



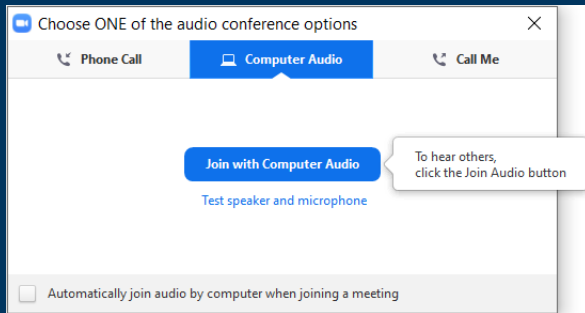
Creating a Crisis Relief Fund for Independent Schools

Essential Considerations and Examples from EAB Partner Schools

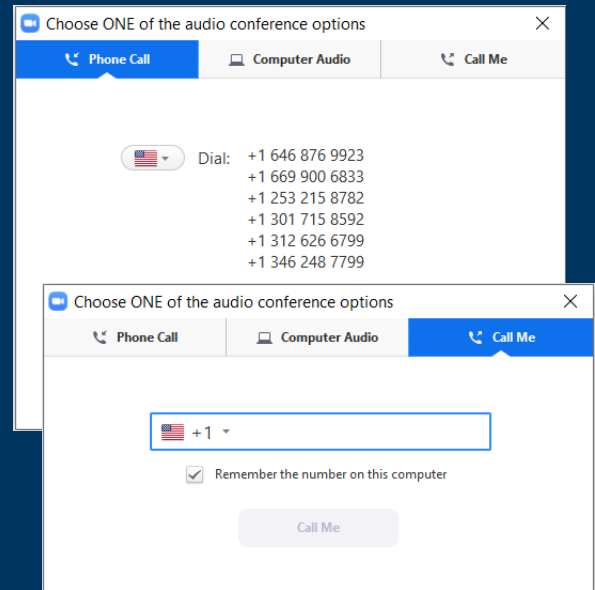
May 22, 2020

Audio Options in Zoom

1 Use your computer's audio and microphone through Zoom

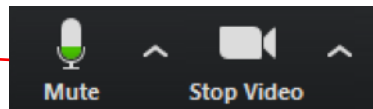


2 Dial in using your phone

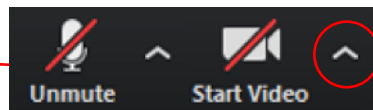


X Do not do both – it will cause feedback

Audio Mute/UnMute & Video Stop/Start



You are live.
Everyone can hear you.
Everyone can see you



You are not live.
You are muted.
Your video is turned off.

Clicking the Up arrow next to the Mic and Camera icon at any time during the meeting will provide you with audio and video options.

A Few Helpful Hints



1. Always remember to mute your mic when you're not speaking. This reduces background noise and feedback.
2. Turn off non-essential software that may be using the internet while you are in a Zoom meeting.
3. Be aware of your location's bandwidth. Too many devices connected to your Wifi can slow Zoom. Consider disconnecting smart phones, tablets, etc. while in the Zoom meeting
4. If your internet connection becomes unstable, disable your webcam (stop video) and enable only when you need to speak.
5. No apologies necessary for the appearance of 'co-workers' or when life otherwise interrupts.

Access EAB's Support Resources Now

COVID-19 Resource Center

EAB's latest take on the coronavirus crisis and what it means for higher education

Home | Executive Summary | Action Steps | Download a Brochure

EAB's Latest Take

What alumni engagement during the COVID-19 pandemic
The COVID-19 pandemic has caused many questions to alumni relations teams. How can we continue to engage alumni and what does offering support mean for our existing programs? Learn how to be more formal!

What the CARES Act means for higher education advancement leaders
Following the passage of the CARES Act, Congress has passed and signed into law. Clearly, the act will cause change in education. EAB experts are ready to help you understand current conditions under the act and provide resources on fundraising and other fund-raising resources.

How to engage donors during COVID-19: re-engage your fundraising team first
ASAC has been receiving lots of questions about gift officers and donors during the COVID-19 pandemic.

Our [resource center](#) provides expert advice on:

- [What the Coronavirus Means for College Advancement](#)
- [Making the Most of Your Advancement Outreach Efforts Amid COVID-19](#)

Independent School Alumni Engagement

Independent School Alumni Engagement

The relationship between school and student shouldn't end after graduation, but alumni are increasingly unresponsive to traditional engagement efforts. EAB can help heads of school elevate alumni relationships to their full potential.

185+ research calls with independent school leaders across the last year

Our [expert insight](#) provides strategies for elevating alumni relationships, including:

- Ways you can [engage young alumni donors](#)
- Understanding the [New Rules of Engagement](#) with alumni
- An audit to help gauge [how easy it is to give to your school](#).

Examples from EAB Partner Schools

MICDS RAM RELIEF FUND

MICDS
Ram Relief Fund

Thank you for considering a gift!

The Ram Relief Fund was established to ensure the financial sustainability of MICDS by providing flexible financial support for unforeseen needs and expenses caused by the COVID-19 pandemic. These needs and expenses include, but are not limited to, tuition relief for all current MICDS families as well as additional relief for families who have additional demonstrated financial need. Spending from the Ram Relief Fund will be at the discretion of the Head of School and the Chief Financial Officer.

In response to an outpouring of offers for help from alumni, [MICDS](#) created the [Ram Relief Fund](#) to provide financial assistance to school families who are and, will be affected by COVID-19. While it began with alumni, donating will also be available to the entire community.

The process is made easy through the use of an [online form](#).

Crisis Funds Provide Immediate Relief



Ways to Stem Attrition and Help School Community During a Crisis

Benefits of Relief Funds



Provide One-Time Assistance for Currently Enrolled Full-Pay Families Experiencing a Hardship



Protect Enrollment and Financial Sustainability



Enhance Stability for All Students by Protecting Classroom Experience



Communicate to Families that the School Values Them and Their Role in the Community

EAB's Crisis Relief Funds Pulse Survey Overview



Schools Are Using Funds to Stem Immediate Needs, Developing Procedures

- ✓ **Nearly half of EAB partners report having a crisis relief fund**
- ✓ **Most schools are formally soliciting for donations**
- ✓ **Most contributions to the funds come from current families, alumni, and faculty/staff**
- ✓ **Most funds are available only for current families**
- ✓ **Most schools are restricting the funds to tuition assistance, both current year and 20-21**
- ✓ **Almost all schools are using an application**
- ✓ **Almost all schools have Financial Aid Director involved in evaluating eligibility for assistance**

- 1 How Will Schools Communicate About the Fund?
- 2 How Will Donors Contribute to the Fund?
- 3 Which Staff Will Be Involved?
- 4 What Will the Fund Be Used For?
- 5 Who Will Qualify for this Aid?
- 6 How Should Community Members Request Aid?
- 7 How Much Aid Will the School Offer?
- 8 How Will the School Provide the Aid?
- 9 How Long Will the School Offer Aid??

How Will Schools Communicate About the Fund?



Emphasize Purpose and Mission to Build Community, Elicit Donations



Purpose and Process

- ✓ Why the funds are a priority
- ✓ How families can apply to receive support
- ✓ How the aid will be administered

Q: What is the Ram Relief Fund and what does it cover? ▲

A: The Ram Relief Fund was established to ensure the financial sustainability of MICDS by providing flexible financial support for unforeseen needs and expenses caused by the COVID-19 pandemic. These needs and expenses include, but are not limited to, tuition relief for all current MICDS families as well as additional relief for families who have additional demonstrated financial need. Spending from the Ram Relief Fund will be at the discretion of the Head of School and the Chief Financial Officer.

How Will Schools Communicate About the Fund?



Emphasize Purpose and Mission to Build Community, Elicit Donations



Mission and Meaning

- ✓ Connect the establishment of the funds to the school's mission
- ✓ Tap into the generosity of the community



Dear One GDS Supporters,

I write today with a matter of considerable urgency. Even as I have been moved deeply by the strength and resilience of the GDS community, each day brings me equal awareness that many members of our community are facing immediate hardships and loss due to the impact of COVID-19. Some are being forced to question whether they will have the financial resources necessary for their children to remain a part of GDS. In consequence, we expect the need for financial aid to increase significantly—for existing recipients, as well as for those requiring support for the first time. As an institution committed to equity and inclusion, with a deep belief that we are enriched and strengthened by each and every member of this community, we are compelled to respond and support our community through this crisis.

In order to meet this additional need, the Board of Trustees established the [One GDS Community Crisis Fund](#), which will support our families who have suffered economically as a result of COVID-19, by providing additional financial aid resources.

Additionally, a portion of the funds raised for the One GDS Community Crisis Fund will be set aside for use at the Head of School's discretion, to allow for maximum flexibility in addressing other needs that may arise for faculty, staff, and other members of the community as a result of this pandemic.

Finally, the One GDS Community Crisis Fund will allow us to provide equitable access to upgraded and expanded technology to ensure all of our students, faculty, and staff have the tools they need to stay connected and to work successfully and efficiently in this new environment. We will also support increased funding for professional development as our school's faculty avidly seek to master the challenges of teaching remotely and develop curriculum and programming best suited for distance learning.

How Will Donors Contribute to the Fund?

Make it Easy to Donate to Maximize Available Assistance



Simplify Donation Process

- ✓ Create a **donation feature on the school's homepage**, separate from other giving opportunities
- ✓ Make digital donation process **easy** for members of the school community
- ✓ **Communicate how to donate specifically to the fund**, as many have expressed interest in providing financial assistance



BFS Tuition Assistance Emergency Relief Fund

The **Tuition Assistance Emergency Relief Fund** has been established to bridge the temporary hardships facing some of our families and continue to support their ability to remain at the school during this difficult time. The funds will be administered by the Financial Aid Coordinator, Vanessa Reynolds in partnership with Head of School, Crissy Cáceres and will maintain the highest confidentiality. If your family is in need of assistance, please contact Financial Aid Coordinator, Vanessa Reynolds at vreynolds@brooklynfriends.org.

If you prefer to make a pledge, please choose the "Make a Pledge" button at the bottom of this page. Pledges to the BFS Tuition Assistance Emergency Relief Fund must be paid by June 30, 2020.

If you are making a pledge payment to the BFS Cares Emergency Fund, please note it in the "Name as you would like it to appear in the Annual Report" field. Thank you!

Donation

\$1,000

\$500

\$250

\$100

\$50

Other

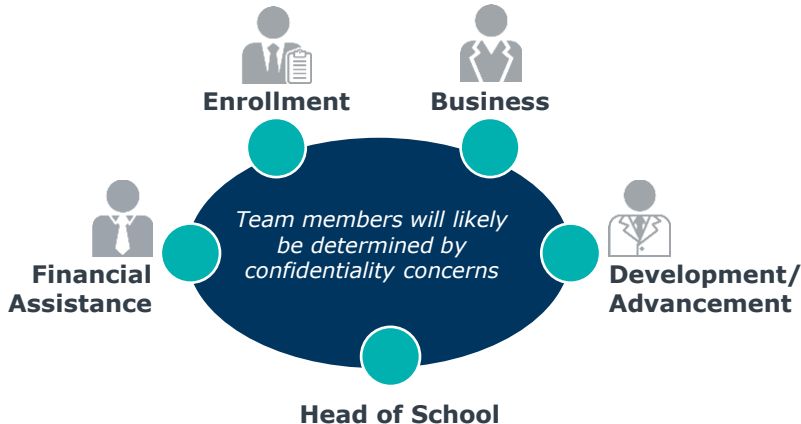


Which Staff Will Be Involved?

Specify School Staff Responsible for Administering the Fund

Cross-Functional Teams Oversee Donations & Allocations, Achieving Multiple Goals

Sample Personnel Serving on Crisis Relief Fund Committee



Grace Church School set up a **relief fund committee** that includes the Head of School, Admissions Directors, the Director of Financial Aid, the CFO, a senior accountant in business office who is a native Spanish speaker, and the Assistant to the Head of School who is also the Advisor to Families of Diverse Cultural Backgrounds and Advisor to Students of Color.





What Will the Fund Be Used For?

If Assistance Is Not Just for Tuition, Specify the Acceptable Uses



Specify Intended Use of Funds

First determine and clearly communicate how awarded assistance is intended to be used



Explore All Potential Uses of Funds

Some schools provide tuition assistance only, while **others allow the funds to be used for living essentials** like rent, groceries, and medical bills



Consider Using Multiple Funds

Some schools **have more than one fund to address a variety of basic needs** separately



Independent School Example of Funds Use



Through the [BFS Cares Emergency Fund](#), Brooklyn Friends School provides assistance for families struggling to meet daily needs.



Who Will Qualify for this Aid?

Determine Community Members Eligible for Assistance

Potential Recipients of Aid



School Faculty



School Staff



Currently Enrolled Families



Factors to Keep in Mind

Remember the Financial Impact of COVID-19 Is Felt Broadly Across School Communities

Consider Amount of Available Aid When Determining Who Is Eligible

Clearly Communicate Those Who Qualify for Assistance




How Should Community Members Request Aid?

Process Should Reflect Urgency, Type of Aid, and Accountability

Examples from EAB Partner Schools

- An email request for funds up to \$500
- Verification for families/staff asking for help with rent
- Verification for families/staff asking for help with medical bills
- School and Student Services application (SSS)
- SSS plus summary of how circumstances have changed
- A school-created application explaining how circumstances have changed



Request for Temporary Emergency Tuition Relief (COVID-19)
2020-2021 School Year

Temporary Emergency Tuition Relief is available to families who are experiencing financial stress due to the COVID-19 pandemic. To initiate a request for assistance please complete this Tuition Relief Request Form and email it to [kathy.fagid](mailto:kathy.fagid@micds.edu) before May 1, 2020. After this submission, family's will be asked to provide additional documentation necessary to substantiate the level of tuition relief needed.

List your MICDS Students

Name	Grade in 2020-21
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

List your other children who are in tuition charging schools or child care centers

Name	Grade in 2020-21	School	Tuition
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Employment Information

	Parent A	Parent B
Parent Name	<input type="text"/>	<input type="text"/>





How Much Aid Will the School Offer?

Develop a Consistent Approach for Calculating Different Types of Assistance

Schools Take Various Approaches Based on Type of Aid

Groceries



Most schools **limit awards by dollar amount**

Consider using **guidance from USDA** on food plans per family. One school reported using the Liberal Plan, as the minimum assistance amount they would offer.

Rent



Grace Church School uses local rental listings to **gauge average housing costs by zip code** as a check against the what families are reporting. The school decided to set a consistent cap per month.

Tuition Assistance



While most schools report this will **depend on total need across the school**, one school has determined that award amounts will be between $\frac{1}{4}$ to $\frac{1}{2}$ the cost of tuition for each child.

Funding Formulas Create Consistency and Transparency

Factors to Consider When Determining Your School's Funding Formula

- ✓ Estimated net worth
- ✓ W-2 earner versus business owner
- ✓ Expected reduction in revenue
- ✓ Furlough/termination of one parent
- ✓ Furlough/termination of two parents
- ✓ No employment change but reduced pay



How Will the School Provide the Aid?

Determine the Most Efficient Way to Dispense Aid

Schools Use Mechanisms Based on Type of Aid



After initially arranging for grocery deliveries, one school decided it was more efficient to use **American Express e-cards** which incurred no penalty



For families and staff asking for help with rent, the **payment goes straight to the landlord**



For medical bills, **payments will go directly to providers** via online payment



How Long Will the School Offer Aid?

Determine How Long the Crisis Fund Will Be Available

Three Ways to Structure the Availability of the Fund



Time-Bound



Limited by Funds Availability



Unspecified



Several schools are setting a deadline of 30 days from when they begin accepting applications.



Depending on the duration of the crisis, some schools will consider extending their emergency funds into 2021-2022.

Questions to Consider Moving Forward

Think About Next Year, Community Needs, Financial Sustainability

- 
- 1** *How do funds affect mission – is there tension between school mission of access and making tuition affordable?*
 - 2** *Be reflective about process – as in institutional risk management, EAB recommends formally looking back at what worked, what could be better.*
 - 3** *Understand how well funds help community - survey community about relief fund, ask donors when in conversations.*
 - 4** *Consider best way to set financial aid policy – should schools consider incremental aid?*

Support your school through the coronavirus crisis

1. Bookmark these pages for the latest official information about the coronavirus.
2. Use EAB research and resources to support your school's response to coronavirus.
3. Reference peer policies and other guidance when developing response plans.
4. Use these peer examples to help communicate coronavirus information.

2. Use EAB research and resources to support your school's response to coronavirus

Most of these resources were not created specifically for infectious disease outbreak responses. That said, many of our existing resources can complement, supplement, and inform a variety of crisis response, planning, and mitigation efforts. Explore the three topic areas below.

NEW Support student success during instructional disruption

Provide transparent and timely communication.

Regional and global information hubs, relevant EAB research and resources, responses from major education associations help partners stay up to date and make informed decisions.

Support your school through the coronavirus crisis

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2. Use EAB research and resources to support your school's response to coronavirus.
3. Reference peer policies and other guidance when developing response plans.
4. Use these peer examples to help communicate coronavirus information.
5. Read the coronavirus responses from the major education associations.
6. Find Department of Education resources by state.

4. Use these peer examples to help communicate coronavirus information

Websites

Independent Schools	School Districts
<ul style="list-style-type: none">- NEW Castilleja School- Lakeside School- NEW National Cathedral School- NEW The College Preparatory School- The Episcopal Academy	<ul style="list-style-type: none">- Cypress Fairbanks Independent School District- NEW Halton School District Board- NEW Paulding County School District- Renton School District- San Jose Unified School District- West Windsor-Plainsboro Regional School District

Direct Communication

Independent Schools	School Districts
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District specific examples of comprehensive websites, direct communication, and social media messaging help partners navigate varied communication needs.



To Learn More:

eab.com/K12covid19response

Upcoming EAB Events for ISEF Partners



Look for Notifications about Pulse Surveys and Monthly Virtual Roundtables, Including:



Enrollment and Financial Aid

- Monthly reporting from “pulse surveys” monitoring melt and yield
- Q+A with EAB’s Financial Aid Optimization experts
- Peer discussions on retention efforts
- Building the pipeline in a virtual recruitment world



Advancement

- Peer collaborative to discuss and workshop fundraising strategy for 20-21
 - June 18
 - July 22
 - August 18



Peer Cohort CFOs

- Cohorts based on school enrollment convening monthly
- Cost containment
- Investment opportunities
- Modeling future scenarios