



BERNARD ZELL ANSHE EMET DAY SCHOOL

בית ספר אנשי אמת ע"ש ברנרד זל



2018

FINANCIAL REPORT



FROM THE INTERIM HEAD OF SCHOOL AND BOARD CO-CHAIRS



Bernard Zell mascot, Eddie the Eagle, celebrates with our community at the groundbreaking ceremony for the new school campus.

If you have been on campus in the last few months you will see that Bernard Zell is moving forward with unbridled energy! The theme for the current school year is *Bonim Atid B'Yachad* or Building Our Future Together. Just a few months ago we began work on expanding our school facility, and we are thrilled that many of you were able to join us as we brought together the entire school

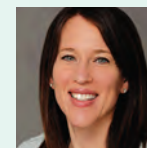
community—the Board of Trustees, students, faculty, staff, family members and neighbors—for a joyous groundbreaking ceremony.

This 25,000-square-foot expansion gives us room to grow our STEM instruction, arts education and athletics; host performances and special programs; and dedicate more space for exploring Jewish prayer, songs and community-building experiences. We are grateful to all of our donors who have made this progress possible. With the continued support of this community we will realize our dreams of transforming the campus of Bernard Zell with an educational facility that fulfills the vision of our faculty and leadership.

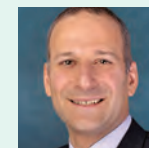
Bernard Zell continues to build on its strong history and provide the very best education for the next generation of Jewish leaders. As we move forward we also wanted to take the opportunity to look back and reflect on the prior fiscal year. We're pleased to share with you the Bernard Zell Financial Report, recapping the 2017-2018 school year and the tremendous impact of our donors. Once again we are honored to highlight the new programs, curriculum and capital improvements, which will enrich our students' experience today and into the future. These improvements are made possible by your support and we offer our sincerest thanks to you.



Dr. Alyson Horwitz
Interim Head of School



Debbi Cooper
Co-Chair,
Board of Trustees



Jim Hirshorn
Co-Chair,
Board of Trustees



DISCOVERY ACROSS CULTURES AND DISCIPLINES

Bernard Zell 8th graders are integrating art, history, reading, writing and technology in a unique and eye-opening year-long project. They collaborated with a high school in Poland to develop a graphic novel that describes the Warsaw Uprising from different perspectives. The *Resistance Project* tells the story of Mark Edelman, a resistance fighter in the Warsaw Ghetto Uprising and a heroic figure to both Jews and non-Jewish Poles, and that of a Polish poet and resistance figure, bridging their experiences and that of the students’.

The students are learning the art of the graphic novel from artist-in-residence Ken Krimstein, political cartoonist at The New Yorker magazine and author of *The Three Escapes of Hannah Arendt*. The students are also learning to apply digital storytelling skills, including augmented reality development, to the *Resistance Project*.

This innovative, creative and in-depth exploration of humanities will help students prepare for secondary studies and beyond, growing their research and literacy skills, as well as their cultural empathy and understanding.



8th-grade students learn and practice their digital storytelling skills and apply them to projects in their humanities classes.



In an integrated tech class, 8th-grade students are learning digital storytelling skills. To begin, students created a storyboard and produced a short video for their personal stories in writing class. Using the CoSpaces platform, students designed characters coded to speak, act and move; recorded a script in Hebrew and translated it in English captions; and connected scenes using coding. Students further developed their digital storytelling techniques using Unity, a cross-platform game engine, with which they added augmented reality to their *Resistance Project* in history class. Finally, students brought these skills together to create an interactive landscape about a novel from reading class for the OculusGo virtual reality headset.

These tech platforms inspire creativity and give students a new way to experience literature and, at the same time, build their digital literacy with the latest tools.



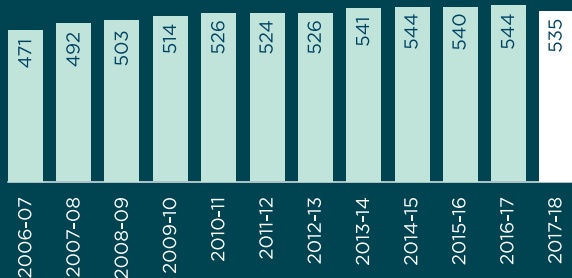
A RECORD-BREAKING YEAR FOR OUR STUDENTS

STUDENT ENROLLMENT

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535

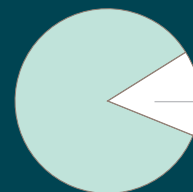
During the 2017-2018 school year, we opened our doors to 535 students.



Your support makes it possible for us to offer the best in academic and Jewish instruction to our entire student body.

TUITION ASSISTANCE

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22% OF STUDENTS
RECEIVED TUITION
ASSISTANCE

Tuition Assistance again broke records in 2017-2018. Our generous community enabled 22% of our students, 120 in total, to receive tuition assistance.

.....

“ I am overwhelmed by the generosity of this community. I actually have to hold back the tears. We are so grateful because honestly without you, and without the assistance, we would never be able to be here. It’s been such an amazing experience—not only for our daughter but for our family. ”

—Bernard Zell Parent



A YEAR TO REMEMBER

We are grateful to everyone whose generous support keeps Bernard Zell thriving, now and for future generations. Parents and grandparents, students and teachers, faculty and friends, we couldn't do it without you. We also give special thanks to the incredible volunteers who led our 2017-2018 Strategic Development Committee, Annual Campaign and Annual Fundraiser, and to those who step up every day to make our school stronger.

THIS IS WHAT WE ACHIEVED WITH YOUR SUPPORT

Interdisciplinary Learning Curriculum

Student Activities Coordinator

Enhanced School Security

Professional Development

Record-Setting Tuition Assistance



2017-2018 ANNUAL CAMPAIGN

.....

Meaningful donations helped our students soar even higher this year.

1,000  **1.2M**
DONORS DOLLARS

86%
SUPPORT FROM
BERNARD ZELL PARENTS

100%
SUPPORT FROM BERNARD ZELL
FACULTY AND STAFF

We thank our community as Annual Campaign and fundraising revenues continued to generate significant levels of support during the 2017-2018 school year. Nearly \$1.5 million was raised, covering nearly 8.5% of our operating budget of approximately \$17.5 million. After incorporating support from other revenue sources, expenses exceeded net revenue by a little over \$1 million. If we were to include capital contributions to fund the Campaign for Bernard Zell, the addition to net assets would total nearly \$7.8 million. The Bernard Zell Board of Trustees, Finance Committee, and Administration will continue to focus on sound financial management, especially in light of the capital project and the upcoming physical transformation of the school.

REVENUES

Tuition (net of Tuition Assistance of \$1,436,359) ..	\$ 10,706,894
Fees	2,059,780
Investment Income	111,304
Auxiliary Services	259,207
Total Revenue	\$ 13,137,185

OPERATING EXPENSES

Instructional Programs	
Personnel	\$ 10,056,516
Program Supplies & Services	658,448
Student Activities	719,274
Facilities	1,625,780
Food Service	717,530
Non-Operating Budget Expenses	355,770
Depreciation	481,148
Total Instructional Programs	\$ 14,614,466
Management & General (Includes \$145,633 of non-operating budget expenses)	2,935,457
Total Operating Expenses	\$ 17,549,923

EXCESS OF OPERATING EXPENSES OVER REVENUES BEFORE SUPPORT

SUPPORT

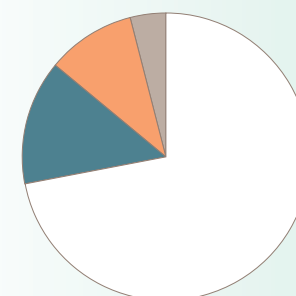
Annual Giving	\$ 1,270,574
Events	207,191
Contributions and Grants	1,266,015
Capital contributions	9,236,108
Endowment draw	741,846
Fundraising & Capital Campaign Expenses	(855,090)
Net Support	\$ 11,866,644

Unrealized Gain on Investments	\$ 318,715
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CHANGE IN NET ASSETS (including Capital Project activity)

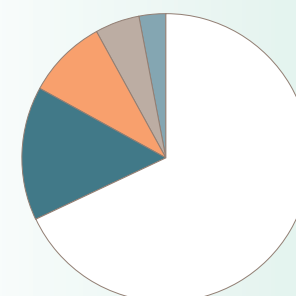
CHANGE IN NET ASSETS (excluding Capital Project activity)

REVENUES



- Tuition 82%
- Fees 16%
- Other Revenues 1%
- Investment Revenue 2%

OPERATING EXPENSES



- Instructional Program 67%
- Management & General 15%
- Facilities Operations 9%
- Food Service 4%
- Depreciation 3%



ABOVE & BEYOND: VOLUNTEERS 2017-2018

We offer the most sincere *todah rabah*—thank you—to all who volunteer on behalf of Bernard Zell. Every day you demonstrate true leadership. Your dedication makes Bernard Zell stronger and ensures a strong future for our children.

BOARD OF TRUSTEES

Officers

Andy Lucas, Chair
Michael Pierce '59,
Chair Emeritus
David “Scooter” Simon,
Co-Vice Chair
Mike Lufrano '79,
Co-Vice Chair
Dana Hirt, Secretary

Trustees

Craig Albert
Daniel Baskes
Debbi Cooper
Rosanne Diamond
Coby Derringer
Jodi Harris
Jim Hirshorn
Lori Komisar
Barry Malkin
David Mann
Michael Masters
Lonnie Nasatir
Michael Pucker
David Rosenbaum
Andrea Solow

Honorary Trustee

Richard Sager

STRATEGIC DEVELOPMENT COMMITTEE

Chairs

Craig Albert & Miriam Lichstein

ANNUAL CAMPAIGN LEADERSHIP

Annual Campaign Chairs

Danny Kaufman & Buffy Levy

Annual Campaign Vice-Chairs

Joey Breslow, Ami Striker &
Elana Tennenbaum

Chai Chairs

Lynne Levey and
David Schreibman

Chai Vice-Chairs

Marcy and Michael Zoller

Guardian Chairs

Mandy and Adam Fayne
Rebecca Weinstein Bacon and
Wade Bacon

Guardian Vice-Chairs

Laura and Matt Gray

Campaign Champions

Nicole Apple
Leor Auerbach
Jason Busch
Rebecca Cohen
Franci Feirstein
David Frank
Jason Friedman
Tali Griffin
Julie Kadish
Jennifer Lucas
Mike Lufrano
Seth Madorsky
Bethany McLean
Amy Menna
Justin Robins
Jason Tennenbaum

Endowment Growth Initiative Chairs

David Mann
Tamara Sokolec &
Alyssa Unikel

Endowment Committee

Liz Brodsky
Seth Madorsky
Andrea Muchin Leon

CAMPAIGN TO TRANSFORM BERNARD ZELL

Capital Campaign Chairs

Dana Hirt & Barry Malkin

Capital Campaign Committee

Tracy and Howard Ankin
Bethany McLean and
Sean Berkowitz
Liz and Steve Brodsky
Merritt and Adam DeWitt
Erin and Brett Estell
Rachel and Michael Geller
Olga Frankfurt and
Alexander Goldstein
Tamar Jacoby '94 and
Elan Jacoby
Rachel and Neil Klein
Jessica and David Ruttenberg
Danielle and Jay Sandler
Rebekah and Ilan Shalit
Judith and John Shear
Ericka and Matt Thacker
Lindsay and Aaron Yaffa

Capital Campaign Honorary Committee

Helen and Michael Arkes
Joan and William Brodsky
Barbara Levy Kipper
Ashley and Pam Netzky
Gigi Pritzker and
Michael Pucker
Helen and Sam Zell

PARENT TEACHER COUNCIL

PTC Executive Board 2017-2018

Jodi Harris, President
Lori Leib, Ex-Officio
Claudia Mendelson,
President Elect
Nancy Zinder, Treasurer
Laurie Baskin, Fundraising &
Retail Strategy
Allyson Becker,
Advancement Liaison
Erin Estell,
Community Engagement
Jen Zorn, Secretary
Tracy Ankin,
Grade Coordinator Chair
Judith Shear,
Grade Coordinator Chair

PTC Advisory Board

Ellen Zickmann
Miriam Lichstein
Tamara Sokolec
Julie Kadish

Book Fair

Tracy Ankin
Leslie Ballen
Michele Berman
Donna Goodhart

Booster Club

Jodi Cohen
Ariadna Lanski
Denise Schwartz

Challah

Allison Dan '86
Laura Lattin
Sheryl Necheles
Judith Shear

Chesed

Elissa Gitlow
Laura Lattin
Lisa Reznick
Merav Ruthman
Jeannine Vradenburg

Friends of JEFF

Keith Hayes
Alicia Levy
Sharon Shay
Marcy Zoller

Lunchroom

Mindy Kirsh
Samantha Mann
Jenni Meyers
Stephanie Shalit

PALS

Nicole Berger
Roz Guttentag
Genna Guttman
Naomi Lobatto

Parent Education

Amanda Hirsh
Samantha "Sissy" Kaplan
Debra Kissen Kohn
Hailey Chasson-Rebuck
Davida Wexler

Professional Parents Networking Group

Carolyn Aberman
Danny Cohen

Parking Lot

Wendy Diamond
Arla Silverstein

Pop-Up Shop

Tracy Ankin
Laura Lattin
Jenni Meyers
Ami Striker

Special Friends' Day

Joelle Bilow
Sara Fisher
Rebecca Graines
Annie Hesser
Jessica Ruttenberg
Lindsay Yaffa

Teacher Appreciation

Leor Auerbach
Joelle Bilow
Diana Chamlin
Tracie Harris
Tamar Jacoby
Sheri Kromelow
Marci Price

Yad B'Yad

Lyz Bodner
Allison Dan '86
Keith Hayes
Emily Hoffman
Tamar Jacoby
Laura Leff
Danielle Sandler

Young Family Winter Event

Jodi Gruber
Riffe Glick
Alicia Levy
Lena Milyavsky

ANNUAL FUNDRAISER 2018 – WHO'S STAYING FOR DINNER?

At the 2018 Annual Fundraiser Who's Staying for Dinner? nearly 400 guests joined us for an incredible evening of entertainment, food, community and fundraising that showcased the best of our school. The event raised more than \$248,000 of essential funding to enhance the educational experience at Bernard Zell.

Event Chairs

Merritt DeWitt &
Julie Zuckerman

Event Leadership Committee

Leor Auerbach
Allyson Becker
Joelle Bilow
Diana Chamlin
Jodi Gruber
Tamar Jacoby
Rachel Klein
Jaclyn Kramer
Sheri Kromelow
Hillary Schneider
Stephanie Shalit
Andrea Shashoua
Lindsay Yaffa



Merritt and Adam Dewitt,
Julie and Daniel Zuckerman



Alicia Levy, Jodi Gruber
and Debbi Cooper



Joan Lufrano, Michael Lufrano
and Ned Lufrano



Ericka Thacker, Rachel Klein,
Andrea and Abe Shashoua



BEGINNINGS

THE CAMPAIGN TO TRANSFORM BERNARD ZELL

For more than 70 years, Bernard Zell has developed generations of confident and compassionate young people who have helped shape a more vibrant community and world. But the world is changing, faster than the speed of life, and our educational facility must keep pace with the future of education.

The campaign to Transform Bernard Zell has raised over \$17.7 million to date to renovate and expand our current school building. The expansion efforts have begun, and we plan to open the doors of the new building in Fall 2019. This campaign is more than just an expansion of physical space, it is an investment and a commitment to the Jewish community of Chicago to develop future change-makers and trailblazers.

DISCOVER WHAT'S INSIDE OUR NEW BUILDING

1st Floor



- New, secure double door entrance dedicated to Bernard Zell use
- Head of School, Admissions, and the school office will be easily accessible to students, parents, and visitors
- *Makom Rina*—a space for tefillah, holidays and milestones, and community gatherings
- 2 new outdoor play spaces, community area, outdoor teaching circle and outdoor plaza
- Director of Security and central command office
- Nurse's office will be relocated to the first floor for easier access
- Community gathering space and coffee station

2nd Floor



- Center for the Performing Arts includes:
 - 2 new music classrooms to be used for band and choir
 - A retractable wall to transform into one continuous space for performances
- New learning spaces designed based on how 21st Century students learn
- Gallery and display spaces for student documentation and art installations
- Abundant, varied space for small group learning, one-on-one enrichment and individual study
- Center for Inquiry and Imagination includes:
 - 2 new science labs
 - Innovation Hub
 - Virtual Reality Zone
 - Expanded Robotics and Lego League Labs



BEGINNINGS

THE CAMPAIGN TO TRANSFORM BERNARD ZELL

4th Floor



- Double story, full size gymnasium
- Gymnasium will allow for additional PE time, athletic practices, and speakers
- The gym will transform into a cutting-edge performance space with capacity to seat 700
- State-of-the-art AV capabilities to enhance events and productions
- Bernard Zell will now be able to host community-wide programs and special events

CAPITAL CAMPAIGN COMMITTEE

The passionate members of the Capital Campaign Committee are charged with educating and inspiring others about why this campaign and the new building are so important for Bernard Zell and the greater Chicago Jewish community. The committee members do this by incorporating Capital Campaign informational tables, flyers, and activities into existing school-wide events as well as hosting small parlor meetings outside of school. The committee members meet monthly to discuss the progress of the campaign and new strategies to help our school reach its goal so that students, faculty and staff can have the most innovative facility to educate the next generation of Jewish leaders.

In January of this year, steel beams were erected for our new 4 story building.



Clara Malkin and Jessica Malkin with mascot Eddie the Eagle at the groundbreaking ceremony this past September.



Students wore festive plastic hard hats as shovels dug in for Bernard Zell's new beginning at the groundbreaking ceremony.



THANK YOU FOR YOUR SUPPORT

We are deeply grateful to our community for their philanthropic support of Bernard Zell.

GIFTS BY CASH, CHECK OR CREDIT CARD

A gift of cash is available immediately for the school's use and is fully deductible from your federal income taxes. Please make checks payable to Bernard Zell Anshe Emet Day School. Pledges made are payable through June 30 of a given school year. A gift also may be made by credit card to the annual campaign.

ONLINE DONATIONS

A gift to the annual campaign may be made online at www.bernardzell.org/donate.

GIFTS OF SECURITIES

By giving appreciated securities that you have held for one year or more, you avoid a capital gains tax and receive a deduction at full market value on the date of the stock transfer to the school. Please contact the Development Office or visit us online for more information.

MATCHING GIFTS

Donors may be able to maximize their annual gift by leveraging their corporate matching programs. Please contact the Development Office to assist you with the process.

PLANNED GIVING

Planned gifts such as bequests, real estate, stocks, life insurance or other assets are not only very generous, but also have potential benefits for a donor as a component of thoughtful estate planning. Create a legacy by making a meaningful contribution, and also maximizing tax and other financial benefits. Learn more at www.bernardzell.org/planned-giving.

CAMPAIGN TO TRANSFORM BERNARD ZELL

To make a pledge or gift to The Capital Campaign, please contact the Development Office.

TRIBUTES

Tribute cards offer a thoughtful way to honor a *simcha*—a bar/bat mitzvah, birthday, anniversary, or graduation—or to send condolences to those who have lost a loved one. Please contact the Development Office or visit us online at www.bernardzell.org/tribute to purchase special 70th anniversary tribute cards.

For more information, please contact:
Rachael Fenton, Director of Development
773.572.1260, rfenton@bernardzell.org

Visit us at www.bernardzell.org/giving.