

Strategic Financial Modeling for Day School Stability

At this conference, you will approach financial management from a new perspective. Learn to position your school for stability and growth over multiple years by aligning your vision and mission with the resources your school raises and spends.

Teams of day school leaders who attend this conference will:

- See how a strategic financial plan fits into the annual budget cycle.
- Use benchmarking to help set financial goals.
- Create a rudimentary, multi-year strategic financial plan from a customizable model.
- Re-examine the way they invest in their school's vision and mission.
- Engage in big picture planning to inform the budget process beyond line-item allocations.
- Understand how theory from the Day School Peer Yardstick™ translates into usable tools.
- Test real-life examples of strategic financial planning with other Jewish day school practitioners.
- Discuss roles and responsibilities of the different members of the school's financial planning team.

WHO SHOULD ATTEND

Teams comprised of Heads of School, Board Chairs, Business Managers and Treasurers, as well as other key decision-makers. Teams of more than two are particularly encouraged. While this conference is not an introduction to financial management, it is appropriate for school leaders at all levels of experience, from beginners to advanced.

About PEJE Conferences

PEJE Conferences enable day school professionals and lay leaders to access expertise and resources while networking with colleagues from throughout the day school field. Integral to PEJE's mission of growing day school enrollment, the conferences promote collaboration, generate knowledge, and enable the sharing of best practices.

About PEJE

The Partnership for Excellence in Jewish Education, founded in 1997 by Michael Steinhardt and Rabbi Yitz Greenberg, is a collaborative of visionary Jewish philanthropists who seek to create a vibrant and sustainable Jewish future through strengthening the Jewish day school movement in North America, with a targeted goal of increasing enrollment in new and existing Jewish day schools.

PEJE Partners

The Beker Foundation	Riverdale, NY	The Marcus Foundation	Atlanta, GA
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PEJE

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Teachers and school children —
precious jewels of our community
MIDRASH RABBAH, SONG OF SONGS

PEJE Partnership for Excellence in Jewish Education
Conferences

Strategic Financial Modeling for Day School Stability

with **Sarah Daignault**, National Business Officers Association,
Sacha Litman, Measuring Success, Inc. and
Mark Mitchell, National Association of Independent Schools



For Teams of Jewish Day School Board Chairs,
Heads of School, Treasurers,
and Business Managers

Choose either location!

Parsippany, NJ
March 11-12, 2007

In cooperation with AMODS,
the Association of Modern Orthodox
Day Schools and Yeshiva High Schools

Phoenix, AZ
June 3-4, 2007

In cooperation with the Jewish
Federation of Greater Phoenix
and the Bureau of Jewish Education

Made possible with the generous support of Janine and Peter Lowy

ABOUT OUR SPEAKERS

Sarah Daignault is the Executive Director of the National Business Officers Association. NBOA is a virtual association providing professional development and information to independent schools. Prior to founding NBOA, Sarah spent five years as the Business Officer at Friends School of Baltimore and four years as the Business Manager at Bryn Mawr School for Girls. In addition to her work in school finance, Sarah has significant experience in independent school governance. For eight years she was the President of the Board of Trustees of Madeira School (VA). She also serves on the Board of the National Association of Independent Schools.

Mark J. Mitchell is the Vice President for School Information Services at NAIS. In this role, Mark oversees the operation of the School and Student Service for Financial Aid (SSS), providing support to schools and other organizations through workshops, resource material, and consultative guidance. Mark also oversees NAIS efforts to collect and disseminate independent school statistics from the NAIS StatsOnline service. After graduating from Northwestern University, Mark served as assistant director of financial aid at Northwestern and later as coordinator of new student aid at Lake Forest College. Mark is a member of the board at Moorestown Friends School (NJ), his high school alma mater.

Sacha Litman is the Founder and Principal Consultant of Measuring Success, Inc., a consulting firm dedicated to creating quantitative models for measuring and enhancing organizational effectiveness. Sacha has worked with PEJE to develop and implement the Day School Peer Yardstick™ benchmarking tool. Sacha holds a Bachelor's degree from Yale University, an MBA from the Kellogg School of Management, and a Master's in Public Policy from Harvard University funded by the Wexner Graduate Fellowship program. Sacha has worked for McKinsey & Company, where he consulted with both for-profit and non-profit clients including several Jewish organizations.

STEERING COMMITTEE

Carol Agronin, Akiba Academy of Dallas • **Vivian Alberts**, Westfield, LLC. • **Lise Applebaum**, Sinai Akiba Academy • **Harvey Beker**, PEJE Partner • **Shawn Burke**, Stephen S. Wise Temple Elementary School • **Gary Finder**, Emek Hebrew Academy • **Carolyn Flammey**, Solomon Schechter Day School of Greater Boston • **Michael Grad**, Joseph Kushner Hebrew Academy • **Jeanne Jacobs-Gaffney**, Sinai Akiba Academy • **Joe Kaplan**, Emery/Weiner School • **Elaine Kellerman**, Bureau of Jewish Education of Greater Houston • **Jill Kessler**, Pardes Jewish Day School • **Carol Kreditor**, Yavneh Academy of Dallas • **Steve Lorch**, Solomon Schechter School of Manhattan • **Esther Nathan**, Jewish Education Department of Greater Dallas • **Miriam Prum Hess**, Bureau of Jewish Education of Greater Los Angeles • **Kenneth Rochlin**, Ramaz • **Adam Schwartz**, Jewish Federation of Greater Phoenix • **Susan Brinn Siegel**, Charles E. Smith Jewish Day School • **Don Snyder**, Green, Hasson, & Janks • **Sharon Swedlow**, Austin Jewish Academy • **Fred Zeidman**, Jewish Federation of Greater Phoenix • **Linda Zell**, Bureau of Jewish Education of Greater Phoenix • **Mike Zucker**, Akiba Academy of Dallas

Strategic Financial Modeling for Day School Stability

Parsippany, NJ

Sunday, March 11 11:00 am - 9:00 pm
Monday, March 12 8:15 am - 3:30 pm

Hilton Parsippany
One Hilton Court
Parsippany, NJ 07054
973-267-7373

Participants are responsible for their own travel and hotel arrangements. A block of hotel rooms has been reserved at the Hilton Parsippany. Reserve your room with the hotel directly by calling 973-267-7373 or through the hotel link that can be found as part of the online registration form. Mention PEJE to receive special rate of \$149/night (taxes not included) for single or double occupancy. Directions and transportation information from Newark Liberty Airport can be found online as part of the registration form at www.peje.org.

This conference is presented in cooperation with:

Association of
Modern Orthodox
Day Schools and
Yeshiva High Schools



POST-CONFERENCE COACHING

Schools that attend both days of the conference will be eligible to apply for a grant for follow-up coaching with a consultant to refine and help implement a strategic financial plan. Details will be shared at the conference.

Phoenix, AZ

Sunday, June 3 11:00 am - 9:00 pm
Monday, June 4 8:15 am - 3:30 pm

Conference Site:
Ina Levine Jewish Community Campus
12701 N. Scottsdale Road
Scottsdale, AZ 85254
480-634-4944

Hotel:
Fairfield Inn-North Scottsdale
13440 N. Scottsdale Road
Scottsdale, AZ 85254
480-483-0042

Participants are responsible for their own travel and hotel arrangements. A block of hotel rooms has been reserved at Fairfield Inn-North Scottsdale. Reserve your room with the hotel directly by calling 480-483-0042. Mention PEJE to receive special rate of \$69/night (taxes not included) for single or double occupancy. The hotel will provide complimentary shuttle between their property and the conference site. Directions and transportation information from the Phoenix Sky Harbor Airport can be found online as part of the registration form at www.peje.org.

This conference is presented in cooperation with:

**Bureau of Jewish
Education
of Greater Phoenix**
Center for Lifelong Jewish
Learning
An Agency of the Jewish Federation of Greater Phoenix



BRING YOUR SCHOOL'S

- ✍ Mission and/or vision statement
- ✍ Annual budget
- ✍ Yardstick customized report (if applicable)
- ✍ Laptop computer (if possible)

HOW TO REGISTER

Register online at www.peje.org

The conference fee is \$400 for a team of two, \$525 for a team of three. Fee includes all snacks and meals (glatt kosher or cholov yisroel), materials, and a certificate of completion. Registration ends two weeks prior to start of conference.

Questions? Please contact Mark Blechner, Coordinator of Regional Conferences and Events, at mark@peje.org or 617-367-0001 ext 144.