federation of Toronto. They have created their own financial aid program for families in need of financial assistance. The mission statement for the school is:

Embracing the spiritual values of Judaism. Nurturing a natural love of learning. Fostering a respect for self and the world that lasts a lifetime.

Montessori Jewish Day School is an inclusive, pluralistic, egalitarian school dedicated to instilling respect for the individual and for the community. MJDS provides an engaging Jewish educational experience that embraces the diversity of Jewish practice, integrates Hebrew, and responds to a child's natural search for spiritual and intellectual growth.

MJDS educates its students toward becoming knowledgeable and committed Jews and responsible citizens who love Judaism, Jewish culture and Israel

(<https://www.mjds.ca/about/mission/>).

The Leo Baeck Day School

The Leo Baeck Day School (LBDS) is a Reform Jewish day school serving 578 students from Junior Kindergarten to Grade 8. LBDS is also an accredited International Baccalaureate (IB) school in the Middle Years Program (Grade 6-8) and is a candidate for IB certification in the Primary Years Program (JK-5). Up to Grade 5, the students spend $\frac{1}{3}$ of the day learning Hebrew and Judaic Studies and $\frac{2}{3}$ of the day learning general studies. In Grade 6-8 students have an hour a day of Hebrew and Judaic Studies learning. The school values include academic excellence, liberal Jewish identity, community, and tikkun olam (social justice). The mission statement of LBDS is: "Leo Baeck, a Reform Jewish day school, is committed to providing academic excellence in a nurturing community" (<https://leobaeck.ca/about/our-mission/>).

Paul Penna Downtown Jewish Day School

Serving the downtown core, the Paul Penna Downtown Jewish Day School (DJDS) is an egalitarian pluralistic day school with 154 students in Senior Kindergarten to Grade 6. The

model is $\frac{1}{3}$ Hebrew and Judaic Studies and $\frac{2}{3}$ general studies. The values of the school include artistic expression, social justice, diversity, equality, community, a love of Israel, and critical thinking. The mission statement of the school is:

Paul Penna DJDS is a vibrant SK to Grade 6 Jewish day school committed to exceptional academics in a dynamic environment. The school's distinct program integrates Judaic and General Studies while encouraging artistic expression as a tool for learning. Committed to social justice and Tikkun Olam (Repairing the World), we nurture responsible citizens and compassionate, confident human beings. Embracing the values of diversity and equality, the school welcomes students of all Jewish backgrounds (<https://djds.ca/discover/>).

The Anne & Max Tanenbaum Community Hebrew Academy of Toronto

The Anne & Max Tanenbaum Community Hebrew Academy of Toronto (CHAT) is the only high school that was part of the study. It is the community Jewish high school for the Greater Toronto Area with a total of 1017 students in Grades 9 to 12. The core values of CHAT include curiosity, character, connection, community, and contribution. The mission statement of the school is: "The mission of TanenbaumCHAT is to challenge, support, and prepare students to live lives of high moral character, intellectual curiosity, Jewish commitment, and civic duty (<https://tanenbaumchat.org/mission>).

The Toronto Heschel School

The Toronto Heschel School (JK – Grade 8) is an interdenominational Jewish day school with 324 students in grades Junior Kindergarten to Grade 8. Heschel has an integrated and holistic curriculum and the values of the school include learning through the arts, diversity,

Hebrew immersion, citizenship, community, and instilling a sense of wonder. The mission statement of the school is:

To engage and excite every student with expert, inspired and passionate teachers committed to teaching for understanding and mastery by every student.

To deliver a curriculum of academic excellence in General studies integrated with Judaic studies that provide a deep understanding of Jewish history, texts and the Hebrew language.

To safeguard a school community where values of integrity, respect, mutual support, environmental protection/stewardship, and social justice are role modeled by us and expected of all.

To remain an interdenominational, egalitarian religious Jewish Day School, drawing from a wide range of Jewish observance. The school respects each family's choices regarding Jewish observance in the home. The laws of Shabbat and Kashrut are observed in the school (<https://torontoheschel.org/story-people/history-mission>).

Instrumentation

The data for the research was collected through an online anonymous survey sent to school leaders of non-Orthodox Jewish day schools in Toronto, and one-on-one interviews were conducted with heads of school of these same schools. This section will now describe the survey and interview process in more detail.

Survey

An online anonymous survey was developed over the summer of 2018, tailored for the leaders of the schools (heads of schools, administrators and board members). It was determined that this would be one of the best ways to elicit answers to the three guiding research questions of the research project.

- To what degree do Jewish Day school leaders believe addressing sustainability to be a leadership priority?
- What are the various approaches to addressing sustainability reported by Jewish Day School leaders?
- What do leaders of Jewish day schools believe to be the factors and conditions that increase and inhibit their capacity to focus on school sustainability?

A survey sent over email allows any researcher to reach a large number of people in a short amount of time. A total of 16 questions were finalized before formalizing the survey on an online platform. Each question was carefully chosen to give data that would help answer at least one of the guiding research questions. The answers to most of the survey questions were made up of multiple automatic choices. In addition, seven of the survey questions allowed for open-ended answers. On questions that were based on a continuum, there were four possible answers.

The survey questions were then transferred to an online survey program called Qualtrics. The company gives the following description of the Qualtrics program:

ExpertReview analyzes every question in real-time and offers personalized survey design recommendations to boost response rates and get better quality data. It's powered by iQ and applies artificial intelligence and PhD-designed best practices to give you complete confidence before you launch . . . Qualtrics survey software was launched in 2002 as a

way for academics to carry out sophisticated research that previously, online survey tools had been unable to handle because of the complex needs of academic research. It brought to the market advanced survey functionality and analytics, that would previously have taken researchers weeks and months of work, and automated it

(<https://www.qualtrics.com/research-core/survey-software/>).

The program itself gave suggestions on the wording and format of each question for improved results. Qualtrics also allowed for user-friendly editing and formatting. In addition, there is a distribution function that allows the researcher to easily share the survey in multiple online formats. Finally, Qualtrics was able to format the results into tables, charts, and percentages to allow for easier data analysis.

When the Qualtrics survey was ready, a pilot study was conducted with the survey in the fall of 2018. It was sent to one head of school, one board president (who has a PhD in education), one principal and two other administrators. Their feedback was used to edit and improve the survey. The finalized survey was sent to 21 email address of non-Orthodox Jewish day school leaders on February 13, 2019 that were affiliated with the eight different non-Orthodox day schools in Toronto. They were asked to forward the survey to other school administrators and board members. Follow-up emails were sent on two other occasions. In total, 23 individuals responded to the survey.

Disqualified question. Question 15 of the survey asked participants the following question, “Since your time at your current position has Jewish day school sustainability become a greater or lesser priority, or has it stayed the same? (1 = Much greater priority; 5 = The same; 10 = a much lesser priority).” Many of the participants gave answers that did not seem to fit with

the rest of their answers in the survey. For example, some participants discussed in great detail about the challenges of financial sustainability, but they answered question 15 with a rating of 10, meaning that financial sustainability was a much lesser priority than previously. Upon further reflection and review, it was concluded that many of the participants may have misunderstood the number scale on this question. Most other questions in the survey had larger numbers to designate an answer of greater value. In the case of question 15, the higher number was related to a lesser value, i.e. a much lesser priority. I believe that many of the survey takers became confused and, because the surveys are anonymous, I am unable to go back to the survey takers and check for understanding. Therefore, the results of this question were not considered in the findings for the research study.

Interviews

While developing survey questions in the summer of 2018, at the same time, interview questions were created for the heads of the targeted schools. These questions were created to give further data related to the guiding research questions of the study. They were all open-ended questions to give each interviewed head of school the maximum amount of leeway in his/her answers. They allowed the interviewees to go into more depth on the issues of financial sustainability within their schools and the non-Orthodox Jewish day school system of Toronto and North America. In total, nine open-ended questions were asked during the interview.

After all of the survey data was received, an email was sent to eight heads of school to invite them to an interview. Three responded to the email and interviews were quickly set up. The other five heads of school received follow-up emails and phone calls until meetings were scheduled. All interviewees signed a consent form which also included the promise of a \$25

donation to their schools as a form of thanking them for their participation. “It appears that paying incentives does not impair the quality of the data obtained, and it may induce participation on the part of groups who would otherwise be underrepresented in the survey” (Singer et al, 1999, pg. 225). Each interviewee answered the same set of questions in the same order. They were given the questions ahead of time. The interviews were audio recorded and transcribed using an online AI transcription service called Trint (<https://trint.com>).

Transcriptions were then uploaded and analyzed through coding using a program called Nvivo.

With data spread across so many different formats, finding connections can be extremely difficult and time consuming without the right tools. NVivo gives you a place to organize, store and retrieve your data so you can work more efficiently, save time and rigorously back up findings with evidence. Import data from virtually any source – text, audio, video, emails, images, spreadsheets, online surveys, social and web content and more. With advanced data management, query and visualization tools, NVivo lets you ask complex questions of your data so you can discover more and features best-in-class accessibility options for all researchers (<https://www.qsrinternational.com/nvivo/what-is-nvivo>).

The transcriptions of the eight interviews resulted in many pages of data. The NVivo program simplified the analysis by allowing for a much easier organization of the data according to codes. Once the data were organized in NVivo it became easier to find patterns and formulate assertions. The next section will now go into greater detail on how the data were collected and analyzed.

Data Collection Procedures

The qualitative data were collected through one-on-one interviews with the heads of these schools, and open-ended questions within the survey. A total of eight heads of school were interviewed for this study. The same open-ended questions were asked in each interview. The interviews were transcribed and coded to allow for easier data analysis. The quantitative data were collected through a survey to the administrators, heads and board members of these schools. A total of 23 surveys were completed and analyzed. As mentioned earlier, a pilot study had been conducted to identify and correct any potential issues with the survey. The data from the survey were analyzed through quantitative data analysis research methods. The open-ended questions were analyzed through qualitative data analysis research methods.

Survey Data Collection Procedures

The survey was originally sent to 21 email address of school leaders on February 13, 2019 through the distribution function on the Qualtrics program. They were asked to forward the survey to other school administrators and board members. Follow-up emails were sent to this same group on February 26, 2019, and March 13, 2019. The first survey was completed on February 13, 2019, and the final one was completed on April 29, 2019. In total, 23 individuals responded to the survey: five heads of school, ten board members, seven administrators, and one treasurer (which I assume means treasurer of the board). Each survey participant received a written explanation about the survey and reminded him/her of the option to discontinue taking the survey at any time. All surveys were anonymous, and no questions were asked that would

allow the researcher to identify the person filling out the survey or his/her school affiliation.

While it is unknown where the surveys were completed, due to its online nature, it is assumed that all surveys were completed on a SmartPhone or a computer.

The results of each individual survey were printed out to allow for easier viewing when analyzing the data. The Qualtrics program also has a report making function that combines all of the data into one report. This allows the researcher to view the data as a whole. This report was printed out once all of the surveys were completed.

Interview Data Collection Procedures

The initial email sent to the heads of school was sent on April 1, 2019. Three responded to the email and interviews were conducted on April 10, 12, and 16, 2019. After follow up emails, the other interviews took place on May 15, June 4, June 6, June 24, and June 27, 2019. Each interview was recorded with a microphone connected to a computer. I used a program called Audacity to record the interview. Audacity saves recordings in different formats such as .wav or .mp3. It was necessary to have a form of data that could read by any online transcription service. Each interviewee answered the same set of questions in the same order. They were given the questions ahead of time in case they wanted to prepare for the interview. To preserve anonymity and confidentiality, the interviewees were told that their names, and the names of their schools would be changed. All interviews were transcribed online through a service called Trint (<https://trint.com/>). I then compared the transcript to the audio recording to ensure accuracy. Edits were made as needed. Once completed, the transcriptions were uploaded to a program called NVivo for easier analysis through the coding method.

In the next section the data analysis procedures will be discussed in greater detail.

Data Analysis Procedures

Survey

The majority of the survey results consisted of quantitative data. The data analysis for the survey data was done through quantitative statistical data analysis. “In the most general sense, statistics describes a set of tools and techniques that is used for describing, organizing, and interpreting information or data” (Salkind, 2014, pg. 7). This included features such as determining the mean of all of the answers provided and comparing the mean to other sources of data collected from the survey. The mean is, “A type of average calculated by summing values and dividing that sum by the number of values” (Salkind, pg. 465). Occasionally the data were analyzed by looking for the mode, “The most frequently occurring score in a distribution” (Salkind, 466). The data were also compared based on the role of the person filling out the survey. For example, were there similarities in the answers between all of the heads of school? Did the answers of the heads of school differ from the answers of the board members? Did one group (heads of school, administrators, board members, or other) have answers that stood out from the other groups?

There were also several open-ended answers that could not be analyzed in a quantitative way as all of the answers were different. These open-ended answers were organized according to topic to allow me to discern themes in the answers. Similar to the quantitative data, the open-ended answers were also compared with the whole group as well as organized based on the role of the survey taker in the school (head of school, administrator, board member, other).

All of the questions in the survey served to provide answers and insight into the three guiding research questions of this study. When organizing the data, they were also organized to provide answers to the guiding research questions.

One-on-One Interviews

All of the data collected from the one-on-one interviews consisted of qualitative data. The interviews were audio recorded, transcribed and then uploaded into a program called NVivo. Once there, the data were analyzed through the coding method. The coding method will now be discussed in greater detail, followed by information on the specific coding methods that were used for this research.

Saldaña defines a code as, “A code in qualitative inquiry is most often a word or short phrase that symbolically assigns a summative, salient, essence-capturing, and/or evocative attribute for a portion of language-based or visual data” (2016, pg. 4). Coding helps the researcher organize and categorize data. A large text is able to be coded with a word, or short phrase, and then organized in a way that allows the researcher to compare statements in a much easier fashion. Through coding, the data analysis process becomes much more manageable as the data are categorized. “To codify is to arrange things in a systematic order, to make something part of a system or classification, to categorize” (Saldaña, pg. 9). Once the data are categorized, it is much easier to reach conclusions about the data.

There are many different coding methods that could be implemented the first time one codes qualitative data. “First cycle methods are those processes that happen during the initial coding of data and are divided into seven subcategories: Grammatical, Elemental, Affective, Literary and Language, Exploratory, Procedural, and a final profile entitled Theming the Data”

(Saldaña, pg. 69). While there is no one method that is better than the other, criteria for choosing which coding method to use generally depend on the type of research one is conducting and the answers one is hoping to find. These criteria will enable the researcher to choose the coding method or methods that best suit the study.

Three different coding methods were determined to provide the most useful results for this study: Structural Coding, Initial Coding and Values Coding. The first coding method used was the Structural Coding method. “Structural Coding applies a content-based or conceptual phrase representing a topic of inquiry to a segment of data that relates to a specific research question used to frame the interview” (Saldaña, pg. 98). This method proved very helpful in organizing the data into specific topics related to the guiding research questions. For example, any time an interviewee mentioned a sustainability strategy used in his or her school, it was coded as a sustainability strategy making it much easier to view them all in one place. During this round of coding, the data were organized into 15 different nodes, or categories.

The next coding method that was used is called Initial Coding. “Initial Coding breaks down qualitative data into discrete parts, closely examines them, and compares them for similarities and differences” (Saldaña, pg. 115). The interview transcripts were coded, sentence by sentence. Once coded, the researcher was able to look for connections, themes and new ideas that may not have been considered after the round of Structural Coding. “The goal of Initial Coding . . . is to ‘remain open to all possible theoretical directions suggested by your interpretations of the data’” (Charmas, 2014 as quoted in Saldaña, pg. 115). Through the process of Initial Coding, there is greater possibility of seeing new connections that were not considered previously.

The final coding method that was used for this research was Values Coding, “The application of codes to qualitative data that reflects a participant’s values, attitudes and beliefs, representing his or her perspectives or worldview” (Saldaña, pg. 115). Much of the research centers on understanding the perspectives of school leaders as related to financial sustainability. Their perspectives and understandings are based on their values, attitudes and beliefs. Value Coding allows the researcher to identify the core beliefs that underlie what they are saying and why they are saying it. Additionally, by applying Values Coding to all of the interview transcripts, the researcher was able to more easily identify similarities in values, attitudes, and beliefs of all of the school leaders that were interviewed. Many studies employ a process of outside verification to improve the reliability of the analysis of data. There may be a negative consequence in that this study did not employ an additional researcher to code the data to provide greater inter-reliability on the coding analysis process.

Issues of Trustworthiness

A number of measures were taken to enhance the credibility and dependability of the study. First, the survey was conducted anonymously. This was stated in the opening email sent to the survey takers. Second, a pilot study was done to improve the survey. Having multiple eyes examine the survey and interview questions before they were distributed served to help improve the credibility of the study. Third, this study was sent to individuals within the field of non-Orthodox Jewish day school education. This increased the dependability of the study because they are all invested in finding a long- term solution to financial sustainability. Due to this, they were likely to give as much honest and authentic data as possible if it could help the issue, as the

results of the study could directly assist them in achieving their sustainability goals for their schools.

It is also important to discuss how my sociocultural perspective could have mitigated attitudes or biases toward gathering and analyzing the data. My bias is very clear and was made clear to everyone involved in the study: I have a strong belief in Jewish day school education and want it to survive and prosper. The survey respondents and heads that were interviewed were all told that a main goal of this research project is to contribute to the field. The hope is that this only served to increase the willingness of participants to give as much data as possible because financial sustainability is a very pressing issue in the field. That being said, I had to be very careful not to let my bias impact my analysis and presentation of the data. The suggestions will have a direct impact on myself, my family and my community. I had to be sure to exhibit the utmost integrity, by presenting the data as it was and sharing the results no matter whether they are positive or negative for the issue of Jewish day school financial sustainability.

Delimitations/Limitations

Delimitations are boundaries that have been consciously set for a study. They are specific choices that will impact the study and should be mentioned by the researcher.

- The choice to focus only on non-Orthodox Jewish day schools rather than all Jewish day schools. Non-Orthodox Jewish day schools have different challenges to sustainability than the Orthodox Jewish day schools. Orthodox Jewish day schools are dealing primarily with the issue of affordability. Non-Orthodox schools are dealing with the combined challenge of affordability and perceived value of the program they offer. Thus, it was important to separate the two as the potential solutions could be

quite different. Delimiting the study allowed for more specific feedback to the non-Orthodox schools.

- Geographically, the data collection only came from schools in the Greater Toronto Area. It was helpful to survey Jewish educational leaders in one geographic region as they are impacted by more similar cultural, sociological, and economic factors than schools in another city. Additionally, it made the research-gathering phase much more feasible for me.
- The final delimitation was to focus on collecting data from leaders of Jewish day schools that engage in thinking about school sustainability, not all of the constituents of a Jewish day school. There are many different groups and individuals that have an impact on Jewish day school sustainability. However, not all of them have a direct say in the sustainability strategies a school chooses to implement. While all constituents are affected in some way, this study focused on those who are most likely to be part of the decisions a school makes about sustainability, specifically heads of school, board members and administrators.

All of these served to limit the scope of the study in order to make the data collection more feasible. However, there were also potential weaknesses and limitations in the study as a result of the delimitations.

- The data only applies to Toronto. Findings may or may not be applicable to other communities.
- There may be important information to be gained from mid-level administrators, teachers, families and students who were not included in this study.

- I work within the population of the study subjects posing challenges to objectivity that could impact data collection and analysis.

Chapter Summary

This chapter outlined the methods and instrumentation used in this research study. It began with a description of the research design of this study. The chapter then discussed the participants and the setting of the research. It continued by describing the instruments used in the collection of data from both the survey for school leaders and the one-on-one interviews of eight heads of school. The section on data analysis procedures detailed the steps taken to effectively analyze the data in a way that would provide answers to the guiding research questions of the study. The final section outlined any potential issues of trustworthiness that must be considered along with the delimitations taken to make the research study more feasible.

CHAPTER 4 - FINDINGS

Introduction

This chapter presents the results of the study. The study included a questionnaire that was answered by 23 leaders from non-Orthodox Jewish day schools in Toronto (board members, administrators, and heads of schools), and one-on-one interviews with heads of schools from all eight non-Orthodox Jewish day schools in Toronto. Chapter 3 consists of a description of each of the schools as well as a breakdown of the different types of leaders that took part in the questionnaire. Please refer to Appendix 9 for a list of the heads of schools that were interviewed. The guiding research questions provided the frame for the study and influenced every step of the process. Throughout this chapter, the reader will learn about the results as they pertain to the guiding research questions. First, I present the data collected and analyzed for each guiding research question referencing the questionnaire and interview data for each question. Second, after the data analysis is presented, I describe the themes that evolved for each guiding research question, and I then list the findings related to each guiding research question.

In brief, the structure of the chapter is as follows: review of guiding research question number one; a description of the relevant data from the questionnaire; the relevant data from the interviews; and finally an analysis of the data and the findings related to that guiding research question. This is repeated for guiding research question numbers 2 and 3. The chapter ends with a summary of all the findings from the study.

Data Collected for Guiding Research Question #1: To what degree do Jewish day school leaders believe addressing sustainability to be a leadership priority?

The first guiding research question to be answered in this study was: To what degree do Jewish day school leaders believe addressing sustainability to be a leadership priority? The following section will present the relevant collected data related to this question from both the survey and the one-on-one interviews.

Questionnaire Data for Guiding Research Question #1

A number of questions in the questionnaire related to this guiding research question.

- How often do you engage in conversations about Jewish day school sustainability?
- What percentage of your time, when working for the school, do you spend on addressing sustainability?
- Who do you feel is responsible for dealing with the issues of Jewish day school sustainability?
- To what degree do you feel addressing sustainability issues is part of your role and responsibility as a Jewish day school leader?
- In your role as lay or professional school leader you have many roles and responsibilities. What level do you place sustainability strategizing and implementation as a leadership priority within this diverse set of roles and responsibilities?
- What are other priorities for Jewish day school lay and professional leaders? (List as many as you can think of)
- To what extent are each of the following factors and conditions impacting your ability to focus on sustainability

The complete questionnaire can be seen in Appendix 3. This section will now look at each of these related questions in more detail.

First, presented here are data for question 2 in the questionnaire related to frequency of conversations about Jewish day school sustainability. The results can be seen in Table 1.

Table 1

How often do you engage in conversations about Jewish day school sustainability?(Question #2)

Field	Number of Respondents
Daily	2
Weekly	8
Monthly	12
Yearly	1
Never	0
Total Number of Respondents	23

Twelve of the 23 respondents said that they engage in conversations about Jewish day school sustainability on a monthly basis. The next highest was weekly, with 8 respondents. Two respondents conversed about Jewish day school sustainability on a daily basis, and one person engaged in conversations minimally, on a yearly basis. These data tell us that the strong majority

of Jewish day school leaders are thinking about discussing Jewish day school sustainability, at least on a monthly basis.

When these results are further broken down by role at school, the majority of administrators and heads of school think about Jewish day school sustainability on a weekly basis as opposed to the board members who more consistently think about it on a monthly basis (see Table 2).

Table 2

How often do you engage in conversations about Jewish day school sustainability?(Question #2)

Leadership Role	Daily	Weekly	Monthly	Yearly	Total Per Leadership Role
Board member	0	1	9	1	11
HOS	1	2	2	0	5
Admin	1	5	1	0	7
Overall Per Field	2	8	12	1	23

Often board members come together for a monthly meeting. These results may point towards a conclusion that board meetings almost always include discussions pertaining to Jewish day school sustainability. Heads of school and administrators are at school on a daily basis, and the data indicate they engage in conversations about Jewish day school sustainability more frequently.

Another way to look at leadership priorities is to determine how much time a leader devotes to a specific topic. Question 3 of the survey asked just that, what percentage of your

time, when working for the school, do you spend thinking about Jewish day school sustainability? The results can be seen in Table 3.

Table 3

What percentage of your time, when working for the school, do you spend on addressing sustainability? (Question #3)

Field	Number of Respondents
Greater than 50%	3
25-49%	7
5-24%	10
Less than 5%	3
Total Number of Respondents	23

In the figure above, ten school leaders thought about sustainability 5-24% of their time, seven thought about it 25-49% of their time, three school leaders thought about sustainability for greater than 50% of their time, and three thought about it for less than 5% of their time. Overall, 20 of the 23 respondents think about sustainability for over 5% of their time. Sustainability plays a big role in a leader's limited daily time. These data indicate that Jewish day school sustainability is a priority for day school leaders.

Question 4 asked respondents who they felt was responsible for dealing with the challenge of Jewish day school sustainability. A number of options were given and survey takers

could check off all categories they felt were relevant to the answer. The top five results can be seen in Table 4:

Table 4

Who do you feel is responsible for dealing with the issues of Jewish day school sustainability? (Question #4)

Field	Number selected
Jewish Community Leaders	23
The United Jewish Appeal (UJA)	22
Jewish Day School Leaders	21
Me (i.e. the person taking the survey)	19
Jewish Day School Parents	15

Every survey respondent felt that Jewish community leaders were responsible, and all but two said it was also the responsibility of Jewish day school leaders. The question did not ask if they see sustainability as a priority, but it does point towards a high level of collective responsibility towards solving the issue.

These results are further corroborated when asked the degree to which school leaders felt sustainability was part of their roles and responsibilities as a Jewish day school leader, question 5 in the questionnaire. The results can be seen in Table 5.

Table 5

To what degree do you feel addressing sustainability issues is part of your role and responsibility as a Jewish day school leader? (Question #5)

Field	Number of Respondents
To a high degree	14
To a moderate degree	8
To a low degree	1
It is not part of my role and responsibility as a school leader	0
Total number of respondents	23

All but one person agreed, to a moderate or high degree, that dealing with sustainability issues was part of their roles and responsibilities as a Jewish day school leader. This suggests that sustainability is a leadership priority for Jewish day school leaders.

Jewish day school leaders have a number of responsibilities within their roles at Jewish day schools. The next question in the survey sought to determine the level of importance Jewish day school leaders placed sustainability within all of their roles at school. See Table 6.

Table 6

In your role as lay or professional school leader you have many roles and responsibilities. What level do you place sustainability strategizing and implementation as a leadership priority within this diverse set of roles and responsibilities? (Question 6)

Field	Number of Respondents
Sustainability is the most important responsibility of my job	3
Sustainability is a very important responsibility of my job, but not the most important	15
Sustainability is somewhat important, but there are many other more important responsibilities	5
Sustainability is one of the least important responsibilities of my job	0
Total number of respondents	23

The majority viewed sustainability as a very important role, but not the most important role.

Three out of the 23 respondents viewed it was most important and 15 viewed it as very important, but not the most important. Thus, financial sustainability is important to school leaders, but not any more important than other high level issues school leaders are dealing with. When broken down by role, it is interesting to note that none of the heads of school considered sustainability as their most important role at school (Table 7). They probably deal with issues of sustainability more than any other role at a school, but they were also the only group that didn't have a single respondent say sustainability was the most important role.

Table 7

In your role as lay or professional school leader you have many roles and responsibilities. What level do you place sustainability strategizing and implementation as a leadership priority within this diverse set of roles and responsibilities? (Question 6)

	Most Important	Very Important	Somewhat important	Not Important
Board member	1	9	1	0
HOS	0	3	2	0
Admin	2	3	2	0
Overall	3	15	5	0

It is significant that so many administrators (principals, vice principals, deans, business managers) view sustainability as the most important or a very important priority. It would be worth further study to more closely examine the role administrators (excluding business managers), specifically, see their part in working on Jewish day school sustainability.

Question 7 in the questionnaire asked respondents to detail the other priorities for Jewish day school lay and professional leaders. It was an open-ended question and respondents could list as many priorities as they could think of. The results can be seen below in Table 8.

Table 8

What are other priorities for Jewish day school lay and professional leaders? (List as many as you can think of) (Question 7)

Field	Number of Respondents
Quality of education or program excellence	18
Jewish cultural and spiritual continuity, Jewish identity formation	6
Teacher supervision	5
Building sense of community, community relationships and partnerships	5
School leadership	4
Social and emotional wellness	3
Overall school environment	2
Enrollment	2
Parent engagement and education	2
Financial oversight	1
Academic differentiation	1
Tikkun Olam (social justice)	1
Enhancing school environment (e.g. maker space)	1

Board governance	1
Marketing	1
Engaging a broader population of Jewish families	1

Eighteen of the 23 respondents wrote comments related to the quality of education or program excellence. Comments included, but were not limited to, quality of education, ensuring educational excellence, rigorous and appropriate general studies education, education: Judaic and general studies. It became evident from this question that Jewish day school leaders also see the quality of the educational program as an important element of their role as school leaders. Other multiple responses to question 7 related to the Jewish mission of the school, teacher supervision, community building, school leadership, and social emotional wellness. Due to the lower number of these responses conclusions cannot be inferred.

As seen in Table 8, school leaders have other responsibilities beyond sustainability. These other responsibilities take time away from devoting solely to sustainability issues. Question 8 in the questionnaire sought to determine which responsibilities were the biggest contributors to taking time away from devoting to sustainability issues (Table 9).

Table 9

To what extent are each of the following factors and conditions impacting your ability to focus on sustainability? (Question 8)

Field	High Extent	Medium-High Extent	Medium-Low Extent	None at All	Total
Time	10	8	4	1	23

School enrollment	8	10	3	2	23
Finances of the school	9	6	7	1	23
Competition with other schools	4	8	10	1	23
Day to day issues at the school	6	6	6	5	23
Personal education and understanding of the topic	2	9	6	6	23
The academic program of the school	4	7	8	4	23
Governance	4	6	11	2	23
Your personal life	2	2	9	10	23

When combining high and medium high ratings, 18 out of 23 school leaders rated time and school enrollment as having the greatest impact on their ability to focus on sustainability. Fifteen out of 23 rated finances of the school as the third largest impact. When combining medium low and low, the smallest impact was the personal life of the leaders.

This concludes the section on the data from the survey that referred to Jewish day school sustainability as a leadership priority. The survey data show that sustainability is important to Jewish day school leaders. They regularly think about it, and they feel it is their responsibility within their roles to address sustainability. However, due to the many other important roles and responsibilities they have as Jewish day school leaders, sustainability cannot be characterized as the most important role or responsibility that they have. The next section will examine the interview data related to the first guiding research question sustainability as a leadership priority.

Interview Data for Guiding Research Question #1

During the individual interviews with the eight heads of schools, there were a number of open-ended questions that were asked that directly or indirectly related to the first guiding research question: To what degree do Jewish day school leaders believe addressing sustainability to be a leadership priority?

These questions included the following (For a complete list of interview questions, please see Appendix 4):

- How knowledgeable do you feel you are about school financial sustainability? Explain.
- How would you rate your personal level of impact on the successful implementation of sustainability strategies at your school?
- Do you communicate your successes to the greater community? If so, how?
- Do you feel that your school has achieved the goal of long-term sustainability? Why or why not?
- To what extent do you view school sustainability as a major issue in Jewish day school education today? Explain.

One of the interview questions posed to the heads of school enabled them to express their individual importance to sustainability work at their respective schools. In general, responses fell into two categories. There were those who saw their roles as vital to the financial sustainability success of the school, and those who saw themselves as part of a larger group that worked together to think and act upon financial sustainability.

Individual importance. Several heads of school highlighted the individual importance of their specific roles to sustainability.

So to think about where the school was three years ago and to think about where the school is now, without being so arrogant, I think it is one hundred percent because they brought in a different head of school who thought about sustainability in both the way of improving the experience now for recruitment and retention, and thinking about raising money for long-term financial sustainability and short-term budget relief (Head of School A, 2019).

In addition to realizing the important role Head of School A played in his/her school, this head also talked about the aspects and focus of the job related to sustainability including recruitment, retention, fundraising, financial sustainability, and short-term budget relief. They are all priorities related to sustainability. Head of School B also talked about the priorities and roles of the job related to sustainability, and the importance of the role of head of school in achieving the goals of these priorities.

Well, one of the mechanisms towards the financial goals that I'm looking for is fundraising which I'm fully involved with. And our advancement department, in general, which is something that I've been working hard to improve and overhaul. Take the lead in negotiations with the teachers union, so that's impactful. Everything that we do towards running the school and projecting excellence. Because the other big, the biggest driver income source is tuition dollars. So, I think I have a huge (impact). I mean everything everything that I'm involved in relates back to this (implementation of sustainability strategies) on some level (Head of School B, 2019).

We are a team. Another group of heads saw themselves as having a very important role in Jewish day school sustainability, but highlighted the fact that they do this as a team.

Well, I don't think one person is ever responsible for anything. So I think as a team we have done some really good things. And I think the improvement of the education. So I would say that, yes, I drive the bus, but the bus wouldn't be going anywhere unless the people on it were working at it (Head of School C, 2019).

This next head of school highlighted the many different groups that are part of the sustainability work taking place in the school: the school community, the board, and Federation.

I'm very involved in them. Some of the big picture planning was done at a broad community and school level. So when you're talking about millions of dollars in gifts to buy down tuition (i.e. donated money used to lower the tuition rate of the school) that's not the result of any one person. Right? That's the school, that's the board, that's the community. That was a partnership with Federation to do it. So yes I'm very involved in it. I don't know that I can, I certainly can't take credit for the whole thing that has happened (Head of school F, 2019).

Prioritizing through communication. Another way to evaluate priorities is to look at the messages that are being communicated. If a school, or a school leader, is communicating financial sustainability success to the greater community, then it is likely that this is viewed as a priority. Interviewees were asked if they communicate their sustainability successes to the greater community.

It depends on which stakeholders you're talking about. I'm not sure our parents, our current parents, care all that much about it. Community leaders in the community do care. And our leadership, board and so forth, they're certainly thinking about the future, thinking about years down the road (Head of School B, 2019).

For Head of School B, the communication message is dependent upon the audience. Parents may not be as interested in sustainability success stories, but community leaders are. Thus, Head of School B puts the sustainability information into the hands of those that are interested. Head of School F tries to get as many involved in the conversation as possible. At Head of School F's school they market and communicate to a wide audience. There is a clear goal in this strategy. Head of School F wants to communicate with as many people as possible in the hopes that it will result in more financial support for the school.

But we do get annual reports and, with tuition, we put out as much as possible. What exactly it means, what exactly has happened, how, exactly, families are benefiting because what our donors wanted to do was to invigorate a community to pay it forward and pay the money. And so, obviously, we have fundraising targets and fundraising goals and, as the community school, we want the community involved. We want to educate the community and we want the community to support us (Head of School F, 2019).

Head of school H also has a more general communication strategy.

We do (communicate sustainability successes). Basically now it's more online. We used to give out flyers saying what we did, but online, yes. We have our own newsletter, and in that newsletter we put the plans. This is coming up. This is what we'd like to do. Then we say what our accomplishment is. We send thank you notes. All those kinds of things. Yes we share it with our own community for sure (Head of school H, 2019).

There are also times when leaders choose not to communicate sustainability successes as any efforts towards a sustainability strategy could come at the expense of other goals of the school. Thus, school leaders need to be very reflective and purposeful about the messages they

want to communicate. Here is a challenge one head for a multi-campus school found with the communication of sustainability successes.

For five years now we have been in a very tense and shaky both financial and school placement situation. And so I believe that it is not possible for us to have been able to tout the successes when they've come at the sacrifice of other student opportunities to participate in school. So, no, we've been very quiet about them (Head of School D, 2019).

Sustainability as an issue in Jewish education today. During the interviews, heads of school were asked if they viewed Jewish day school sustainability as a major issue in Jewish education today. All of them responded by saying it is the major issue or one of two major issues. Here are some of their responses to the question.

“It's a very big issue. That it's the talk of everybody, right?” (Head of School H, 2019).

“Well I think it's the number one issue. And for a lot of factors. But it is the number one issue” (Head of School C, 2019).

On top of agreeing that it is a major issue in Jewish day school education, this head of school expands on the factors and challenges within the issue.

Yes it's a huge issue. I mean in many ways I think it's the issue. Well, I don't know if it's the issue. I guess the two issues are, one, value proposition. Do enough families and enough people feel like Jewish education is a good idea and is worth it? And then the other question is can people afford it? So I think those are the two issues. I guess they're both sustainability issues ultimately, right? (Head of School E, 2019).

Finally, this head of school acknowledges the enormity of the issue, but ties in the idea that the independent schools are confronting the same sustainability issues. “I believe it is

absolutely a major issue. But it's an issue in all independent schools because, at the end of the day, it's a model about what you can afford to offer based on what you charge" (Head of School D, 2019).

Long-term financial sustainability. With so much time and effort devoted to sustainability, I was curious to know if the heads of school felt that they had achieved the goal of long-term financial sustainability for their respective institutions. The majority of heads said no. Here are some of their comments:

"No . . . Because it's a really hard goal to achieve" (Head of School A, 2019).

"I have no idea. I mean, am I satisfied with where we are? No. But I don't know what's going to happen in the future" (Head of School B, 2019).

"You're always at risk because it's no longer the days where there are a thousand people lining up at your door to come bursting in" (Head of School C, 2019).

"I wish I could say yes. One is that we don't own our own building, and that would be an important piece . . . We don't know, but it doesn't feel like a strong foundation right now" (Head of School H, 2019).

It is important to note that there were two heads that had a more positive answer to the question of longterm sustainability. One of them questioned what "long term" meant and gave this answer:

What's long term? We have a five year plan (that is sustainable) . . . Costs have come down significantly for the four reasons I've mentioned before . . . We have to build a new model of what is going to be and that will depend on how many kids we have, how much donor money we're able to get in that time. So if long term is 20 years, we don't have a 20

year plan yet, but we do have a plan. You have a five year plan. There are three years left and we spend most of our time working towards what the what the period of time after that will be (Head of School F, 2019).

Head of School F felt that the school was, indeed, financially sustainable through the end of the current five year plan. However, now they need to establish a sustainability plan for when the five years come to an end. The other head of school that answered in the affirmative about achieving long-term financial sustainability began by articulating that the school had achieved long-term financial sustainability, but then explained why it might be premature to give a final decision.

I think we have. In so far as we have . . . a core of donors who are committed to the school. I think we've got enrollment levels at the point where operations are pretty sustainable on an ongoing basis. We don't have a significant year over year deficits or anything like that. Yeah I mean it's always a worry right? It's always a concern because you never know how many families are going to need subsidy. You know it does change from year to year. Economic situations can change. You know we're not well in the clear and we'll never have to, you know it's not like we have a hundred million dollar endowment and we'll never have to worry about anything (Head of School E, 2019).

In the interviews, six of the eight heads strongly indicated that they have not achieved the goal of long-term sustainability. The other two heads said yes, with qualifications. The data show that it is something most schools are still working on.

Analysis of Questionnaire and Interview Data for Guiding Research Question #1: To What Degree do Jewish Day School Leaders Believe Addressing Sustainability to be a Leadership Priority?

To repeat, the following questions were asked of heads of schools that both directly and indirectly related to the first guiding research question.

- How knowledgeable do you feel you are about school financial sustainability? Explain.
- How would you rate your personal level of impact on the successful implementation of sustainability strategies at your school?
- Do you communicate your successes to the greater community? If so, how?
- Do you feel that your school has achieved the goal of long-term sustainability? Why or why not?
- To what extent do you view school sustainability as a major issue in Jewish day school education today? Explain.

The interview transcripts were analyzed with a program called Nvivo which helped make the process of coding much easier. Through the analysis process of Structural Coding, Initial Coding and Values Coding (see chapter 3 for more details on these coding methods) completed on all eight interview transcripts, several themes came to light. These themes include the following:

- Jewish day school sustainability is both complicated and important
- The perceived level of personal importance to the financial sustainability of a school varies amongst Toronto heads of schools

- Communication of sustainability successes is important, but must be thoughtful and reflective
- Jewish day school financial sustainability is one of the most important issues in Jewish day school education today
- Long-term financial sustainability of a Jewish day school is a difficult goal to achieve, but not impossible.

When asked through surveys and interviews, the degree to which Jewish day school leaders believe addressing sustainability to be a leadership priority, the data clearly show that leaders believe it to be important from a moderate to a high degree. However, it can't be called a priority because the data do not suggest that the issue is one that stands out above other issues.

First, the importance of financial sustainability to non-Orthodox Jewish day school leaders is demonstrated through the types of conversations they have, the percentage of time they devote to thinking about sustainability, and the messages they communicate to their stakeholders. The interview data showed that most heads of school publicize their sustainability work to the community, and are very thoughtful of the messages about sustainability they wish to publicize. Additionally, the questionnaire data showed that 22 of the 23 respondents discuss sustainability on, at least, a monthly basis and 10 of the 23 respondents discuss sustainability on, at least, a weekly basis. Percentage-wise, 20 of the 23 leaders that completed the questionnaire spend anywhere from 5% to over 50% of their time on sustainability. This is a very high number considering the many other responsibilities Jewish day school leaders have.

Second, leaders place a high burden of responsibility on themselves to tackle the issue of sustainability, and to demonstrate improvement in the sustainability of their institutions. 21 of

the 23 questionnaire respondents view Jewish day school leaders as responsible for solving the sustainability crisis in today's world of Jewish day school education. 18 of 23 questionnaire respondents said that sustainability work is one of the most important aspects of their roles at the school and 22 of the 23 felt that addressing sustainability was part of their role and responsibility as a Jewish day school leader to a moderate or high degree. The interview data suggest that heads of school must be knowledgeable about sustainability issues and have a clear plan for dealing with it today and into the future. Again, school leaders have many responsibilities, but the data from this study reflect that sustainability is one of the issues at the top of their lists of things to do.

Finally, Jewish day school leaders view sustainability as a pressing issue in Jewish day school education today. In the interviews, all eight heads of school identified sustainability as one of the leading issues in Jewish day school education today.

It is clear that school leaders place a high level of importance on Jewish day school sustainability. This study documents two important findings related to the first guiding research question:

Finding #1. Non-Orthodox Jewish day school leaders view financial sustainability as one of the most important issues in Jewish day school education today. During the individual interviews with the heads of schools, all eight heads claimed that financial sustainability was the biggest issue or the second biggest issue in non-Orthodox Jewish day school education today when answering the question, "To what extent do you view school sustainability as a major issue in Jewish day school education today?" Furthermore, by analyzing the questionnaire data of school leaders, we see that due to the high frequency that school leaders engage in conversations

about financial sustainability, the high number of constituencies that they see as responsible for solving the financial sustainability crisis, the high degree of responsibility they place on themselves to address the issues of financial sustainability, and the number of leaders that view financial sustainability as the most important role or one of the most important roles they have at school, we can also conclude that financial sustainability is one of the most crucial issues facing non-Orthodox Jewish day school leaders today. See Figure 4.1 for a graphic representation of these themes leading to the conclusion of the high level of importance of sustainability to non-Orthodox Jewish day school leaders.

Figure 4.1. The Importance of Sustainability to School Leaders

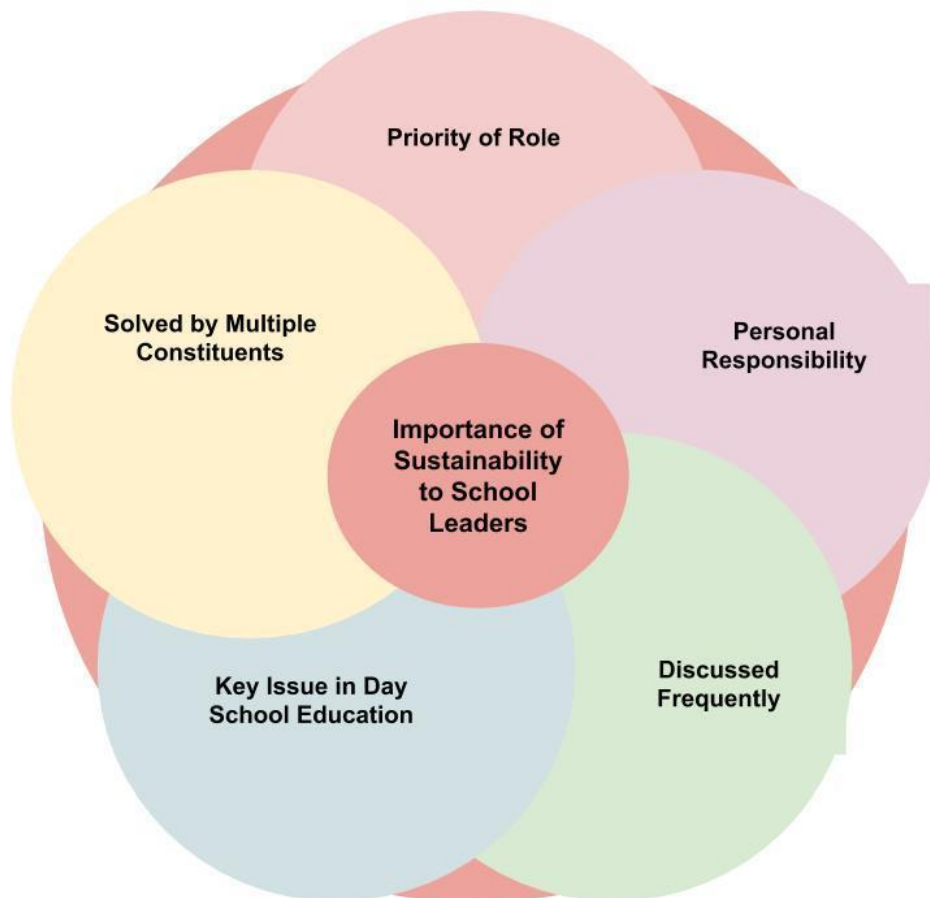


Figure 4.1. Thematic results of questionnaire and interviews leading to the conclusion that financial sustainability is an important issue for non-Orthodox Jewish day school leaders.

Despite its importance, non-Orthodox Jewish day school leaders are unable to focus on financial sustainability to the degree necessary in order to match the level of stated importance due to their many other responsibilities. This conclusion was brought to light in Tables 8 and 9 earlier in this chapter. Leaders have many other responsibilities such as overseeing the academic program, teacher supervision, and community building. These numerous responsibilities take their attention away from devoting to sustainability issues. The biggest impacts were a lack of

time, as well as enrollment, and financial issues. Giving leaders more time, or taking away the issues of enrollment or finances could allow them to devote more necessary efforts towards sustainability.

The data show that financial sustainability is very important for Jewish day school leaders. They regularly engage in conversations about sustainability. They spend a significant percentage of their time thinking about and working on sustainability. They believe that it is their responsibility to strategize and implement sustainability strategies. They communicate their sustainability successes to the community. They see sustainability as one of the main issues in Jewish day school education today. However, sustainability is not the only responsibility in the portfolio of Jewish day school leaders, and therefore they do not consider it their top priority. They have many other responsibilities that they consider just as important as sustainability, most importantly, the quality of the educational program at their respective institutions, but also retention issues, fundraising, and building community relationships. Due to the fact that they have so many other elements of the job that they need to focus on, they are unable to devote enough time to the issues of financial sustainability at their schools.

Finding #2. The majority of non-Orthodox Jewish school leaders do not believe that they have achieved long-term financial sustainability, or will be able to do so in the near future. In the interviews, the majority of the heads of school concluded that they have not achieved long-term financial sustainability. It is a very difficult status to achieve in today's unpredictable economic climate. There were a number of heads who said they had achieved financial sustainability at the current point in time, but were reluctant to conclude that this would remain the case for many years to come.

Data Collected for Guiding Research Question #2: What are the various approaches to addressing sustainability reported by Jewish Day School leaders?

The following section will present the relevant collected data related to this question from both the survey and the one-on-one interviews.

Questionnaire Data for Guiding Research Question #2

In the questionnaire, there were several questions related to this guiding research question.

- What do you identify as the key issues affecting non-Orthodox Jewish day school sustainability?
- On a scale of 1-4 (1=None; 2=Little; 3=Some; 4=Most) please rate the following strategies on the their impact to the sustainability of your school
 - Importance of the Experience
 - Frequency of Participation

For the complete list, please refer to Appendix 3.

First, here are the results for question number 10 in the questionnaire, which asked respondents to identify the key issues affecting non-Orthodox Jewish day schools. This was an open-ended question and participants wrote down what came to mind. Through a process of coding and categorizing the answers, these were the top three results as seen in Table 10.

Table 10

What do you identify as the key issues affecting non-Orthodox Jewish day school sustainability?

Name of Issue	Number of respondents who mentioned it as one of the top issues affecting non-Orthodox Jewish day schools (Out of 23).
Cost and Affordability	15
Values and Commitment (of families and community)	15
Academic Excellence	4

Leaders identified the biggest issues affecting non-Orthodox Jewish day school sustainability as cost and affordability, values and commitment, and academic excellence. However, academic excellence was identified by 4 only respondents, as opposed to cost and value which were each identified by 15 respondents.

Question number 11 in the survey was the longest question in the entire questionnaire. It was a two-part question that asked respondents to, first, rate the importance of a list of sustainability strategies and, then, to rate the frequency at which they implement these strategies at their schools. They were asked to rate using the following scale: 1=None; 2=Little; 3=Some; 4=Most. The list of strategies was compiled through an extensive literature review. In total, 31 sustainability strategies were presented in the survey. A complete list can be found in Appendix 5.

Table 11 lists the average top five sustainability strategies, based on importance, as identified by the 23 individuals that took the survey. The rankings were determined by averaging the scores (1-4) given by all 23 respondents for each strategy. The highest average was

characterized as the most important strategy identified by the school leaders. Yellow is the highest; silver - second; orange - third; there is no fourth because two strategies tied for third; green - fifth.

Table 11

Sustainability Strategies Organized by Importance - Highest to Lowest

Name of strategy	Ave. Level of Importance
Prioritizing an annual campaign and fundraising	3.74
Investing in teacher development to improve the quality of the teaching	3.61
Establishing, or increasing funds to, an endowment	3.35
Paying close attention to retention trends	3.35
Spending money to improve the quality of the current school program being offered	3.26

It should be noted that importance was defined in the survey as the following: how important the school leader feels the action or behaviour is to the sustainability of his/her school. Based on the results, leaders saw fundraising as the most important strategy to employ for the sustainability of their schools. When comparing to the earlier list of key issues affecting the sustainability of non-Orthodox Jewish day schools in Toronto (Table 10), cost was one of the top issues. Fundraising is a strategy that could directly relate to helping mitigate the challenges of cost and affordability, as could the strategy of endowment funds, voted as the as the third most important strategy. Another important issue that was identified by Jewish day school leaders in question 10 in the questionnaire was value and commitment (See Table 10). Investing in the teaching and the program (ranked second and fifth in the list above) are connected to value. If the teaching and

overall program at a school is improved then families could view the value as being higher.

Paying close attention to retention trends indirectly relates to value and commitment if the families identify value or commitment to Jewish day school education as their reason for staying or leaving Jewish day school.

After identifying the most important sustainability strategies, respondents were then asked to rank the sustainability strategies based on frequency of implementation. For the purposes of the questionnaire, frequency was defined as: how often the action or behaviour is offered or enacted. They were asked to rate using the following scale: 1=None; 2=Little; 3=Some; 4=Most. Table 12 includes the top sustainability strategies based on frequency, and also includes the identified most important strategies for comparison. The rankings were determined by averaging the scores (1-4) given by all 23 respondents for each strategy. The highest average was characterized as the most frequently used strategy identified by the school leaders.

Table 12

Sustainability Strategies Organized by Frequency - Highest to Lowest

Name of strategy	Ave. Level of Importance	Ave. Level of Frequency
Prioritizing an annual campaign and fundraising	3.74	3.39
Investing in teacher development to improve the quality of the teaching	3.61	3.17
Paying close attention to retention trends	3.35	3.09
Spending money to improve the quality of the current school program being offered	3.26	3.04
Focusing on marketing initiatives	3	2.87
Establishing, or increasing funds to, an endowment	3.35	2.26

As evident, Tables 11 and 12 are pretty similar. The top three answers are the same with some differences in the next three. Marketing placed in the top five for frequency, but in importance it came in at number seven. An endowment was identified as the third most important strategy, but in terms of frequency it came in at number 15.

Comparing the average importance score to the average frequency score also led to an interesting result. Ninety seven percent of the time, the frequency score was lower than the importance score, except in one case when the scores were identical. Here is another way to look at it. Leaders rated the importance and frequency of 31 sustainability strategies. In 30 cases, the average rating for importance was higher than the average rating for frequency. In the 31st case, the average ratings were identical. Comparing the scores, also enabled me to see the biggest gaps between the importance and frequency. The results can be seen in Table 13.

Table 13

Sustainability Strategies Organized by Difference Between Importance and Frequency – Highest to Lowest

Name of strategy	Average Level of Importance	Average Level of Frequency	Difference Between Average Level of Importance and Frequency
Establishing, or increasing funds to, an endowment	3.35	2.26	1.09
Tuition initiatives such as: cutting tuition for all families; offering a free or reduced tuition for new students; establishing a lower tuition for younger grades; amortizing tuition payments over a longer time period; establishing one set tuition for the entire time the student is at the school	2.65	1.7	0.95
Cross-school collaboration such as: collective purchasing of materials with another school or schools; sharing human resources between campuses or schools; focusing on cross school collaboration - PD, marketing, recruiting	2.57	1.7	0.87
Establishing a Jewish education fund paid for by all members of the Jewish community, regardless of whether they have kids in Jewish day school	2.22	1.39	0.83
Implementing a middle income initiative such as: flat grant – a predictable grant, targeted for middle-income families, based on income; tuition reduction for additional children; or flex tuition – a predictable tuition rate based on income (less than full tuition)	2.74	1.96	0.78
Investing in teacher development to improve the quality of the teaching	3.61	3.17	0.44
Prioritizing an annual campaign and fundraising	3.74	3.39	0.35
Paying close attention to retention trends	3.35	3.09	0.26
Spending money to improve the quality of the current school program being offered	3.26	3.04	0.22
Focusing on marketing initiatives	3	2.87	0.13

The largest discrepancy between importance and frequency was establishing, or increasing, funds to an endowment. As mentioned above, it was the third highest score for importance, but only the fifteenth highest score for frequency. The next two on the list were tuition initiatives and cross school collaboration.

Interview Data for Guiding Research Question #2

During the one-on-one interviews with the heads of schools, there were a number of open-ended questions asked that directly or indirectly related to the second guiding research question: What are the various approaches to addressing sustainability reported by Jewish Day School leaders? These questions included, but were not limited to, the following:

- Which sustainability strategies have been most successful for your school? Why do you think they were successful?
- How do you evaluate or define success of the sustainability strategy? What criteria do you use in your definition of a successful strategy?

(For a complete list of interview questions, please see Appendix 4.) I wanted to know which strategies have been most successful, but also how they define success. First we will look at the self-identified most successful sustainability strategies.

Successful Sustainability Strategies. There were answers related to successful financial improvements that were employed. In some cases it was raising more money and in other cases it was about saving money. Head of school C talks about savings to budgeting and teacher negotiations:

One, we started out by really looking line-by-line and piece-by-piece at our budget and staffing and deciding what we could cut and what we couldn't and how we could do

things more effectively . . . And then one of the other things that we did really well was negotiate with our staff. We have a really strong staff, but they're underpaid in the city because they really care about the school and they took a zero percent increase for a long time . . .

Head of school E talks about fundraising, “The sustainability strategy is really fundraising to cover the gap between full-paying and non full-paying tuition.”

Often, it is not just about fundraising and it is not just about budgeting. Usually, there are a number of sustainability strategies working in conjunction. Head of school F talks about several aspects of the school’s full sustainability plan.

The school merged its operations into one campus. But I think it's part of three or four prongs of a strategy. So number one is increased fundraising. Number two would be cost management. Number three would be operating related, but would be operating to the greatest efficiencies with the greatest efficiencies . . . And the fourth would certainly be the amalgamation of the campuses and the resulting savings in doing that . . . The last one would be increased enrollment.

All of these different strategies worked in tandem to allow the school to be sustainable for the present time.

Often sustainability is very data driven. Heads of schools use data to make informed decisions on strategies that will provide the maximum success for the sustainability of the school. For example:

I would say our financial sustainability is simply based on paying close attention to maximizing classroom capacity and utilization, and making sure that we are very

thoughtful about recruitment, enrollment, and retention to ensure the highest possible capacity utilization. That's our current sustainability strategy (Head of School D, 2019).

Upon reflection, head of school F talked about the importance of fundraising, but considered the differences between successful years of fundraising and unsuccessful years of fundraising. The difference, it appears, is having a clear goal for the community to get behind. “The successful ones have been those big campaigns, like when we moved here . . . So every time we've had a goal, that has worked out . . . If we're kind of wishy-washy . . . it hasn't worked.”

As has been discussed throughout this research, Jewish day school sustainability is not just about revenue versus expenses; sustainability is also about perceived value and academic excellence. In the interviews, some of the heads of schools also talked about the work they are doing to increase the educational and programmatic value of the school through investing in and improving the overall program. In many ways it's a balance between how much tuition is charged and what the school is able to provide for that level of tuition. “I would say that our sustainability strategy, although we've never really described it that way, is exactly what you said earlier which is trying to find the right balance between trying to find the right value proposition. What's the right price point and the right programmatic level” (Head of School B, 2019). Other heads of school talked more directly about investing in the school program. “I think that just working on improving the core product of the school and, perhaps, investing in the school now, and maybe even taking a short-term financial hit, so to speak, to better the school and retain more students and attract more students, increases enrollment” (Head of School A, 2019).

Finally, head of school E talks about the challenge of convincing people on the importance of investing in the academic program as a solution to school sustainability.

So my enrollment strategy is to have really, really good education . . . I think the idea that one would focus resources on core services, and on educational excellence, seems to be a hard sell sometimes. There seems to be this idea that you should just do some special program, get people in school, or some kind of marketing thing will do it or some kind of trick of the trade. Whereas I honestly feel like the best thing to do is to put the resources into teachers and into good teaching.

After hearing about the numerous successful sustainability strategies employed by the eight different heads of school, I then wanted to learn more about their definitions or criteria for success. The next section goes into more detail on what makes for a successfully implemented sustainability strategy.

Criteria of Successful Sustainability Strategies. The heads of school that I interviewed had many examples of their most successfully employed sustainability strategies. I wanted to know more about their understanding of success so I asked the heads how they knew something was successful. What was the criteria they used to determine if a sustainability strategy was successful or not? Here are their responses.

Most heads of school gave two or three part answers. There were numerous criteria that they used to determine the success of a sustainability strategy. Within the criteria, retention and/or attrition data were usually a factor in the determination. Head of school A talks about retention and fundraising as the two success criteria.

So I think reasonable attrition is one measure of success. So are we losing kids for the

right reasons or are we losing kids for the wrong reasons and are we losing the wrong kids? So when we lose the wrong kids I think that we aren't seeing our strategy play out the way it should when we think about school improvement, high touch customer service for the purpose of retention. So that's one measure. And I think as we look at subsidy, how much money are we able to raise, and how are we able to tell that story, and really get donors to get behind that cause, I think is another way to measure it.

Heads of school B and D talk about the financial health of the school and retention. “I would just look at our balance sheet and enrollment data. I mean I think those are the simplest things” (Head of School B, 2019).

So I think there are two legitimate criteria (for determining the success of a sustainability strategy). The first is the overall financial picture of the schools. So what is the overarching financial impact of the decisions that we make? The second is whether or not we demonstrate changes in behavior from families either on entrance or on retention. So it's one thing to say we offered a tuition discount and we filled the class. It's another to actually demonstrate that there was a causality between the choice that you made that actually impacted someone's decision, which we don't do a great job of measuring (Head of School D, 2019).

Head of School D adds a very important point: proving the success of a sustainability strategy is not always an easy thing to do. On top of identifying the strategy that was implemented and the positive change to the financial health of the school or enrollment, the onus on the school is to prove a relationship between the two. It is of great benefit to the school to show that by doing X (sustainability strategy) the result was an improvement to the financial

sustainability of the school. However, since a school is a very dynamic place, there are many things happening at once and it is not always conceivable to isolate one strategy that had a positive effect on the financial sustainability of the school. Proving causality is not always possible, but developing tools to prove causality might be an important area for future research.

Head of School E makes the point that success can only occur when a school is able to maintain its desired educational philosophy and approach.

A balanced budget combined with full classes or close enough to full classes and maintaining the school's educational philosophy and approach. I mean we could balance the budget and mess up the education . . . It's great to sustain something, but you have to sustain the thing you want to sustain, not just sustain the school.

For Head of School H, success is in the achievement of the goal. “Because we achieve the goal we wanted to do. And when it has been successful, it's also been overly. So we were looking for a hundred we got one hundred and twenty. We opened a new classroom and we were able to buy new materials that we had not expected to. That's how I define it (Head of School H, 2019).

Finally, two other heads of school discussed the role that surveys play in helping to identify the success of a sustainability strategy.

So again retention and recruitment will be big parts of it, but also the people's satisfaction in terms: I'm not here because I don't have a choice, but I'm here because I've seen my child, you know, he's thriving academically, artistically, socially, emotionally. And so the overall feel of, it's not as tangible, but you can still through surveys kind of find out that the wrapper of what we give is good (Head of School G, 2019).

I think the criteria is that you look at retention in the school when you're looking at if your education is improved. You look at surveys that you've done with parents. Those are all the strategies that you use to assess whether it's working or not (Head of School C, 2019).

As can be seen from the quotations above, positive impacts to retention and financial health of the school play a huge role in determining if a sustainability strategy was successful. Others also added the ideas of successful fundraising and the achievement of fundraising goals and maintaining the desired educational product. Regardless, as one head of school pointed out, it is not always easy to prove a direct link between the strategy and desired effect on school sustainability. More research could be done to help schools prove the links between the two.

Analysis of Questionnaire and Interview Data: What are the Various Approaches to Addressing Sustainability Reported by Jewish Day School Leaders?

When asked through surveys and interviews, about the various approaches to addressing sustainability reported by Jewish day school leaders, the data clearly show that leaders are aware of a number of strategies available to them. They were able to identify the strategies that played an important role in their institutions and the frequency with which they used them.

It is important for school leaders to identify and understand the key issues surrounding sustainability before they can decide on how best to deal with them (i.e. which sustainability strategies to implement). When asked to identify the key issues affecting non-Orthodox Jewish day school sustainability, 15 of the 23 school leaders that answered the questionnaire highlighted two main issues: cost and affordability and values and commitment (of families and community). Four of the 23 also highlighted academic excellence. Based on these results, it is assumed that

school leaders will most likely try sustainability strategies related to cost and affordability, value and commitment, and academic excellence to improve the financial sustainability at their institutions, as these are the self-identified biggest issues affecting day school sustainability. The data validated this assumption.

The most commonly used sustainability strategies (based on Table 12, frequency) were fundraising, investing in teacher professional development, paying close attention to retention trends, spending money to improve the quality of the school program, marketing, and establishing an endowment. These same strategies were also identified as most important by school leaders (Table 11). All of these strategies relate to either cost and affordability, value and commitment, or academic excellence. Thus, there is a direct correlation between the main issues affecting Jewish day school sustainability and the types of sustainability strategies employed by school leaders.

Perhaps one of the most surprising results was that, in all but one case, the level of importance averaged out to a higher rating than the frequency by which the strategies were implemented, and in that one additional case the averages were identical. The relationship between importance and frequency is not clear. For example, fundraising was listed as most important. However, it is not clear as to why the frequency for fundraising was also the highest. It could be because the leaders viewed it as most important and, thus, they wanted to implement it as much as possible. However, it could also be because it is easier to implement which makes it more frequent due to simplicity. Or, it could also be the most frequent because it was the most well-known strategy to the respondents. Again, the reason for this discrepancy is not clear. Is it about not having enough time, not having enough people, or just an acceptance that leaders and

schools cannot do as much as they should to have the desired impact? This could benefit from further study as the results would tell us more about best practices.

Comparing the importance levels with frequency levels also allowed me to determine the biggest discrepancies. The largest discrepancy was endowment. Leaders rated its importance at 3.35, but rated the frequency at which they implement the strategy at 2.26 for a difference between the two of 1.09. This is a sustainability strategy that could benefit from further study as the data show that Jewish day school leaders feel that they are severely underutilizing endowments. The next two items on the list were tuition initiatives and cross-school collaboration. These strategies might also be underutilized and could potentially benefit from further study to better determine why there is such a vast discrepancy between importance and frequency of use.

Finally, heads of schools are able to identify clear criteria for determining the level of success of a sustainability strategy. These criteria are:

- Positive impacts to retention and attrition
- Positive impact to financial health of the school
- Successful fundraising
- Ability for the school to maintain its desired educational philosophy and approach
- Achievement of a predetermined goal

When measuring the impacts of sustainability strategies, it is very important that school leaders consider the above criteria. If school leaders do not currently have a way of connecting sustainability strategies to the impacts on the above criteria, then it is suggested that they develop metrics to effectively collect this important data.

Sustainability Strategies Related to Affordability Versus Value and Commitment. It is important to take a moment to discuss the intended goals of the various sustainability strategies that emerged from the literature review. Most of the sustainability strategies directly or indirectly related to the top identified issues in non-Orthodox Jewish day school education: affordability, perceived value and commitment, and program excellence. However, the majority of identified sustainability strategies related more directly to the issue of affordability and only the minority related to improving perceived value and commitment. The implications of this finding will be discussed in Chapter 5. Current examples of known sustainability strategies that directly relate to value and commitment are: marketing/advertising about the importance of Jewish day school education; investing more in the admissions department; establishing a Jewish education fund paid for by all members of the Jewish community, regardless of whether they have children enrolled in Jewish day school; and investing more in the teaching and academic program of the school with the goal of increasing the perceived value of education at Jewish day schools.

Emerging Theme: Communal Collaboration. Throughout the analysis of the questionnaire and the interviews, there appeared to be a recurring theme: the idea of trying to solve the issue of non-Orthodox Jewish day school sustainability in Toronto as a community. In this case, community refers to the schools working together, but also the greater Toronto Jewish community working together.

Communal Collaboration: Questionnaire Data. When asked who they feel is responsible for dealing with the issues of Jewish day school sustainability, non-Orthodox school

leaders identified many constituents (see Table 14).

Table 14

*Who do you feel is responsible for dealing with the issues of Jewish day school sustainability?
(Check all that apply)*

Field	Number of Respondents
Jewish community leaders	23
The United Jewish Appeal (UJA) – Jewish Federation	22
Jewish day school leaders	21
Me	19
Jewish day school parents	15
Jewish education donors such as Avi Chai and the Jim Joseph Foundation	12
North American Jewish educational institutions such as Prizmah	9
University academia	1

All survey takers identified Jewish community leaders, and the large majority also identified the UJA, Jewish day school leaders, and themselves as responsible for dealing with the issue. This points to the perception that leaders believe that many people need to be involved in Jewish day school sustainability.

Respondents also had an opportunity to write additional answers to this question. One of the respondents wrote the following answer, “Boards of all Jewish day schools”. In this answer, the respondent was tying everyone together and saying that all of the board members had to work together to solve the issue. When the survey asked about changes in leadership roles that would

allow for more time to devote to sustainability, the following two answers highlighted the need for communal collaboration. “Making it an explicit mandate. Problem is that sustainability at the individual school level is not the right focus. Needs to be a community discussion” and “Greater communal participation with other professionals.” When asked about the sustainability strategies that were most impactful towards the future of sustainability of the school, these two answers also related to the theme at hand. “More collaboration across schools on the broader community issues (e.g. Jewish day school sustainability). Less focus on self-preservation of each individual school” and “Partnerships with other schools.” The final survey questions asked if there was anything else the respondent wanted to tell me, the researcher, about non-Orthodox Jewish day school sustainability. This person had a comment that was also related to communal collaboration. “Engagement and collaboration with the progressive Jewish community across denominational boundaries would be one strategy that has not been pursued as aggressively as it could.”

The reader is also reminded that when comparing the rated level of importance of a sustainability strategy to the rated level of frequency, the third largest gap was “Cross-school collaboration such as: collective purchasing of materials with another school or schools; sharing human resources between campuses or schools; focusing on cross school collaboration - PD, marketing, recruiting”. This points to a general feeling within the community of Jewish day school leaders in Toronto that the community is underutilizing the strategy of cross-school collaboration.

Based on the survey data alone, there appears to be a desire by many to look at the issue collaboratively instead of at the level of the individual schools.

Communal Collaboration: Interview Data. The idea of discovering strategies as a community to help with Jewish day school sustainability was not limited to the questionnaire. It also came up in several of the interviews. For example, “There's been a lot of talk about, amongst the head of schools about how we can learn together” (Head of School A, 2019). Or in this dialogue between me and Head of School G.

Head of School G: I do know that being responsive to it (financial sustainability) and working collaboratively with people that you may not have even thought about. It would be very helpful.

Seth: Does the collaboration include working with Jewish day schools?

Head of School G: Yeah absolutely. Listen, and sustainability, so we're trying even to come in open and say okay you just be really honest about what's not working. Buying things centrally. Having professional development for teachers that we find it's most useful.

In the interviews, it wasn't made clear by the heads of school that trying to tackle the challenge collaboratively would solve the problem. However, many were open to the possibility. The next head of school talks about the financial savings that could also come about by having a communal entity overseeing all of the schools.

Head of School D: The other difference is that every independent school, Jewish and non, is forced to stand on its own two feet from a microcosm position. The benefit of school boards is that they can balance their strengths and weaknesses off each other, especially from a financial point of view . . .

Seth: When you talked about school boards and stuff like that, would we be better served

to have a school board (for the non-Orthodox Jewish day schools of Toronto)?

Head of school D: I'm just saying that if there were an overarching entity that oversaw the collection of Jewish education in a certain area, and ensured that it wasn't duplicative, then it's possible that we would be better served.

However, Head of School D then went on to warn of a potential pitfall of working together. "But if you know anything about the tragedy of the commons, Garrett Harding, which is that the minute everyone is forced to share a collective, someone realizes that if I step outside just a tiny little bit, I'm differentiated and I'm going to get a bigger piece of the pie". Working together only works if everyone buys into the communal model. Once one person or group leaves the model, it all falls apart. Certainly this is a topic that is worth further study.

This study led to three important findings related to the second guiding research question, What are the Various Approaches to Addressing Sustainability Reported by Jewish Day School Leaders?

Finding #3. In practice, school leaders do not use the sustainability strategies they are aware of to the degree necessary. This finding is substantiated based on comparing question 11a and 11b in the survey. Question 11a asked about the level of importance of 31 different sustainability strategies. Question 11b asked about the frequency that schools make use of these 31 strategies. Of the 31 strategies, in 30 cases, the average rated level of importance was higher than the average rated level of frequency. In the 31st case, the average ratings were the same. If the frequency is lower than the importance, then this leads to the conclusion that school leaders do not believe that they are using sustainability strategies to the degree necessary.

Of all of the sustainability strategies, **Jewish leaders identified creating or investment in an endowment as the most underutilized strategy.** Non-Orthodox Jewish day school leaders rated creating or investing in an endowment as the third most important sustainability strategy with an average rating of 3.35 on a 4 point scale. However, these same leaders rated the frequency by which they use it as the 15th most frequent strategy with an average rating of 2.26. The difference of 1.06 between the importance and the frequency was the highest difference of any sustainability strategy in the survey. This leads the study to a conclusion that the endowment is the most underutilized sustainability strategy of the 31 identified strategies, and leaders do not use this strategy at a frequency that matches the level of importance they place upon it.

Finding #4. Non-Orthodox Jewish day school leaders have not used a collaborative approach between the schools to address the problem of sustainability. Within the surveys and the interviews there was little data suggesting that the schools are currently working together to solve the financial sustainability crisis within the non-Orthodox Jewish day school community of Toronto. However, they are open to the idea as some of the interviewees discussed this possibility and many of the answers throughout the survey suggested that leaders believe this is a problem that must be solved collaboratively. As was stated by one of the survey takers when asked about changes in leadership roles that would allow for more time to devote to sustainability, “Making it an explicit mandate. Problem is that sustainability at the individual school level is not the right focus. Needs to be a community discussion.” The idea and desire of solving the issue through collaboration is there, but the actualization of this idea has yet to be achieved. Collaboration with non-Jewish private schools could also be considered as the

literature points to similar issues of financial sustainability and affordability also occurring in the private school sector.

Finding #5. Leaders use specific criteria of success to determine the impact of sustainability strategies to the financial sustainability of their institutions. These criteria are positive impacts to retention and attrition, positive impact to the financial health of the school, successful fundraising, ability for the school to maintain its desired educational philosophy and approach, and achievement of a predetermined goal. School leaders are encouraged to collect data and to develop metrics that enable them to compare impacts of sustainability strategies to the criteria above.

Data Collected for Guiding Research Question #3: What do leaders of Jewish day schools believe to be the factors and conditions that increase and inhibit their capacity to focus on school sustainability?

The third guiding research question to be answered in this study was, what do leaders of Jewish day schools believe to be the factors and conditions that increase and inhibit their capacity to focus on school sustainability? The following section will present the relevant collected data related to this question from both the questionnaire and the one-on-one interviews.

Questionnaire Data for Guiding Research Question #3

In the questionnaire, there were several questions related to this guiding research question. The complete questionnaire can be seen in Appendix 3. First, here are the results for question number 7 in the questionnaire, which asked respondents to list as many priorities for Jewish day school leaders as they could think of (other than financial sustainability). There was

no list in front of them. They had to generate their own answers based on experience. Through a process of categorizing the answers, the results of the top three answers can be seen in Table 15.

Table 15

Additional Priorities for Jewish Day School Leaders

Name of Additional Priority for Jewish Day School Lay and Professional Leaders	Number of Respondents Who Mentioned it as an Additional Priority (Out of 23).
Education and Program Excellence	18
Community Relationships	7
Parent Relationships	4

In addition to financial sustainability, Jewish day school leaders also prioritize education and program excellence, relationships with the community, and relationships with parents. Education and program excellence is clearly very important as 78%, or 18, of the 23 respondents listed it as another priority in addition to financial sustainability. Community relationships and parent relationships are noteworthy because they were mentioned multiple times, but not as frequently as education and program excellence.

Question 8 in the questionnaire sought to identify factors interfering with school leader's ability to spend more time focusing on sustainability. It asked the following, to what extent are each of the following factors and conditions impacting your ability to focus on sustainability? The possible answers were High Extent, Medium High Extent, Medium Low Extent, None at All. The results can be seen in Table 16.

Table 16

To what extent are each of the following factors and conditions impacting your ability to focus on sustainability?

Field	High Extent	Medium-High Extent	Medium-Low Extent	None at all
Finances of the school	9	6	7	1
Time	10	8	4	1
Governance	4	6	11	2
School enrollment	8	10	3	2
Competition with other schools	4	8	10	1
The academic program of the school	4	7	8	4
Personal education and understanding of the topic	2	9	6	6
Day to day issues at school	6	6	6	5
Your personal life	2	2	9	10

Through averaging the scores, here is the list of factors and conditions impacting school leaders' ability to focus on sustainability. They are listed from greatest impact to least impact:

- 1) Time
- 2) School Enrollment

- 3) Finances of the School
- 4) Competition with Other Schools
- 5) Day to Day Issues at School
- 6) Governance
- 7) The Academic Program of the School
- 8) Personal Education and Understanding of the Topic (of Sustainability)
- 9) Your Personal Life

Eighteen of the 23 respondents listed time as a high or medium high extent to impacting their ability to focus on sustainability (10 high and 8 medium high). School enrollment also had 18, but came in second place because there were only 8 high and 10 medium high. The finances of the school also play a significant role in impacting a leader's ability to focus on sustainability.

The final question in the questionnaire that dealt with this guiding research question was question number 9: what changes to your role would allow you to devote more time to sustainability issues? This included examining the other side of the question, namely what factors increase a leader's ability to think about Jewish day school sustainability. It was an open-ended question. Only 15 of the 23 respondents answered the question. The responses were quite varied and dependent upon the leadership role at school (head of school, administrator, or board member). The answers were organized through a process of categorization. Three respondents said a change in board structure, and two respondents said more community collaboration would allow them to devote more time to sustainability. There did not appear to be any other common answers making the results of this question inconclusive.

Interview Data for Guiding Research Question #3

During the individual interviews with the heads of schools, there was one open-ended question asked that directly or indirectly related to the third guiding research question: What do leaders of Jewish day schools believe to be the factors and conditions that increase and inhibit their capacity to focus on school sustainability? (The complete list of interview questions can be seen in Appendix 4.) This question was:

- If you had more time in your day, or more money in the school's bank account, what else would you do towards the goal of sustainability?

The assumption in this question was that money and time are two main issues when looking at impacts to sustainability. Very few spoke of wanting more time in the day. In fact, the three that spoke of what they would do with more time also talked about what they would do with the additional money.

These next two heads of school would use the time to find more donors to bring more money to the school. However, they would use the money differently. Head of School H would try to buy a building and Head of School B would try to lower the cost of tuition. School B owns their building so that is not a concern.

Head of School H - Look for major donors. Look for endowment. Most definitely.

Seth - More than buying your own building?

Head of School H - And buying our own building. Yes. Thank you. I was thinking about that too. But again, if we have the goal of buying a building, we might get the donors and the endowment because that has worked for us. But we do need it. Absolutely we do need both.

Look at anything we can do to reduce the cost of the education to make it more available

to middle class families would be great. So. That could take a million different forms, but they're all based on this extra money that you just put in my bank account. If I had more time in my day I could spend more time, I guess fundraising, solicit more donors, reach out to more people (Head of School B, 2019).

Head of School F, quoted below, also talked about how to use the extra time and combined it with what to do with extra money which was different from the previous answers. The time would be used to meet with more people and the money would be used on building enhancements and to improve the program and level of teaching.

I'd probably like to be out there more, promoting the school, promoting what we do, that's teaching myself. It has more time with the students being really ear to the ground as to what's going on in the school, what they feel, what they want, what they're talking about. . . . Certainly there are enhancements in the building that could be done. I think there's always programming that can be done. Always professional development for staff that can be done, wanting to bring in the best and the brightest and the absolute best experiences for them. I'll spend the money. No problem (Head of School F, 2019).

To repeat, it is interesting to note that this head of school has a different focus as the money would be used on building enhancements and professional development for the staff, instead of lowering tuition or buying a building.

The remaining heads of school talked about how they would spend money to improve financial sustainability at their schools. They made no mention of what to do with additional time. Here are a few examples. "So first I'd build a daycare tomorrow. And another nursery class because that's just so good for the school" (Head of School C, 2019). "I would experiment a little

bit more with what we can offer in terms of tracks for public school students” (Head of School G, 2019). Head of School D, quoted below, began with explaining what not to do, and then explained how extra funds could be used towards financial sustainability.

I'll tell you what I wouldn't do. What I wouldn't do is cut the cost. So if you have money to play with you make the product better so that more people choose to opt in so that you have more money to then keep the costs low. So what does that mean? I would absolutely always increase the teacher to student ratio. I would always add teachers and specialists to the special education department so that more students were serviced more personally . . . That's what the most expensive schools offer. They don't say that's what they offer. But in reality when you pay thirty five thousand dollars a head you get more teachers. So you get smaller classes, and then you get extra specialists who help even the kids within the smaller classes receive more personalized attention. It's that simple. It all comes down to them (Head of School D, 2019).

Analysis of Data: What do leaders of Jewish day schools believe to be the factors and conditions that increase and inhibit their capacity to focus on school sustainability?

When asked through surveys and interviews, about the factors and conditions that increase and inhibit their capacity to focus on school sustainability, the survey revealed that time and enrollment concerns were the biggest factors preventing leaders from focusing on school sustainability. The academic program as well as community and parent relations were also noted in the survey. Interviews documented that leaders saw that factors and conditions that increase and inhibit their capacity to focus on school sustainability as key to address, a responsibility

within their role, something discussed frequently, and the need to be solved by multiple constituents

The two biggest factors preventing school leaders from focusing on financial sustainability were time and school enrollment. The survey and interviews identified education and program excellence, community relationships and parent relationships as additional priorities they focus on (See Table 15) that appear to compete for the time they could otherwise devote towards sustainability. It could be argued that all of these topics, whether directly or indirectly, also relate to school sustainability so it may not be helpful to conceive of them as additional priorities. They may just be part of the complex topic of financial sustainability. Financial sustainability is interwoven into many different aspects of the job for school leaders and plays a role in much of what leaders do.

When evaluating potential solutions to the issue, it will be important to consider how to find more time for leaders to focus on sustainability as well as how to make the concerns of school enrollment be less of a challenge. However, the reader should remember that, as discussed earlier in this chapter, if a school leader has more time, they may not use that time to focus on financial sustainability due to the many other responsibilities they have. This will be discussed in the next chapter.

It is interesting to note that the academic program was listed by most respondents as an additional priority for school leaders (Table 15). However, it was only the 7th largest factor to influence a leader's ability to focus on sustainability (Table 16). If it is such an important aspect of the job, would it have a greater impact on taking a leader's time away from working on sustainability? It is also noteworthy that personal life does not appear to negatively influence the

majority of school leaders in their ability to focus on sustainability (Table 16). It was far below the other factors with 19 respondents listing it as a medium low extent or none at all. This suggests that when looking for more time in the day, leaders are not trying to fill that time to help with work-life balance. Would more time be used to focus more on sustainability and other issues important to the role of Jewish day school leadership?

The interviews brought out a real diversity in thinking when asked to think about how to use more time or more money. Almost each head of school had a different thought on what to do with extra money or extra time suggesting that each school has a unique context that the head of school must consider when deciding on which sustainability strategies to implement. This study sought to understand the views school leaders had on financial sustainability. If each school has a different set of practices related to financial sustainability is also possible that there are best practices, regardless of the context and needs of the school, that would require further research.

This study led to two important findings related to the third guiding research question, what do leaders of Jewish day schools believe to be the factors and conditions that increase and inhibit their capacity to focus on school sustainability?

Finding #6. Lack of overall available time, most notably specific efforts on maintaining or increasing enrollment, is the biggest factor in preventing non-Orthodox Jewish school leaders from focusing more on sustainability efforts. This finding is substantiated by the data from question 8 in the questionnaire. Respondents were asked to identify what was getting in the way of focusing more on sustainability efforts at their schools. The leading factors were a lack of time and efforts to maintain or increase enrollment. If the school leaders were able to find more time or were able to spend less effort on enrollment then

they would have more time to think about and act upon financial sustainability. Other factors competing with the leaders' ability to focus on financial sustainability included the finances of the school and competition with other schools, but these were not rated as high as the impacts of time and maintaining or increasing student enrollment. However, earlier in this chapter, it was shown that school leaders have many important issues they deal with, not just financial sustainability. Thus, even if they had more time, or didn't have to focus on enrollment, it is not definite that they would use this extra time to focus solely on financial sustainability. There are many other important issues that also demand more attention.

Finding 7. The sustainability practices of non-Orthodox Jewish schools are contingent on the manner in which leaders choose to spend their time and other resources-- there is individual nuance to each school and each school leader. Question 7 in the questionnaire showed that the role of school leader is very complex, with many competing factors vying for the leader's time, not just financial sustainability. Therefore, they have to make many decisions as to how they can best devote time to the different issues they are responsible for. Question 9 in the questionnaire asked what changes to their respective roles would allow non-Orthodox day school leaders to spend more time on financial sustainability. There was great variation in the answers. When the heads of schools were asked what they would do with more time and more money, they all had different answers that were based on the contexts in which their schools were functioning. The answers included spending more time fundraising, more time talking with students, using the money to make facility upgrades, experimenting with programs to allow later entry for public school students, buying a school building instead of renting one, starting a daycare, hiring more teachers, and opening a middle school. The questionnaire and

interviews showed that there were many similarities in how they devote their time to sustainability efforts. All of the schools fundraise. All of the schools invest money in professional development for teachers. All of the schools have funds for low and middle-income families. However, based on interview data, it is all at the discretion of the school leaders as they have the final say as to which sustainability strategies will be implemented and how often they will be employed. It could be helpful to devote further studies to determine how much personal preference should play in a school's chosen sustainability strategies versus universal best practices that may exist.

The question must then be asked as to why school leaders choose the sustainability strategies that they choose and why do they implement some themselves and delegate some to others. This can be answered through the criteria that they use to determine the success of a sustainability strategy. School leaders referenced the following criteria when asked in the one-on-one interviews: looking at the balance sheet and enrollment data, achieving fundraising goals, a balanced budget combined with full classes operating according to the school's philosophy and approach, impacts on parent surveys, and demonstrable changes in behaviour from families either on entrance or on retention. When leaders, specifically heads of schools, weigh these criteria with the strategies that were used, they then decide what to continue, what to discontinue and what to delegate. Further research could also be helpful in helping school leaders to determine if there are better criteria to utilize when thinking about the implementation of sustainability strategies.

Summary of Chapter

In this chapter, the reader was presented with the data from the study as they related to the guiding research questions. As a review, the study came up with the following findings.

Finding 1

Financial stability is one of the most important issues for school leaders in Jewish day school education, but time spent on sustainability efforts does not mirror the level of importance due to their many other responsibilities.

Finding 2

The majority of non-Orthodox Jewish school leaders do not believe that they have achieved long-term financial sustainability, or will be able to do so in the near future.

Finding 3

Known financial sustainability strategies are not being used to the degree desired by school leaders. The endowment strategy was identified by school leaders as the largest gap between desired degree of use and actual frequency of use.

Finding 4

A collaborative approach between schools to address the problem of financial sustainability is not used.

Finding 5

School leaders identify specific criteria that are used to assess the impact of financial sustainability strategies. These criteria are positive impacts to retention and attrition, positive impact to the financial health of the school, successful fundraising, ability for the school to maintain its desired educational philosophy and approach, and achievement of a predetermined goal.

Finding 6

Lack of overall available time, most notably specific efforts on maintaining or increasing enrollment, prevent leaders from focusing more on financial sustainability efforts.

Finding 7

The use of financial sustainability practices are contingent on the manner in which leaders choose to spend their time and other resources.

The next chapter examines the findings of the study and delves into greater detail regarding the implications for the field and it discusses future studies that could take place.

CHAPTER 5: SUMMARY, DISCUSSION, FUTURE RESEARCH AND FINAL REFLECTIONS

Chapter Five is presented in four sections. The first section provides an overview of the research study and a summary of the preceding four chapters. The second section discusses the findings related to each of the three guiding research questions and also describes the implications of the findings for Jewish school leaders and teachers. The third section provides recommendations for future study. The final section of this chapter is a personal reflection regarding the impact this study has had on me as a leader and also includes a call for action.

Summary of Chapters 1-4

Chapter 1 stated the problem that the long-term financial sustainability of non-Orthodox (or liberal) Jewish day school education in North America is at risk. The chapter then continued with the purpose of the study and the three questions that guided the study. The guiding research questions were:

- To what degree do Jewish Day school leaders believe addressing sustainability to be a leadership priority?
- What are the various approaches to addressing sustainability reported by Jewish Day School leaders?
- What do leaders of Jewish day schools believe to be the factors and conditions that increase and inhibit their capacity to focus on school sustainability?

Chapter 2 examined bodies of literature that helped address the guiding questions and were grouped accordingly using the following titles: an interdisciplinary look at sustainability,

the history of Jewish education in North America, challenges to non-Orthodox Jewish day school sustainability, potential solutions, and leadership and Jewish education in the 21st century.

Chapter 3 discussed the methods and tools used to conduct the study, the structure of the questionnaire and interviews and how the data were collected and analyzed. The research was a multiple-case holistic design case study of the eight non-Orthodox Jewish day schools in Toronto. The questionnaire was answered by heads of schools, board members and administrators in these eight schools. One-on-one interviews were conducted with the heads of all eight schools.

Chapter 4 analyzed the data and presented the findings of the research study based on the three guiding research questions.

Discussion of the Findings for Guiding Research Question #1: To what degree do Jewish Day school leaders believe addressing sustainability to be a leadership priority?

In this section, Finding 1, “Financial stability is one of the most important issues in Jewish day school education, but non-Orthodox Jewish day school leaders are unable to focus on sustainability to the degree necessary to match the level of importance due to their many other responsibilities,” and Finding 4, “A collaborative approach between the schools to address the problem of sustainability is not used,” and their implications regarding Guiding Research Question #1, are discussed.

Leadership Priority. The data for the first finding of the study showed that financial sustainability is, indeed, a Jewish day school leadership priority. This was not surprising. The review of the literature showed that many educational and communal leaders have identified financial sustainability as one of the main issues Jewish day school education is grappling with at

the present time (Task Force on Jewish Day Schools, 1999; Cohen, February 2013; Held, 2014; Malkus, 2016; Kelman, 2017; Rosov, 2017). The results of the questionnaire and the interviews simply corroborated what was already determined from the literature. Every leader who answered the questionnaire had a role in thinking about and acting upon the financial sustainability of their schools. Every head of school interviewed was well versed on the topic of financial sustainability, and they all had well thought out statements on how financial sustainability was affecting their institutions and what they were trying to do about it. Additionally, they all agreed that the two biggest factors in financial sustainability are 1) affordability and cost and 2) value and commitment.

Despite considerable efforts toward and knowledge of the subject, the Jewish day school community has not yet solved the issue of financial sustainability. In many communities, the cost of running a day school continues to rise and the number of students in the schools continues to decline. The issue has been in the news for many years and remains in the news today as one of the major concerns in non-Orthodox Jewish day school education. This is also true in Toronto. In 2009-2010 there were 5954 students enrolled in the non-Orthodox Jewish day schools of Toronto. Today there are 4656 (UJA data). The necessity for Jewish day school financial sustainability to be a leadership priority remains paramount.

While the leaders were able to identify the two main issues of financial sustainability, affordability and perceived value, their actions do not match their understanding of the problem. The literature review showed that most of the sustainability strategies implemented by schools relate to the issue of affordability and cost. Not as many strategies have been developed to increase the perceived value and commitment of non-Orthodox Jewish day school education.

Value plays an important role in spending patterns. “A study carried out by the University of Western Australia has highlighted the important role values play in our daily behaviour, including where we invest our time and money” (University of Western Australia, 2019). If the price is higher than the value, then there is a good chance that the consumer will not spend the money. “There are different factors affecting price sensitivity. One of the important factors is the value perceived by consumers” (Ceylana, Koseb, and Aydin, 2014, pg 2).

Since the majority of non-Orthodox Jewish families are not enrolling their children in Jewish day school (Pew Research Center’s Religion and Public Life Project, 2013; Schick, 2014), then one could make the assumption that the perceived value is less than the cost. If the community is able to raise the perceived value of Jewish education, will non-Orthodox Jewish families who can afford the tuition choose to enroll their children in Jewish day school? Some researchers suggest this as a strategy (Litman, 2009; Malkus, 2016), however, there is not enough research that looks into how the Jewish communities of North America, and Toronto specifically, can raise the perceived value of Jewish education for non-Orthodox Jewish families currently not sending their children, or thinking about sending their children, to Jewish day school.

Communal Collaboration. While it was not surprising that school leaders viewed financial sustainability as a major issue, not all of the school leaders mentioned the desire to address the challenge together. Many schools are in direct competition with one another for the same pool of families. They may be less inclined to work with one another if they feel collaboration will provide an advantage to another school. One head of school told me that there is very little sharing of tuition and enrollment data between the schools because of the

competition. Finding 4 in the study showed that some of the leaders are open to solving the issue collaboratively, but certainly not the majority. However, there were a number of comments in the questionnaire that showed that many leaders view collaboration as a positive approach and that it should not be discounted. This is not a new idea. Kahn suggests trying to solve the issue of Jewish day school sustainability with a regional perspective, “Communities with a defined number of schools can start with a regional perspective, bringing together local funders to build the future of our joint communities” (2018). She encourages the readers of her article to look beyond the ‘my school’ approach to a regional view in order to facilitate a more meaningful difference in Jewish day school sustainability.

Collaborations among leaders in the Toronto non-Orthodox Jewish day school community include a group called Grassroots for Affordable Jewish Education whose mission is “To make Jewish day schools affordable for every family in the Greater Toronto Area”. Additionally, the heads of schools of all of the Jewish day schools in Toronto, Orthodox and non-Orthodox, meet once a month to discuss a variety of issues, including financial sustainability. Head of School A had this to say about learning together as a leadership community:

There's been a lot of talk, amongst the head of schools about how we can learn together, and the executive director of the United Jewish Appeal's Toronto Centre for Jewish Education is trying to do some work with us on how we can learn together. And we've talked a lot about, you know, if we're going to learn together and if the United Jewish Appeal's Toronto Centre for Jewish Education is going to help to fund that, and we're to go on this learning trip together (Head of School A, 2019).

The school leaders have a lot to teach each other and a lot to learn from one other. While there is some collaborative work that is already happening, there is still so much more that can be done.

Notwithstanding that the schools are in competition with one another, it is still surprising that the heads of school do not all see collaboration as mutually beneficial for the entire field. As financial sustainability continues to become more problematic for the non-Orthodox Jewish day school world, it is clear that the previous strategies are not working. We need an opportunity to develop new strategies; this can be better achieved by working collaboratively. The potential benefits of collaborative learning are expanded upon throughout the literature: on the university level (Adams and Slater, 2002), (Johnson, Johnson, and Smith, 1998), through its positive impact to critical thinking (Gokhale, 1995), and on collaborative learning in general “Our meta-analysis examining over 600 research studies dating back to the 1800’s and covering all age groups and subject matter found that students working together cooperatively learned much more” (Johnson and Johnson, 1986). There is a prolific amount of research that shows the benefits of collaborative learning. Since this study revealed that that school leaders are not working collaboratively on school sustainability, can this model of collaborative learning be applied to the issue of financial sustainability that is currently without a clear solution?

In his book, *Leadership Without Easy Answers*, Ronald Heifetz discusses the difference between technical and adaptive problems. Some “problems are *technical* in the sense that we know already how to respond to them” (1994, Pg. 71). Solutions for technical problems already exist. The issue can be identified and there is a known solution to solve the problem. Other problems are adaptive problems “that demand innovation and learning” (Pg. 8). There do not yet

exist clear solutions to adaptive problems. More innovation and learning must occur in order to determine a solution to this new problem.

Some of the solutions to the Jewish day school financial sustainability crisis that have been tried up to this point have been technical solutions. However, Jewish day school financial sustainability is not a technical problem, rather, it is an adaptive problem that, currently, does not have a clear and easy solution. In order to solve the issue, new ideas and new solutions are needed. Research suggests that this is best done when working collaboratively, not in separate silos. The issue of Jewish day school financial sustainability is too widespread, interconnected, complex, and pressing to try to solve it alone. Jewish day school leaders would benefit from creating a learning organization as described by Peter Senge in his book, *The Fifth Discipline: The Art and Practice of a Learning Organization*. Learning organizations are places “where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective assumption is set free, and where people are continually learning how to learn together” (2006, pg. 1). The problem of Jewish day school financial sustainability is an adaptive problem that has no clear solution. It will take new learning and new ideas to solve the issue, and the best way to do that is through creating a collaborative learning organization in which the community works together to find new solutions.

Competing Demands. Financial sustainability is very important for non-Orthodox Jewish day school leaders, but they have many other concerns as well that they must focus on, particularly maintaining academic excellence. They are unable to solely focus on financial sustainability due to the many other responsibilities they have to juggle. The complexity of the

role of school leaders today is not a new notion. There is an immense body of literature that discusses the increasing training needs and responsibilities for 21st century school leaders. This includes more specific training before beginning the job of school leader (Ng and Szetzo, 2016), identification of the many leadership responsibilities for 21st century school leaders (Marzano, Waters, and McNulty, 2005), and engaging in personal continuous professional development while also providing continuous professional development for staff (Nooruddin and Bhamani, 2019). There is new learning that needs to occur for school leaders today in order to more effectively manage the many competing demands they must contend with.

Because school leaders today have so many more responsibilities, they need help to learn how to be more effective multi-taskers. The ideal people to help them are other school leaders in the same role. This is another argument for collaborative problem solving. If school leaders work together to solve financial sustainability, they may also begin to learn from one another as to how to more effectively meet all of the demands of their complex leadership roles.

The lack of time was one of the largest factors identified in preventing day school leaders from focusing solely on financial sustainability. They have many other responsibilities, and it is challenging to attend to all of them when there are only 24 hours in a day. In addition to ensuring the financial sustainability of the school, school leaders (especially heads of school) must invest considerable time in the academic program, working with the board, working with parents, working with teachers, resolving complicated student issues as they arise, community relations, and more. If given more time, school leaders said that they may use that time to work on other important issues such as the academic program or meeting with students, as opposed to financial

sustainability. This study demonstrates that more time will not necessarily result in school leaders spending that time on the financial sustainability of their schools.

What are the implications of this finding for non-Orthodox Jewish day school leaders? They need to acknowledge that their role is complex and layered. Financial sustainability is just as important as academic excellence which is just as important as retention trends. This study suggests that school leaders see these factors as interdependent, but do not address them using a systems thinking approach. Taking on a systems lens allows the leader to work in a complex system in which everything is related, where his/her role integrates many elements at once rather than envision the leadership role as one that deals with each element individually or linearly. A focus on systems thinking means “Looking at the widest possible understanding of a system to consider ways things influence each other over long periods of time and at great distance; move from breaking things down into their smaller, manageable parts to see the systems and patterns” (Shevitz, 2011, pg. 844). Instead of isolating smaller and smaller parts of the system being studied, systems thinking works by expanding its view to take into account larger and larger numbers of interactions as an issue is being studied” (Aronson, 1996, pg. 1). For day school leaders this means looking at all of the factors that influence financial sustainability and trying to conceive of it as a system. “Overarching attention to the system as a whole is necessary to create and maintain substantial change” (Kushnir, 2006). There is substantial change needed in the financial sustainability of Jewish day schools, and Kushnir argues that systems thinking is needed to create and maintain a substantial change.

Systems thinking takes time and tremendous support. It’s not something to be done on one’s own and it provides another argument towards trying to solve the challenges of non-

Orthodox Jewish day school financial sustainability in a collaborative manner. Some researchers have already begun the research on the impact of systems thinking on Jewish day schools in the context of school change (Kushnir, 2006) and staff development (Blumberg, 1998). Research should also be done into the role systems thinking can place in financial sustainability strategizing and implementation. By working together, school leaders can support one another as they try to view their roles from a systems-thinking perspective

Achievement of Long-Term Financial Sustainability

Finding #2, the majority of school leaders do not believe they have achieved long-term financial sustainability, provides another finding related to the first guiding research question. This was also not a surprising finding. There is a great deal of literature on the topic that discusses ways to tackle the issue of financial sustainability. No one is writing about how they have achieved the goal of long-term financial sustainability. The literature shows that non-Orthodox Jewish day schools are seeing unprecedented challenges in enrollment (Rosov, 2017), costs of education (Eis, 2018), and perceived value in Jewish day school education (Malkus, 2016). These challenges make long-term financial sustainability a very difficult goal to achieve.

There are too many constantly evolving factors and conditions making long-term financial sustainability an unrealistic expectation. The starting point for leaders should be an acknowledgement that these variables are constantly changing and that short-term financial sustainability may be a more realistic goal. Knowing this, leaders must then decide on sustainability strategies that are the most resistant to change, or ones that best serve the school in a constantly changing marketplace. At the same time, long-term financial sustainability is an important goal and must stay on the minds of Jewish day school leaders. As stated by the

National Association of Independent Schools (NAIS), “Ensuring financial sustainability is a key component to long-term success” (NAIS, 2019).

Perhaps what was most surprising in this study was that two of the heads felt that they had achieved long-term financial sustainability. Here is what one of the heads said:

I think we have (achieved long-term financial sustainability). In so far as we have a core of donors who are committed to the school. I think we've got enrollment levels at the point where operations are pretty sustainable on an ongoing basis. We don't have significant year over year deficits or anything like that (Head of School E, 2019).

For this head the indicators of long-term financial sustainability include core donors, high enrollment levels, and no significant deficits.

The other head who felt his/her school had achieved financial sustainability added the caveat, if long term was defined as the next five years. This school has a five year plan that is sustainable. Here is how they got there.

It's part of three or four prongs of a strategy. Number one is increased fundraising.

Number two would be cost management. Number three would be operating related, but would be operating to the greatest efficiencies with the greatest efficiencies . . . And the fourth would certainly be the amalgamation of the campuses and the resulting savings in doing that. The last one would be increased enrollment (Head of School F, 2019).

Head of school F uses the indicators of fundraising, cost management, operating efficiencies, and increased enrollment to lead to the conclusion of long-term financial sustainability.

Heads E and F both list enrollment and fundraising as contributing to sustainability. More research could be done on these schools to glean further ideas towards helping other schools achieve this important goal of long-term financial sustainability.

Discussion of the Findings for Guiding Research Question #2: What are the various approaches to addressing sustainability reported by Jewish Day School leaders?

In this section, Finding 3 and 5 in the study and their implications regarding Guiding Research Question #2 are discussed.

Importance and Frequency

Finding 3 states that school leaders do not use the sustainability strategies they are aware of to the degree necessary. Of the 31 sustainability strategies presented in question 11 in the questionnaire, in 30 cases, the rated frequency that a sustainability strategy was used was always less than the rated importance. In the 31st case, the rated frequency and importance were the same. For example, the average frequency rating for the fundraising strategy was 3.39 which was less than the average level of importance rated by leaders at 3.74. There was not a single case in which the average frequency of use was rated higher than the importance. To put it another way, leaders do not think they are employing sustainability strategies with enough frequency to match how important these strategies are. Other studies have also compared importance with frequency with the frequency numbers consistently being lower than the importance numbers (Safdari, 2018; Myers et al., 2018). As a further step, Safdari computed the Spearman Rank Order Coefficient of Correlation to determine if the frequency and importance levels in the study were in harmony, meaning was the perception of frequency in congruence with the perception of importance. As a future step, my own study could benefit from determining the congruence

between frequency and importance numbers to help understand the consistency of lower frequency numbers in the data.

Without further research, it is hard to know why these are the results. It could be that leaders think they should be employing the strategies with greater frequency and that they are not doing enough. For example, I employed Strategy A three times this year, but I should really be employing it four times a year. However, it could also be true that school leaders think the desired frequency is such a high number that it would never be feasible to reach that number. For example, I employed Strategy A three times this year, but ideally I would be employing 300 times a year to have the kind of impact I think it should have. This is a much harder fix as it would necessitate increasing the frequency at such a rate that it becomes an unrealistic goal.

Another possible reason to explain the discrepancy is lack of knowledge. Because a Jewish day school is such a dynamic institution, many people are needed to properly implement each sustainability strategy. It could be that the people taking the survey did not have all of the information and that the strategy is being employed with greater frequency than they realized. In such a case, the only change needed would be to work on transmission of knowledge between the different stakeholders in the school.

In each scenario, the results are the same. The rated level of importance was always higher than the rated level of frequency. However, the reason for the result is very important to determine as each different reason leads to a different method. It is important to figure out the answers as it will help leaders to prioritize where to focus their energies. More needs to be explored in order to determine why this was the case as leaders may be saying that there is room to implement strategies with greater frequency.

Value and Commitment Versus Cost

Finding #3 also revealed that something was askew in the types of sustainability strategies that are currently being used by Jewish day schools when relating them to the top issues the schools are dealing with. Leaders of non-Orthodox Jewish day schools identified value and commitment, cost, and academic excellence as the most significant areas of concern for non-Orthodox Jewish education today. Of the 31 known sustainability strategies listed in question 11 in the questionnaire, only 5 or 6 directly or indirectly relate to the idea of improving the perceived value of Jewish day school education including - marketing/advertising about the importance of Jewish day school education; investing more in the admissions department; establishing a Jewish education fund paid for by all members of the Jewish community, regardless of whether they have kids in Jewish day school; and investing more in the teaching and academic program of the school with the goal of increasing the perceived value of education at Jewish day schools. The majority of the sustainability strategies relate to making schools more efficient and profitable or reducing the costs for families to attend the schools, i.e. the problem of affordability.

There is research-based evidence that leaders should implement an approach that focuses on affordability. Studies show that focusing on reducing cost is more effective than raising the perceived value. For example, “consumers are generally more sensitive to lower-price promotions than to higher-quality promotions as they form their perceptions of retailer reputation” (Yoon et al., 2014, pg. 2088). However, as seen in this study on low-cost fitness centres, perceived value is still based on perceived quality and client satisfaction (García-

Fernández et al., 2018). If tuition prices are lowered at day schools, but as a result, families perceive a lesser quality of educational services, then schools are still at risk of losing families.

The primary focus on affordability is not working as we still find ourselves facing a crisis. The question must be asked with more regularity, How can communities convince non-Orthodox families that the value of Jewish day school education is worth the price? A stronger focus on increasing the perceived value and commitment has not been tried and is worth considering with greater efforts.

Placing emphasis on value and commitment separates non-Orthodox Jewish day school sustainability issues from Orthodox Jewish day school sustainability issues. In the Orthodox world, the vast majority of families prioritize the value of Jewish day school education. According to a recent Pew research study, 59% of Jews in the United States identified with a non-Orthodox Jewish movement. However, based on a study of Jewish day schools in the United States, the population of non-Orthodox Jewish day schools was only 13% of all day school enrollment (Schick, 2014, pg. 2). In contrast, the Orthodox day school population is close to 81% of all students in Jewish day schools, even though the Orthodox only make up around 10% of the Jewish population. When compared to the Orthodox Jewish community, non-Orthodox Jewish families are sending a much smaller percentage of their children to Jewish day schools.

The financial sustainability challenge in the Orthodox Jewish day school world is to enable all families to afford the high costs of Jewish day school education. In the non-Orthodox Jewish day school world, school leaders have to grapple with high costs, but they also have to contend with the issue of value and commitment. Since non-Orthodox Jewish families are not choosing Jewish day schools at the same frequency of Orthodox Jewish Families, it may benefit

non-Orthodox Jewish day school leaders to address the issue of values more directly to non-Orthodox Jewish families. Does the number of families that can afford the cost of tuition (with or without financial assistance), understand the relevance and value of Jewish education enough to send their children to a Jewish day school?

Based on the list of known sustainability strategies discovered during the literature review, I would argue that much more work can be done to help non-Orthodox Jewish families see the value in Jewish day school education. Very few of the strategies focus on improving the perceived value of Jewish day school education. This can come in the form of marketing, direct and indirect conversations with families, presentation of research that shows the long-term value of Jewish day school education, and many other sustainability strategies that have yet to even be developed. Some studies suggest that “people tend to be influenced by friends and family, sometimes more than by experts, and follow social norms” (Jayoung, 2018, pg. 4), and may point towards a need to increase perceived value through current Jewish day school parents, rather than through expert studies. Additional studies argue that tuition price could be based on perceived value which includes academic aspects such as staff and programs, as well as non-academic aspects including student service support, location, size and facilities (Amir et al., 2016). It appears that the current implemented strategies, mostly based on affordability, are not sufficient and a focus on value and commitment could be beneficial to the non-Orthodox Jewish day school financial sustainability crisis. At the very least, more research must be done.

Endowment

Finding 3 also discussed the role of the endowment sustainability strategy, wherein investing in an endowment was identified as an important sustainability strategy, but the

leadership practice did not match the belief. This strategy revealed the largest discrepancy between the rated importance and the rated frequency. Put another way, the strategy of endowment had the biggest gap between how important leaders thought it was and how often they were creating or adding to one. This leads to the hypothesis that Toronto non-Orthodox Jewish day school leaders feel that they are underutilizing this strategy.

As shown in the literature review, some individual Jewish day schools and communities in North America have attempted to raise funds for an endowment. Endowment money can be used “to be ready for emergencies, to fund new initiatives, to alleviate pressure on the annual campaign, and to facilitate affordability initiatives” (Rosov, 2017, p. 9). For schools looking to make a longer-term impact to the financial health of their organizations, endowments can be the answer. “In the longer term, endowments offer the promise of an additional, reliable revenue stream for schools” (Kardos, 2018). Even some public school communities have looked into establishing endowments (Loehr, 1992). In addition to raising funds for a school, endowments can also be used to support socially conscious companies which fits with the mission statements of most, if not all, Jewish day schools (Armoza, 2011). On top of financial support, there is also research that ties higher endowments to lower attrition rates. “Low attrition schools have significantly larger endowments than high attrition schools” (Mitchell and Galindo, 2002, pg. 15). Mitchell and Galindo’s research finding is significant as Jewish day school leaders mentioned enrollment as a key issue preventing them from focusing more on financial sustainability. The impact of enrollment concerns will be discussed in the next section.

Additionally, some research points to the necessity of seeing an endowment as simply money to be used. Based on the experience of a medical school endowment in Wisconsin, the reviewers of the endowment suggest its leaders to also play a role in how the funds are used.

In addition to being investors, we must also be brokers who leverage other non-financial resources and participate in funding collaboratives, conveners who provide a neutral leadership role for the discussion of key issues, learners who identify trends and best practices, and influencers who serve as catalysts for policy and advocacy issues. The traditional model of writing a check and waiting for results will not be our model moving forward (Maurana et al., 2016, pg. 46).

When endowment leaders take an active role in how the funds are used, there is a greater impact towards the initiatives the endowment is funding.

Because an endowment only makes use of the interest earned, an endowment must be quite large in order to be impactful. Some communities have worked on communal endowments that go towards supporting all of the Jewish day schools in the community, Los Angeles, Chicago, Montreal, and New Jersey for example (Kessler, 2017). Because very few Jewish communities or schools have set up endowments, they are not an immediate fix, but can be implemented for communities that are trying to think more about long-term solutions. There is another positive aspect of raising money towards endowments, “While it is true that endowment fundraising can be the toughest dollars to raise, once a school community sees the endowment dollars directly impacting the budget’s bottom line, the school is better positioned to raise even more endowment dollars” (Kahn, 2018). The more money a community or school can raise towards an endowment, the easier it then becomes to raise even more money for the endowment.

In Toronto, there is at least one non-Orthodox Jewish day school with an established endowment. However, in the words of this Head of School, “You know we have an endowment, but that's not going to take us anywhere. We'd need millions” (Head of School C, 2019). Based on the experience of this head of school, simply having an endowment is not enough. It has to be a very substantially sized endowment in order to have an impact on the long-term financial sustainability of the institution. Another school in Toronto has also recently started an endowment, but it is too early to gauge the effect it is having. Many other heads of school talked about wanting an endowment, but didn't have one.

When examining the head of school interview data with the school leader questionnaire data, it is difficult to fully comprehend why leaders see endowments as the most underutilized sustainability strategy. While many leaders point to a desire to want an endowment, there is very little data in the Toronto community pointing to effectiveness of endowments. Money raised for endowment funds could be money that may have gone to other school needs or initiatives. It is very challenging to raise enough funds to make the impact substantial, and the one known school that has an established endowment is not convinced of the positive effect.

However, when looking at the literature that researched the potential positive impacts of endowments, it is clear that endowments could play a very important role in the long-term financial sustainability of Toronto Jewish day schools. Additionally, studies show that they can help with attrition, they can help lead to further fundraising, and they can serve to support the whole community and not just individual schools. Therefore it is not surprising that Toronto Jewish day schools leaders point to endowments as the most underutilized sustainability strategy.

The finding in this research study related to endowments points to the clear need for a more focused study on endowments.

Criteria for Success

Finding 5 states that leaders use specific criteria of success to determine the level of impact of sustainability strategies to the financial sustainability of their institutions. This finding was determined based on the fact that all interviewed heads of schools mentioned specific criteria they utilize to evaluate the success of a sustainability strategy. These criteria include:

- Positive impacts to retention and attrition
- Positive impact to financial health of the school
- Successful fundraising
- Ability for the school to maintain its desired educational philosophy and approach
- Achievement of a predetermined goal

If all eight heads of schools are using this criteria-based method then one could make the argument that it constitutes best practice.

The idea of criteria-based decision making is not a novel approach. Criteria is a central part of decision making. “Decision-making can be simplified as the choice of an option from a set of alternatives by an actor or a group of actors in response to a problem faced by an organization, with this choice being guided by a number of very precise criteria” (Zaraté, 2013, pg. 1). Often there is more than one criterion to consider in the decision making process and there is a line of research focused on this idea called Multi Criteria Decision Making (MCDM). “Multi criteria decision making (MCDM) is one of the most widely-used decision methodologies in the sciences, business, government and engineering worlds. MCDM methods can help to

improve the quality of decisions by making the decision-making process more explicit, rational, and efficient” (Jayant and Sharma, 2018, pg. 65461). When considering different criteria in the decision-making process, one needs to weigh each criterion differently, a source of great importance, complexity and debate. “Taking into account the fact that the weights of criteria can significantly influence the outcome of the decision-making process, it is important to pay particular attention to the objectivity factors of criteria weights” (Odu, 2019, pg. 1449). Having criteria for judgment is also part of the critical-thinking process (Case and Daniels, 2016), and critical thinking has been touted as one of the 21st century skills that all students need (Wagner, 2008). Therefore, there is a lot that school leaders should consider when determining criteria of success for sustainability strategies. Based on the research, it is not surprising that heads of Jewish day schools use criteria in determining the success of sustainability strategies.

However, what is surprising is that school leaders do not appear to have well thought out criteria, with weights given to each one, to determine optimal indicators of success. As aforementioned, there is a large body of research that has examined taking into account multiple criteria and giving weights to the different criteria. This process can lead to better decision making. It is an area of research that could benefit leaders of Jewish day schools if they desire to refine and improve their criteria of success. This could be an example of an adaptive solution, a solution that is new, based on the current needs of the time, and worth further exploration.

This section discussed the findings related to the second guiding research question of the study. The next section will discuss findings related to the final guiding research question of the study.

Discussion of the Findings for Guiding Research Question #3: What do leaders of Jewish day schools believe to be the factors and conditions that increase and inhibit their capacity to focus on school sustainability?

In this section, Finding 6 and Finding 7 and their implications regarding Guiding Research Question #3 are discussed.

The Impacts of Time and Enrollment

Finding 6 found that lack of available time and maintaining or increasing enrollment are the biggest factors in preventing non-Orthodox Jewish school leaders from focusing more on sustainability efforts. While leaders identified these as two separate issues, they are very much related, as focusing on maintaining or increasing enrollment was one of the biggest time commitments that prevented leaders from focusing on other financial sustainability initiatives. School leadership is a very dynamic and complex job. Leaders have so many responsibilities that it is rare they can just focus on one issue. This includes financial sustainability. Through the study, I attempted to identify what competing pressures or job conditions are most likely to get in the way of focusing solely on financial sustainability. Based on the questionnaire, the most consistent answers were a lack of time and the necessity to focus on school enrollment. Put another way, if school leaders had more time and if they didn't have to worry about enrollment, then they could devote more of their efforts to financial sustainability. However, it is interesting to note, that in other questions of my study, leaders mentioned that given extra time they may choose to use the time on other important school responsibilities. There appears to be a contradiction in that leaders say they need more time to focus on financial sustainability, but if they had more time, they might not use it for sustainability.

Time and Priorities. School leaders, especially principals and heads of schools, have more responsibilities today than previous leaders. There has been a “transformation from the principal’s role of manager to that which is inclusive of instructional leadership” (Grigsby, B., Schumacher, G., Decman, J., & Simieou Iii, F., 2010, pg. 1). “Today, the principals’ responsibilities include a deeper and broader involvement in the mechanics of teaching and learning, the use of data to make decisions, and prescribe and participate in meaningful and innovative professional development” (Grigsby et al, pg. 1). With an increase in responsibilities comes a corresponding increase in the amount of time it takes to do the job effectively. Most of the leaders that took part in the questionnaire and the interviews are responsible for the managerial aspects of their role as well as the instructional leadership aspects of the role. Adding financial sustainability to the mix only serves to increase the time demands placed on school leaders.

Practically speaking, school leaders of the Jewish day schools of Toronto have to delegate more individuals to assist them and/or learn how to get better at time management. “It has emerged from research findings that effective leadership need not be located in the person of one leader but can be dispersed within the school” (Muijs and Harris, 2003, pg. 7). There is simply too much for one person to do alone or to do in the same way they have done previously in order to effectively complete the requirements of the job. A key finding from the questionnaire in this study revealed the considerable amount of time mid-level administrators also devote to financial sustainability. Additionally, these mid-level administrators want to be involved in more big picture issues at schools. “Various research studies indicate that assistant heads (an example of a mid-level administrator) in general wish to increase their leadership capability through more

involvement in planning, policy making, staff and curriculum development and external relationship roles” (Muijs and Harris, 2003, pg. 7). Therefore, one possible solution is for school heads and board members to include more principals, vice principals, deans and directors of finance in the conversations surrounding financial sustainability. Based on the questionnaire data, it is clear that there are a number of these individuals at every Jewish day school that are already devoting time to the topic. Giving them more responsibility around this issue could make it easier for the heads of school to fulfill their many other expectations. While some of the smaller schools in Toronto do not have as many mid-level administrators to delegate financial sustainability work to, there are a number of larger schools with several mid-level administrators that could take on some of these tasks.

Another potential solution is to involve the entire Jewish community in the leadership of Jewish day schools. The general community may not be aware of all of the demands it has placed upon the leaders of Jewish day schools. Engaging the community in a conversation could help to redefine the role of the school leader as one that focuses more on the finances or more on the academic program. Do they want a fundraiser or an educational leader? Once decided, someone else could be hired to serve in the other capacity, whether that be support on the business management side or the educational leadership side. It should be noted that studies indicate that creating a community-minded school between community and leader is possible, but doesn't happen on its own. It takes certain leadership dispositions, skills, and knowledge to make it effective (Purinton, Azcoitia, and Carlson, 2018). Involving the community with the leadership could help to better define the expectations placed on Jewish day school leaders, allowing them to more easily designate where to devote their time.

As mentioned earlier, it is my belief that the leaders of Toronto would benefit from working together. For example, if there is a donor that wants to give money to the entire Jewish educational community, schools may be better served to work together than to compete for the same money. As head of school C said in the one-on-one interview, “There are so many people fundraising for the same dollars.” Additionally, many leaders have developed time-management strategies to better meet the competing needs of the job. They could learn these strategies from each other and help one another. In terms of getting extra help and support for leaders, some schools may have developed positions at their schools that have served to help the leaders with time management. Sharing this information could be beneficial for all. Finally, it is an issue that affects all schools, but the schools are trying to solve the issue on their own. Solving the issue on the individual school level is not an efficient way to solve the problem. There is bound to be a fair amount of overlap with each school engaging in similar strategies and coming to similar conclusions, when they could all be better served if just one person did that work. By working together they could delegate tasks so that more schools benefit from the work of a smaller number of people. They would then have more time to devote to other important tasks. In addition, there are some roles the United Jewish Appeal of Toronto’s Jewish education wing could take over, freeing up even more time for school leaders. The idea of assigning different tasks to different levels of a school system is not a new idea. The province of British Columbia in Canada restructured its educational program to limit the level of bureaucracy and overlap (Society for the Advancement of Excellence in Education, 1997).

Maintaining Enrollment. School leaders also identified enrollment as a leading challenge impeding their ability to focus on financial sustainability. Enrollment is, of course,

directly tied to sustainability. Without a healthy enrollment, it would be very difficult for a school to remain financially sustainable. While enrollment is clearly tied to the financial health and sustainability of a school, devoting so much time to enrollment prevents leaders from spending time on big-picture issues related to financial sustainability such as affordability and perceived value.

A focus on enrollment impacts school leaders in many different ways. For example, it is important to work with the admissions department to have a full class in the incoming entry-level grade at school. While it is impossible to come up with a complete list, the focus on first-year enrollment could be in the form of meeting with prospective parents, meeting and planning with the admissions and marketing teams, and ensuring that the perceived value of the program at the school is one that is drawing in potential families. Once students are enrolled, school leaders then have to work hard to keep the students in the school until graduation. Student attrition is an issue in private schools that cannot be overlooked. The National Association of Independent Schools (NAIS) conducted a study on independent school attrition in 2002 and found that even schools with a low attrition rate still had some attrition - 3.43 percent (Mitchell and Galindo, 2002). Some students leave schools for reasons that a school can't control (e.g. geographic relocation), but there are also reasons that schools can control (e.g. academic program, affordability). Since most of a Jewish day school's income derives from tuition dollars, it is important that the school leaders do what they can to keep families happy and limit attrition.

The NAIS presented some best practices that may lead to lower attrition rates. Implementing some of these suggestions could help school leaders lessen the time they have to devote to enrollment as a lower attrition rate will result in a healthier enrollment for the school.

These best practices include: Having well-paid, highly-educated teachers; hiring professionals that impact culture and student well-being; moderate increases in enrollment and slight increases in student-teacher ratios; providing more student access to computers and committing more operational resources to technology; increasing financial support from the school to families in need; and increasing parent participation and larger gift-giving in annual fund drives (Mitchelle and Galindo, 2002).

Currently, leaders have to do all they can to keep their families satisfied and supported as the schools rely on their tuition dollars to remain financially sustainable. In addition, if a student leaves non-Orthodox Jewish day school A and goes to non-Orthodox school B then that would likely be good, at least financially, for school B and bad for school A. They are in direct competition with one another. An additional challenge for leaders is to try to develop a way for the financial sustainability of individual non-Orthodox Jewish day schools to be less conflated with enrollment and competition with one another. One way to do that would be to unite the schools into some sort of collective body or school board. As a collective body, the overall financial health of a school would not be affected if a student went from one school to another. The direct impact would be if a student leaves the non-Orthodox school system for another school outside the system. Since this would affect the schools anyway if they were not in a unified system then I don't see that as an additional risk. By belonging to a unified board, I believe that the concerns of enrollment in their individual schools would play less of a role in preventing school leaders from thinking about financial sustainability.

Solutions to both problems of financial sustainability and maintaining enrollment can be supported by empirical data. Leaders can learn about best practices, where to maximize their

efforts and where to minimize their efforts, and collaborating so that their findings are beneficial to more than just themselves or their schools. This information will allow them to be more purposeful in terms of where they designate their time and efforts, and then allow them to devote more energy towards the larger issues related to financial sustainability.

The Sustainability Practices of non-Orthodox Jewish schools are Contingent on the Manner in Which Leaders Choose to Spend Their Time and Other Resources.

Finding 7, revealed that non-Orthodox Jewish schools sustainability practices are contingent on the manner in which leaders choose to spend their time and other resources, and all school leaders implement a number of sustainability strategies at the same time. Some of these strategies, such as fundraising, are common to all schools. However, there were many other strategies that were site dependent and based on choices made by the leaders which they felt would best suit the unique needs of their schools. In essence, there are many context and site specific factors that impact the financial sustainability practices of a school. This makes it very hard to determine universal best practices for non-Orthodox Jewish day school financial sustainability as each school has distinct qualities that must be taken into account.

When asked which changes to their respective roles would allow the leaders to spend more time on financial sustainability (question 9 in the questionnaire), variations in the answers revealed a wide range of needs. Their answers included: more administrative support, change in board structure, more time out of school to think and meet with people, needs to be a community discussion, making it a specific mandate, focusing less on day to day operations, off-loading some responsibilities to others, and more training on financial sustainability. The diversity of

ideas expressed reveals that leaders bring varied skills and interests to their position, and sustainability practices must be unique to each school/leader.

The role of context in the decision making process of school leaders is seen throughout the literature (Bryank, Berry, and Cevik, 2019; Dinham, Cairney, Craigie, and Wilson, 1993; Kelley, Thornton, and Daugherty, 2005), just to name a few. If the context is so unique, then perhaps it would be helpful to have universal criteria of success of sustainability strategies. When school leaders track the respective impacts of the implemented strategies, and they know what they consider to be successful, then they will be better equipped to decide which strategies best meet the needs of their school community. Heads of schools identified a number of criteria when determining the success of a sustainability strategy. These included checking the balance sheet, student enrollment data and retention trends, retention of staff, achievement of a predetermined goal, ability to maintain the school's educational philosophy, and increased fundraising dollars. There was a great deal of overlap in the criteria for success used in all schools. Thus, if a school is able to track the relationship between an implemented sustainability strategy and the success criteria listed above then they know it worked. Earlier in this chapter, I discussed the important role of criteria based decision making. I did not ask the heads of schools during the interviews if they were able to relate the success criteria to the specific sustainability strategies they implemented. This would require further research and should be considered as it could provide additional support to schools as they try to become more financially sustainable.

I would like to conclude this section by considering how leaders can devote more time to thinking about and acting on financial sustainability. Overall, one could argue that the best way for leaders to find more time to devote to sustainability is to be more organized and effective as a

leader. As was discussed previously, school leaders have so much more to contend with in the 21st century, and to be a successful school leader requires new skills. There is a fair amount of literature that discusses best practices in school leadership. Hoerr mentions two ideas that are worth considering. The first one is that “leadership is about relationships” (Pg. 7, 2005). Building relationships with all stakeholders in the school should allow a leader to be better at his/her job and should also allow the leader to spend more time thinking about financial sustainability. The second idea is to try your best to predict your needs in the future. While this can’t be done for everything, Hoerr suggests three areas that can be predicted. “I see three areas that will have an effect on schools and educational leadership: ever-expanding technology, changing family life, and increased accountability and competition” (pg. 173). Being predictive will allow leaders to better consider the role of financial sustainability in their institutions, not just today, but also down the road. In chapter 2 of this dissertation, I discussed some of the necessary areas of focus for 21st century school leaders that were presented by a Rosov study in 2018: Vision or direction-setting, personnel development and empowerment, organizational management, instructional leadership, community-building (Rosov 2018). I suggest that if you are a leader who can implement all of the above effectively--build relationships, consider future challenges, establish vision, empower and develop personnel, develop organizational management, provide instructional leadership, and build community--then you will have more time to devote to sustainability efforts.

List of Recommendations for School Leaders

The data point to several recommendations for school leaders working on financial sustainability at non-Orthodox Jewish day schools.

1. Continue working on improving the financial sustainability of your institution. Ensuring financial sustainability is a key component to long-term success, thus it is something school leaders have to continue to work on.
2. Involve mid-level administrators. They are already thinking about the issue and involving them will provide more people to tackle the many tasks within financial sustainability implementation. Additionally, giving them more responsibility around this issue could make it easier for the heads of school to fulfill their many other expectations.
3. Don't go at it alone. Financial sustainability is in need of an adaptive solution. Adaptive solutions can best be found when working collaboratively.
4. Solve the issue through a systems-based approach. Financial sustainability is very complex and can only be understood on the systemic level.
5. Focus on more value and commitment strategies to get more people to consider Jewish day school. In particular, leaders are encouraged to make the value proposition explicit in marketing and admission strategies.
6. Establish a community endowment. They are good long-term investments that allow for money to be used by the institutions well into the future, they can help with attrition, they can help lead to further fundraising, and they can serve to support the whole community and not just individual schools.
7. Establish clear and weighted criteria to help you determine success of sustainability strategies. This will help leaders decide which strategies will be optimal for their schools and communities.

8. The board is encouraged to ask the head of school what changes to his/her role would result in an increased ability to focus efforts towards to the long-term financial sustainability of the school.

Future Research

While this study answered many questions, it also leads to the formation of other questions. The section below goes into greater detail about other possible studies that could help to answer some of the questions that arose in this study.

The Relationship Between Importance and Frequency in Jewish Day School Sustainability Strategies

In all but one case, the level of importance of specific sustainability strategies was rated higher by leaders than the frequency at which that same sustainability strategy was implemented. One would hypothesize that the frequency would closely match the level of importance. The more important a sustainability strategy is perceived to be, the greater the frequency at which it would be implemented. Understanding the reasoning behind this discrepancy could have major implications for the field. Is the discrepancy simply a wake-up call that we need to implement the strategies with higher frequency? Is it impossible for us to implement the strategies at a frequency that we think is necessary in order to be successful? Do we also need to relate these two concepts (importance and frequency) to effectiveness in order to make proper sense of the data? How are the leaders determining what makes a strategy important? All of these questions could be answered in a future study, and the results could help school leaders better determine where to focus their efforts towards financial sustainability.

The Potential Impact of Mid-Level Administrators in Jewish Day School Financial Sustainability

Most literature discusses the role of heads of school, board members, and Jewish community leaders as the key players in solving the financial sustainability crisis in Jewish day school. One of the surprises in this study was the amount of time school administrators such as principals, vice principals and deans spent dealing with financial sustainability. Table 2 in chapter 4 showed that administrators spend more time, on average, engaging in conversations about financial sustainability than heads of school and board members. Before the study, it was assumed that heads of school and board members assume the biggest role in financial sustainability efforts at a school. The results of the study point to a different conclusion. Should administrators be more involved in the process than they currently are? How will schools gain from having administrators assume a larger role in sustainability strategies? Further research will provide answers to these questions.

Collaborative Efforts of Jewish School Leaders

This study showed that there are only limited collaborative attempts to solve the issue of non-Orthodox Jewish day school financial sustainability. However, there was enough discussion about communal collaboration in this study to know that, at the very least, it should be considered. At this point it is mere conjecture as to whether tackling the issue of financial sustainability would benefit from a community-wide endeavor. When rated, cross-school collaboration had the third highest difference between rated importance and frequency. School leaders clearly think that the frequency in which they engage in cross-campus collaboration does not match the level of importance they place upon it. Why does this discrepancy exist? What role

could collaboration play in solving the issue rather than trying to solve the issue independently?

Would a governing board for all non-Orthodox Jewish day schools be helpful in increasing the level of collaboration and better supporting the financial sustainability of the day schools?

Further research into collaborative efforts and impacts could provide answers to these questions.

The Role of Endowment in Financial Sustainability

The sustainability strategy with the biggest difference between rated level of importance and rated level of frequency was establishing or increasing funds to an endowment. This leads one to the conclusion that school leaders feel that an endowment is the most underutilized sustainability strategy. There is at least one non-Orthodox Jewish day school with an established endowment, but that head of school does not feel that it provides substantial income. Another school has recently started an endowment and does not yet know if it will assist with the school's objective of better achieving its mission. There were many other heads of school who expressed that they wished that they had an endowment, but do not. Additionally, some communities have established citywide endowments to help with all of the Jewish day schools in the community. How effective are endowments towards helping the issue of financial sustainability of Jewish day schools? Further research on the efficacy of endowments, specifically for the individual Toronto schools or the Toronto Jewish educational community, should take place in order to better understand the large gap between importance and frequency that was determined in this study.

Case Study: The Toronto Orthodox Jewish Day School System and Financial Sustainability

The Orthodox Jewish day school system must contend with the challenge of affordability, however they do not have a comparable issue with perceived value and commitment. Over 80%

of Orthodox families send their children to Jewish day school. What is the Orthodox movement doing and what can the non-Orthodox movement learn from them? What sustainability strategies have they tried and what have been the results? In addition, there may be specific strategies that the Orthodox Jewish day schools are using that could transfer to the non-Orthodox Jewish day school system. A case study that looks closely at the financial sustainability of the Orthodox Jewish day school system of Toronto could help to answer these questions and provide insight.

Financial Sustainability Best Practices in Non-Orthodox Jewish Day Schools

Many of the sustainability practices are determined by the leaders of the specific schools. They make their decisions based on the unique contexts and needs of their individual schools. It was very difficult to establish sustainability strategy best practices for all schools as each school is so different; what works for one school may not work for another. However, there were a number of findings from this study that related to the larger Toronto non-Orthodox Jewish day school system as a whole. Currently, it is not known if these findings would be beneficial for other non-Orthodox Jewish day school communities in the world, especially in North America. Are the challenges and needs similar enough that these findings would be applicable or are they specific to each community? Further research could help us to answer that question as well as help to determine best practices, regardless of the unique needs and characteristics of the school community.

The Impact of Value and Commitment Strategies on Jewish Day School Financial Sustainability

School leaders identified that the two biggest issues impacting non-Orthodox Jewish day school financial sustainability are affordability and perceived value. One would expect,

therefore, that there would be a focus on developing sustainability strategies to help with both of these critical issues. The literature discusses a large number of strategies related to affordability, but far fewer strategies related to value and commitment. More research needs to be done as to why. Is it harder to develop and implement sustainability strategies related to value and commitment? Are school leaders less aware of strategies that directly relate to value and commitment? Do leaders believe that strategies related to value and commitment are less effective in their impacts on the financial sustainability of schools than strategies related to cost and affordability? Knowing the answers to these questions could help leaders more effectively develop strategies that improve the perceived value of Jewish day school education.

Proving Causation Between Sustainability Strategies and Effects on Financial Sustainability

In the interviews conducted in this study, some heads explained that it isn't always easy to prove a causal link between the implementation of a sustainability strategy and the impact, positive or negative, on financial sustainability. This is an important link to be able to prove as it would enable schools to know which strategies have the greatest positive impact on the financial sustainability of the school. To do this may entail the development of new tools or better information-tracking instruments. Research focusing on how to demonstrate changes to financial sustainability based on implemented sustainability strategies could greatly benefit school leaders that want to determine best practices for the financial sustainability of their institutions.

Understanding Long-Term Financial Sustainability in the 21st Century

Two of the interviewed heads of school in this study feel that they have achieved the goal of long-term financial sustainability at their schools. Case studies of these schools could reveal a

lot about financial sustainability best practices. Are they doing something different from the other schools? Is their community different such that it allows for greater financial sustainability success? Are they defining long-term financial sustainability in the same way as the other school leaders? What can we learn from these schools that can be applied to and used at other schools? Answers to these questions could be of great benefit to all of the non-Orthodox schools in Toronto as they would provide greater insight into how to achieve long-term financial sustainability.

Final Reflections

This chapter was a presentation of my findings and the implications of these findings. However, there are a few ideas that impacted me more than others and I believe are vital to consider at every step of the process. The first is the idea that we are in need of an adaptive solution. Adaptive solutions are solutions that have yet to be discovered. They require new learning and new ideas because the problem they are trying to solve is new and, currently, without a clear solution. Many ideas have been tested, some with more success than others. The fact that so many schools are struggling with sustainability tells me that we have yet to find a viable solution. We need to adapt, learn more, and work together to discover new solutions to help. So the first thing I wish to leave the reader is our need to **focus on adaptive solutions as opposed to technical solutions** which are problems in which we already know how to successfully respond to them.

Adaptive solutions take time, effort, and collaboration to allow us to see the issue with new perspectives. This leads into the second key learning I took away from this process. The second important idea I ask the reader to consider is the necessity of attempting to **solve this**

issue collaboratively. Success for one school is not enough. We are in search of answers to help the entire Jewish day school system. The best chance we have to help the entire system is to solve the issue in a collaborative manner. This is beginning to happen in Toronto and elsewhere. On a monthly basis, the heads of all of the Jewish day schools in Toronto meet to discuss common issues and opportunities. The goal of these meetings is to learn from one another so that all of the schools can be better. There is also a specific role within the Jewish Federation of a person who is committed to working towards the long-term sustainability of Jewish education in Toronto, including Jewish day schools. This person goes to the monthly head of school meetings, and he regularly meets with people in the community to raise money and help raise the perceived value and commitment of Jewish day schools. Through the donations of local funders, the community high school in Toronto is seeing increases in enrollment after many years of decline. That is cause for great optimism. However, more work needs to be done to help the feeder schools. The community high school is only as strong as the elementary Jewish day schools that prepare their students for the high school. Again, there is hope because the community is seeing this need and coming together. It is my own belief that the schools need to focus less on the competition they have with one another and more on how they can **collaboratively improve the entire system to get more families to partake in the Jewish day school experience. A healthier system, overall, will be better for all of the schools,** and I believe communal collaboration will get us there.

My final key takeaway results from my attempt to uncover all of the sustainability strategies that have been used by Jewish day schools. In my research I uncovered a number of strategies with the goal of making Jewish day school more affordable. However, as I have

mentioned throughout this dissertation, there are far fewer initiatives focused on increasing the perceived value of Jewish day school and increasing the commitment of families to send their children to Jewish day school. We can work to make the product (i.e. Jewish day school) more affordable, but if we don't have more families that want to take part in the Jewish day experience then affordability efforts will only take us so far. The final idea for the reader is that we need to **do a better job of convincing families of the value of Jewish day school education.**

By working on adaptive solutions, doing so in a communal manner, and focusing on the value of Jewish day school then I believe that we will be on our way to making Jewish day schools more sustainable both in the present time and also in the long-term.

When I began this dissertation journey, I had big plans to solve the Jewish day school sustainability crisis with my research. I had hoped that the interviews and questionnaire would shed certain facts and opinions that had gone unnoticed, until now. With these facts I would uncover a new approach that was bound to help improve the financial sustainability of Jewish day schools in North America. While I see now that my goals were entirely too lofty, along the way I met a number of people and read copious amounts of research that left me feeling optimistic. The sustainability of Jewish day schools is not just the concern of a few. There are many brilliant, inspiring, and passionate thinkers who have devoted much of their professional careers to finding ways to make the Jewish day school experience feasible and desired for all families throughout North America. While there is still cause for serious concern, there are so many people who are grappling with this problem, that I am confident new ideas and solutions are on the horizon.

During my interviews, there was one line that really stood out for me. “So what I know is that it’s important, and it’s unpredictable, and I think it’s continuous work and effort” (Head of School H, 2019). This one line summarizes the complexity of the financial sustainability issue. Just about everyone in the field of Jewish day school education agrees that it is important. In addition, what makes it so challenging is the unpredictability and the fact that it is never-ending work. I am happy to report that in Toronto and the rest of North America, there are many people who understand the complexity, unpredictability and the continuous hard work involved, and they are still committed to the cause. They haven’t given up and they want to keep working until they find longer-term solutions.

I would like to end by once again acknowledging the leaders of Toronto’s non-Orthodox Jewish day schools. They gave of their precious time to help further our research and understanding of Jewish day school financial sustainability. While I learned a lot, it is also my hope that through this process, they were exposed to new ideas and new learning through the questions I asked and the answers they gave. As with all research, the goal is new learning. If we have learned something new that will improve the financial sustainability of Jewish day schools, then the process was well worth the effort.

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Appendices

Appendix 1 – Informed Consent Letter for Survey

Dear Toronto Jewish Day School Leader,

I am a doctoral student in the joint Jewish educational leadership program at Lesley University and Hebrew College. As you know, Jewish day school sustainability is a very important issue in the community. I am passionate about Jewish education and have devoted my doctoral studies to making a contribution to field.

The purpose of this survey is to add to our growing knowledge of the factors and conditions that promote and inhibit non-Orthodox Jewish day school sustainability. The results of this study could be useful to you in your role as school leader, and I would be happy to share my final results with you.

With your permission, you will participate in a survey on sustainability strategies. This survey should take about 15-20 minutes to complete.

If you give permission to participate, you are free to discontinue participation at any time. You are also free to ask me questions at any point in the process. Everything will be done to preserve anonymity of the data. I will not use your name or identifying information in any of the reports or records. Your individual data will not be shared with any of the other people taking the survey. Additionally, a third party service will remove the names from the surveys so I will not know whose survey I am looking at. I have specifically not asked any demographic information so I will not be able to identify the school associated with each survey.

If you have questions about the project or your participation, please email me at seth.goldsweig@hebrewcollege.edu or call (647) 205-2048.

Sincerely,
Seth Goldsweig

This is the link in Qualtrics for the survey:

https://lesley.co1.qualtrics.com/jfe/form/SV_4Orv9agqovRoJOR

Appendix 2 - Informed Consent Letter for Interview

Dear Toronto Jewish Day School Leader,

I am a doctoral student in the joint Jewish educational leadership program at Lesley University and Hebrew College. As you know, Jewish day school sustainability is a very important issue in the community. I am passionate about Jewish education and have devoted my doctoral studies to making a contribution to field.

The purpose of this study is to add to our growing knowledge of the factors and conditions that promote and inhibit non-Orthodox Jewish day school sustainability. The results of this study could be useful to you in your role as school leader, and I would be happy to share my final results with you.

In the interview, which should last between 10 to 20 minutes, you will be asked questions about your experiences with sustainability practices at your school. As a token of appreciation for your time and effort, a \$25 donation will be made to your school. In signing this form, you are indicating that you understand that there is minimal risk associated with this study.

The decision to take part in this research study is completely voluntary. You may ask me questions at any point in the process. You may decide to stop participating at any time in the interview. If you decide that you want to withdraw your participation after the interview, you should contact me directly.

In addition to deciding to participate in the interview, you are also agreeing to being recorded electronically. The recording will be transcribed (written down word for word) and checked for accuracy. Neither your name nor any other information that specifically identifies you will be associated with the recording or the transcript or used in any presentations or in written products resulting from the study. All names will be changed to preserve anonymity. The written words of your interview may be reproduced in whole or in part for use in presentations or written products that result from this study.

Sincerely,
Seth Goldsweig

MY SIGNATURE ON THIS FORM INDICATES THAT I CONSENT TO PARTICIPATE IN THIS STUDY.

The consent for audio recording is effective until the following date: 6/30/2019.

Name and Date

Signature

Appendix 3 - Survey Questions

Please answer the questions in this survey based on the following definitions:

Sustainability - the long-term financial and enrollment viability of the school—balancing its budget year after year and being able to withstand short and long term financial challenges including an affordable tuition rate, the steady demand for increased financial assistance and need to invest in a quality educational program.

Sustainability strategy - a plan of action designed to contribute positively to the goal of sustainability at a school

1. What is your leadership role at your school?

- a. Head of School
- b. Board Member
- c. Administrator
- d. Other _____

2. How often do you engage in conversations about Jewish day school sustainability?

Daily Weekly Monthly Yearly Never

3. What percentage of your time, when working for the school, do spend on addressing sustainability?

Greater than 50% 25-49% 5-24% Less than 5%

4. Who do you feel is responsible for dealing with the issues of Jewish day school sustainability?
(Check all that apply)

- You
- Jewish day school leaders
- Jewish community leaders

- Jewish day school parents
- The United Jewish Appeal (UJA)
- North American Jewish educational institutions such as Prizmah and PEJE
- Jewish educational donors such as Avi Chai and the Jim Joseph Foundation
- University academia
- Other (please list here):

5. To what degree do you feel addressing sustainability issues is part of your role and responsibility as a Jewish day school leader?

To a high degree To a moderate degree To a low degree It is not part of my role and responsibility as a school leader

6. As a school leader you have many roles and responsibilities. What level do you place sustainability strategizing and implementation as a leadership priority within this diverse set of roles and responsibilities?

	Sustainability is a	Sustainability is	Sustainability is one
a. Sustainability is	very important	somewhat	of the least
the most important	responsibility of my	important, but there	important
responsibility of my job, but not the most	job	are many other	responsibilities of
job	important	more important	my job
		responsibilities	

7. What are other priorities for Jewish day school lay and professional leaders? (List as many as you can think of)

8. To what extent are each of the following factors and conditions impacting your ability to focus on sustainability?

Level of impact

	High Extent	Medium High Extent	Medium Low Extent	None at all
Finances of the school				
Time				
Governance				
School enrollment				
Competition with other schools				
The academic program of the school				
Personal education and understanding of the topic				
Day to day issues at school				
Your personal life				

9. What changes to your role would allow you to devote more time to sustainability issues? (open ended question)

10. What do you identify as the key issues affecting non-Orthodox Jewish day school sustainability? (open ended question)

11. On a scale of 1-4 (1=None; 2=Little; 3=Some; 4=Most) please rate the following strategies on their impact to sustainability your school:

Importance refers to how important the school leader feels the action or behaviour is to the sustainability of his/her school.

Frequency refers to how often the action or behaviour is offered or enacted.

	Column Options					Column Options			
	Importance of Experience					Frequency of Participation			
	1	2	3	4		1	2	3	4
Outsourcing general studies to a publicly funded system or seeking government funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cutting costs by eliminating programs or becoming more efficient in spending	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shifting or consolidating administrative responsibilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Spending money to improve the quality of the current school program being offered	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Investing in teacher development to improve the quality of the teaching	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increasing class size	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Limiting the number of grades or classes at your school	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Limiting course options	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Combining grades into one class (e.g., combining students in grade 2 and grade 3 into one class with one teacher)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consolidating campuses (only applicable to multi-campus schools)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amalgamating with another school	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increasing financial aid for families	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Offering interest free loans to cover tuition costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Implementing a middle income initiative such as: flat grant – a predictable grant, targeted for middle income families, based on income; tuition reduction for additional children; or flex tuition – a predictable tuition rate based on income (less than full tuition)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tuition initiatives such as: cutting tuition for all families; offering a free or reduced tuition for new students; establishing a lower tuition for younger grades; amortizing tuition payments over a longer time period; establishing one set tuition for the entire time student is at the school	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Focusing on marketing initiatives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advertising in the community about the importance of Jewish education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investing more resources in the admissions department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Paying close attention to retention trends	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Using data from surveys and focus groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Running programs for students younger than the first incoming class.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(e.g. Tots programs, pre-high school programs)		
Establishing a niche program (IB, Montessori, art, sports, technology, Hebrew intensive track, etc.)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Providing blended learning for students (an educational program that combines online digital learning with traditional classroom methods)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Opening admissions to the non-Jewish community	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Establishing, or increasing funds to, an endowment	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Prioritizing an annual campaign and fundraising	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Cross school collaboration such as: collective purchasing of materials with another school or schools; sharing human resources between campuses or schools; focusing on cross school collaboration - PD, marketing, recruiting	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Renting out empty space or sharing the campus with another school or organization	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Refusing admission to families that can't afford the tuition	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Establishing a Jewish education fund paid for by all members of the Jewish community, regardless of whether they have kids in Jewish day school	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Creating long distance learning opportunities for students to learn at your school, but from a different location.		

12. Are there any other sustainability strategies you have used that are not listed above? (please describe them here)

13. Which sustainability strategies do you see as being the **most** impactful towards the future sustainability of your school? (List 3)

14. Which sustainability strategies do you see as being the **least** impactful towards the future sustainability of your school? (List 3)

15. Since your time at your current position has Jewish day school sustainability become a greater or lesser priority, or has it stayed the same? (1 = Much greater priority; 5 = the same; 10 = a much lesser priority)



16. Is there anything else you would like to tell me about non-Orthodox Jewish day school sustainability? (Open ended question)

Appendix 4 - Interview Questions:

- How knowledgeable do you feel you are about school financial sustainability? Explain.
- Which sustainability strategies have been most successful for your school? Why do you think they were successful?
- How would you rate your personal level of impact on the successful implementation of sustainability strategies at your school?
- How do you evaluate or define success of the sustainability strategy? What criteria do you use in your definition of a successful strategy?
- Do you communicate your successes to the greater community? If so, how?
- Do you feel that your school has achieved the goal of long-term sustainability? Why or why not?
- To what extent do you view school sustainability as a major issue in Jewish day school education today? Explain.
- If you had more time in your day, or more money in the school's bank account, what else would you do towards the goal of sustainability?
- Is there anything else you would like to tell me about school sustainability?

Appendix 5

Results from survey question 11A and 11B - On a scale of 1-4 (1=None; 2=Little; 3=Some; 4=Most) please rate the following strategies on their impact to the sustainability of your school: Importance/Frequency

Average Level of Importance - Highest to Lowest

Name of strategy	Avg. Level of Importance	Avg. Level of Frequency	Difference between the 2
Prioritizing an annual campaign and fundraising	3.74	3.39	0.35
Investing in teacher development to improve the quality of the teaching	3.61	3.17	0.44
Establishing, or increasing funds to, an endowment	3.35	2.26	1.09
Paying close attention to retention trends	3.35	3.09	0.26
Spending money to improve the quality of the current school program being offered	3.26	3.04	0.22
Increasing financial aid for families	3.04	2.61	0.43
Focusing on marketing initiatives	3	2.87	0.13
Advertising in the community about the importance of Jewish education	2.78	2.3	0.48
Using data from surveys and focus groups	2.78	2.3	0.48
Shifting or consolidating administrative responsibilities	2.78	2.39	0.39
Running programs for students younger than the first incoming class. (e.g. Tots programs, pre-high school programs)	2.78	2.7	0.08
Implementing a middle income initiative such as: flat grant – a predictable grant, targeted for middle income families, based on income; tuition reduction for additional children; or flex tuition – a predictable tuition rate based on income (less than full tuition)	2.74	1.96	0.78
Establishing a niche program (IB, Montessori, art, sports, technology, Hebrew intensive track, etc.)	2.7	2.61	0.09
Tuition initiatives such as: cutting tuition for all families; offering a free or reduced tuition for new students; establishing a lower tuition for younger grades; amortizing tuition payments over a longer time period; establishing one set tuition for the entire time student is at the school	2.65	1.7	0.95

Investing more resources in the admissions department	2.61	1.96	0.65
Renting out empty space or sharing the campus with another school or organization	2.61	2.52	0.09
Cross school collaboration such as: collective purchasing of materials with another school or schools; sharing human resources between campuses or schools; focusing on cross school collaboration - PD, marketing, recruiting	2.57	1.7	0.87
Cutting costs by eliminating programs or becoming more efficient in spending	2.57	2.39	0.18
Consolidating campuses (only applicable to multi-campus schools)	2.48	2.35	0.13
Establishing a Jewish education fund paid for by all members of the Jewish community, regardless of whether they have kids in Jewish day school	2.22	1.39	0.83
Providing blended learning for students (an educational program that combines online digital learning with traditional classroom methods)	2.17	1.78	0.39
Limiting the number of grades or classes at your school	2.09	1.91	0.18
Outsourcing general studies to a publicly funded system or seeking government funding	1.96	1.43	0.53
Offering interest free loans to cover tuition costs	1.87	1.39	0.48
Amalgamating or merging with another school	1.83	1.39	0.44
Creating long distance learning opportunities for students to learn at your school, but from a different location.	1.61	1.26	0.35
Increasing class size	1.61	1.48	0.13
Combining grades into one class (e.g., combining students in grade 2 and grade 3 into one class with one teacher)	1.48	1.43	0.05
Opening admissions to the non-Jewish community	1.35	1.17	0.18
Refusing admission to families that can't afford the tuition	1.35	1.3	0.05
Limiting course options	1.3	1.3	0

Average Level of Frequency - Highest to Lowest

Name of strategy	Avg. Level of Importance	Avg. Level of Frequency	Difference between the 2
Prioritizing an annual campaign and fundraising	3.74	3.39	0.35
Investing in teacher development to improve the quality of the teaching	3.61	3.17	0.44
Paying close attention to retention trends	3.35	3.09	0.26
Spending money to improve the quality of the current school program being offered	3.26	3.04	0.22
Focusing on marketing initiatives	3	2.87	0.13
Running programs for students younger than the first incoming class. (e.g. Tots programs, pre-high school programs)	2.78	2.7	0.08
Increasing financial aid for families	3.04	2.61	0.43
Establishing a niche program (IB, Montessori, art, sports, technology, Hebrew intensive track, etc.)	2.7	2.61	0.09
Renting out empty space or sharing the campus with another school or organization	2.61	2.52	0.09
Shifting or consolidating administrative responsibilities	2.78	2.39	0.39
Cutting costs by eliminating programs or becoming more efficient in spending	2.57	2.39	0.18
Consolidating campuses (only applicable to multi-campus schools)	2.48	2.35	0.13
Advertising in the community about the importance of Jewish education	2.78	2.3	0.48
Using data from surveys and focus groups	2.78	2.3	0.48
Establishing, or increasing funds to, an endowment	3.35	2.26	1.09
Implementing a middle income initiative such as: flat grant – a predictable grant, targeted for middle income families, based on income; tuition reduction for additional children; or flex tuition – a predictable tuition rate based on income (less than full tuition)	2.74	1.96	0.78
Investing more resources in the admissions department	2.61	1.96	0.65
Limiting the number of grades or classes at your school	2.09	1.91	0.18

Providing blended learning for students (an educational program that combines online digital learning with traditional classroom methods)	2.17	1.78	0.39
Tuition initiatives such as: cutting tuition for all families; offering a free or reduced tuition for new students; establishing a lower tuition for younger grades; amortizing tuition payments over a longer time period; establishing one set tuition for the entire time student is at the school	2.65	1.7	0.95
Cross school collaboration such as: collective purchasing of materials with another school or schools; sharing human resources between campuses or schools; focusing on cross school collaboration - PD, marketing, recruiting	2.57	1.7	0.87
Increasing class size	1.61	1.48	0.13
Outsourcing general studies to a publicly funded system or seeking government funding	1.96	1.43	0.53
Combining grades into one class (e.g., combining students in grade 2 and grade 3 into one class with one teacher)	1.48	1.43	0.05
Establishing a Jewish education fund paid for by all members of the Jewish community, regardless of whether they have kids in Jewish day school	2.22	1.39	0.83
Offering interest free loans to cover tuition costs	1.87	1.39	0.48
Amalgamating or merging with another school	1.83	1.39	0.44
Refusing admission to families that can't afford the tuition	1.35	1.3	0.05
Limiting course options	1.3	1.3	0
Creating long distance learning opportunities for students to learn at your school, but from a different location.	1.61	1.26	0.35
Opening admissions to the non-Jewish community	1.35	1.17	0.18

Difference Between Importance and Frequency - Highest to Lowest

Name of strategy	Avg. Level of Importance	Avg. Level of Frequency	Difference between the 2
Establishing, or increasing funds to, an endowment	3.35	2.26	1.09
Tuition initiatives such as: cutting tuition for all families; offering a free or reduced tuition for new students; establishing a lower tuition for younger grades; amortizing tuition payments over a longer time period; establishing one set tuition for the entire time student is at the school	2.65	1.7	0.95
Cross school collaboration such as: collective purchasing of materials with another school or schools; sharing human resources between campuses or schools; focusing on cross school collaboration - PD, marketing, recruiting	2.57	1.7	0.87
Establishing a Jewish education fund paid for by all members of the Jewish community, regardless of whether they have kids in Jewish day school	2.22	1.39	0.83
Implementing a middle income initiative such as: flat grant – a predictable grant, targeted for middle income families, based on income; tuition reduction for additional children; or flex tuition – a predictable tuition rate based on income (less than full tuition)	2.74	1.96	0.78
Investing more resources in the admissions department	2.61	1.96	0.65
Outsourcing general studies to a publicly funded system or seeking government funding	1.96	1.43	0.53
Offering interest free loans to cover tuition costs	1.87	1.39	0.48
Advertising in the community about the importance of Jewish education	2.78	2.3	0.48
Using data from surveys and focus groups	2.78	2.3	0.48
Amalgamating or merging with another school	1.83	1.39	0.44
Investing in teacher development to improve the quality of the teaching	3.61	3.17	0.44
Increasing financial aid for families	3.04	2.61	0.43
Providing blended learning for students (an educational program that combines online digital learning with traditional classroom methods)	2.17	1.78	0.39
Shifting or consolidating administrative responsibilities	2.78	2.39	0.39
Prioritizing an annual campaign and fundraising	3.74	3.39	0.35

Creating long distance learning opportunities for students to learn at your school, but from a different location.	1.61	1.26	0.35
Paying close attention to retention trends	3.35	3.09	0.26
Spending money to improve the quality of the current school program being offered	3.26	3.04	0.22
Opening admissions to the non-Jewish community	1.35	1.17	0.18
Limiting the number of grades or classes at your school	2.09	1.91	0.18
Cutting costs by eliminating programs or becoming more efficient in spending	2.57	2.39	0.18
Increasing class size	1.61	1.48	0.13
Focusing on marketing initiatives	3	2.87	0.13
Consolidating campuses (only applicable to multi-campus schools)	2.48	2.35	0.13
Establishing a niche program (IB, Montessori, art, sports, technology, Hebrew intensive track, etc.)	2.7	2.61	0.09
Renting out empty space or sharing the campus with another school or organization	2.61	2.52	0.09
Running programs for students younger than the first incoming class. (e.g. Tots programs, pre-high school programs)	2.78	2.7	0.08
Combining grades into one class (e.g., combining students in grade 2 and grade 3 into one class with one teacher)	1.48	1.43	0.05
Refusing admission to families that can't afford the tuition	1.35	1.3	0.05
Limiting course options	1.3	1.3	0

Appendix 6 - Toronto Jewish Day Schools Non-Orthodox Population

TORONTO JEWISH DAY SCHOOLS NON-ORTHODOX POPULATION

	Nursery	JK	SK	Gr 1	Gr 2	Gr 3	Gr 4	Gr 5	Gr 6	Gr 7	Gr 8	Gr 9	Gr 10	Gr 11	Gr 12	Totals
2009-2010	99	328	456	470	535	496	412	455	424	410	412	357	399	366	335	5954
2010-2011	140	321	465	518	458	505	431	390	423	385	402	358	339	367	342	5844
2011-2012	135	362	442	519	501	428	459	401	354	378	375	339	357	322	354	5726
2012-2013	116	336	537	446	496	471	395	421	371	327	357	318	336	343	314	5584
2013-2014	112	374	432	519	433	468	432	368	384	341	321	322	299	329	333	5467
2014-2015	125	391	419	445	490	407	425	408	337	336	331	249	307	283	326	5279
2015-2016	129	346	446	447	414	456	377	391	362	302	328	251	234	276	276	5035
2016-2017	189	327	399	452	433	361	421	332	350	314	278	235	243	220	268	4822
2017-2018	49	372	380	413	447	415	353	386	328	317	316	190	230	230	210	4636
2018-2019	70	334	408	367	407	427	402	337	352	301	302	298	206	232	226	4669
2019-2020	48	349	375	413	385	385	403	374	311	319	277	302	285	204	226	4656

Largest Cohort by Grade

Smallest Cohort by Grade

Schools: Associated, Bialik, Heschel, Leo Baeck, Paul Penna DJDS, Robbins Hebrew Academy, CHAT

Information provided by The Julia and Henry Koschitzky Centre for Jewish Education

Appendix 7 - Description of Qualtrics Program

The company gives the following description of the Qualtrics program:

ExpertReview analyzes every question in real-time and offers personalized survey design recommendations to boost response rates and get better quality data. It's powered by iQ and applies artificial intelligence and PhD-designed best practices to give you complete confidence before you launch . . . Qualtrics survey software was launched in 2002 as a way for academics to carry out sophisticated research that previously, online survey tools had been unable to handle because of the complex needs of academic research. It brought to the market advanced survey functionality and analytics, that would previously have taken researchers weeks and months of work, and automated it (<https://www.qualtrics.com/research-core/survey-software/>).

Appendix 8 - Description of NVivo Program

With data spread across so many different formats, finding connections can be extremely difficult and time consuming without the right tools. NVivo gives you a place to organize, store and retrieve your data so you can work more efficiently, save time and rigorously back up findings with evidence. Import data from virtually any source – text, audio, video, emails, images, spreadsheets, online surveys, social and web content and more. With advanced data management, query and visualization tools, NVivo lets you ask complex questions of your data so you can discover more and features best-in-class

accessibility options for all researchers (<https://www.qsrinternational.com/nvivo/what-is-nvivo>).

Appendix 9 - List of Heads of School, Interview Dates, and School Names

Dr. Greg Beiles. (2019, May 15). The Toronto Heschel School

Benjamin Cohen. (2019, June 24). Bialik Hebrew Day School

Dr. Jonathan Levy. (2019, June 4). The Anne & Max Tanenbaum Community Hebrew Academy of Toronto

Regina Lulka. (2019, June 6). Montessori Jewish Day School

Eric Petersiel. (2019, April 12). The Leo Baeck Day School

Dr. Amy Platt. (2019, April 10). Paul Penna Downtown Jewish Day School

Ora Shulman. (2019, June 27). Associated Hebrew Schools

Claire Sumerlus. (2019, April 16). Robbins Hebrew Academy