

Enrollment Trends in Florida Jewish Schools 2007-08 to 2022-23

A Report by the Teach Coalition Office of Jewish Education
Policy and Research and Step Up for Students

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Enrollment Trends 2007-08 to 2022-23

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Teach Coalition Office of Jewish Education Policy and Research

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KEY FINDINGS

Florida Jewish Day Schools are Growing.

- Florida's Jewish schools grew 58% from 2007-08 to 2022-23 and now enroll 13,279 K-12 students – the fourth largest enrollment in the country after New York, New Jersey, and California.

Even Non-Orthodox Jewish Schools are Growing.

- Since 2017-18, Florida's Non-Orthodox Jewish schools have seen unprecedented growth (+21%).
 - This bucks a nationwide, decades-long trend of declining Non-Orthodox enrollment.
 - The growth in Florida Non-Orthodox schools stems from improving retention rates, especially in high school grades.
 - This coincides with the growing number of students receiving state scholarships.

Orthodox Jewish Schools are Attracting Students from Other States.

- From 2021-22 to 2022-23, Orthodox Jewish schools grew tremendously (+30% in two years) reflecting a combination of:
 - Pandemic-induced migration to Florida (especially from New York); and
 - The attraction of Florida's generous state-sponsored scholarship programs, which in 2022-23 provided 60% of Jewish school students an average scholarship of \$8,090.

Growth of State-Sponsored Scholarships is a Key Factor.

- Between 2011-12 and 2022-23, the percentage of students on scholarship has grown from:
 - 3% ⇒ 23% in Non-Orthodox schools
 - 13% ⇒ 52% in Orthodox Coed schools
 - 44% ⇒ 86% in Orthodox Single-Gender schools

Jewish Schools are Near Maximum Capacity.

- Since 2014-15, an average of 3.75 new Jewish schools have opened every year to keep up with growing enrollment.
- However, the vast majority of new schools have stayed small with under 175 students.
 - One likely culprit is the challenge of finding suitable school campuses to grow into.
 - This is due to a combination of rising property prices, restrictive local zoning laws and regulations, increased competition for space from non-Jewish nonpublic schools, and the substantial startup capital requirements to build a new school building.
- Without action, the lack of school building space may throttle growth in Florida's Jewish day schools.

1. EXECUTIVE SUMMARY.

Florida's Jewish schools are growing at a rapid, historic, and accelerating clip. The widespread and now universal availability of Florida's school choice scholarships are a major factor, as is a major influx of Jewish families from New York in the wake of the pandemic.

Florida is now a major center of Jewish education in the United States. In 2022-23, Florida had the fourth largest Jewish school population in the nation with 13,379 K-12 students – after New York (168,835 students), New Jersey (63,650 students), and California (14,378 students).

This comes after a long stretch of growth. Between 2007-08 and 2022-23, **Florida's Jewish schools grew by 4,887 students (+58%)**. Over the same period, the number of Jewish schools grew by 34 (+85%). Most of the new schools opened up after 2016-17 and have stayed relatively small, with under 250 students.

1.1. Enrollment Growth Picked Up Over Time.

- From **2007-08 to 2011-12**, enrollment initially declined from 8,492 to 8,080 students (**-1.2% annually**).
- From **2012-13 to 2016-17**, it steadily recovered, growing to 9,134 (**+2.4% annually**).
- From **2017-18 to 2020-21**, growth sped up and enrollment reached 10,754 (**+4.1% annually**).
- From **2021-22 to 2022-23**, growth skyrocketed and enrollment reached 13,379 (**+11.5% annually**).

1.2. Growth by Jewish Category.

Yeshivish schools (defined as Orthodox, gender-segregated schools) grew consistently and quickly, from 2,065 students in 2007-08 to 5,670 students in 2022-23 (+175%).

Modern Orthodox schools (defined as Orthodox coeducational schools) initially declined, but then recovered starting in 2010-11, and grew extremely fast after 2020-21. Over the entire period, Modern Orthodox schools grew from 2,526 students in 2007-08 to 4,171 students in 2022-23 (+65%).

Non-Orthodox schools also declined initially, from 3,901 students in 2007-08 to 2,931 students in 2016-17 (-25%). However, **starting in 2017-18, Non-Orthodox enrollment began to recover**. From 2017-18 to 2022-23, enrollment in Florida's Non-Orthodox schools increased from 2,931 students to 3,538 students (+21%).

1.3. Small Jewish Schools are Struggling to Find Larger Schools Buildings.

Excluding very small Jewish schools that never enrolled at least 20 K-12 students, there were 27 small Jewish schools (with <250 students) in 2007-08. Over the next 15 years, an additional 29 new Jewish schools opened.

Yet of these **56 new or existing small Jewish schools, only 5 grew into medium (250-499 students) or large (500+ students) Jewish schools**. This is despite the fact that most parents seem to prefer larger schools for their children – 74% of the enrollment growth since 2007-08 was in the largest Jewish schools.

What is throttling the growth of small Jewish schools?

The most likely answer is that **it's very hard to find a suitable school building** in South Florida where the Jewish day school community is most concentrated. This appears to stem from a combination of:

- **Rising Property Prices** – According to Redfin, from 2019 to 2024, median home prices increased by \$182,500 in Broward County, by \$250,000 in Miami-Dade, and by \$230,000 in Palm Beach.
- **Regulations and Zoning Restrictions** – State and local governments heavily restrict where schools can be opened and impose safety regulations that require expensive retrofits for converted buildings.
- **Rising Demand for School Buildings** – It is not just Jewish schools competing for buildings. In 2011, South Florida had 581 nonpublic schools; by 2022, this number grew to 937 nonpublic schools.
- **Prohibitive Capital Costs** – We estimate that buying land and building a school for 400 students in South Florida would cost over \$10,000,000. Such a project is beyond the means of most small schools.

With Florida's existing Jewish schools at or near full capacity, more effort is needed to source suitably sized school buildings for Florida's burgeoning Jewish school system.

1.4. State-Supported Scholarships Are Driving Student Retention in Non-Orthodox Schools.

American's Non-Orthodox schools have seen declining enrollment for decades. Every national Census of Jewish Day Schools conducted by the AVI CHAI foundation found fewer students enrolled in Non-Orthodox Jewish day schools – from 36,897 in 1998-99 to 30,765 in 2018-19 (-17%).

We looked at 13 states where nine-out-of-ten Jewish day school students reside. In **10 of these states, Non-Orthodox Jewish school enrollment declined** since 2016-17. In two of these states – Georgia and Wisconsin – Non-Orthodox schools grew by 4-6%. Yet, **since 2016-17, Florida's Non-Orthodox schools grew by 21%**.

The growth in Non-Orthodox schools since 2016-17 is driven by **declining losses from attrition** – in other words, fewer and fewer students are exiting the Non-Orthodox Jewish school system mid-career. From 2007-08 to 2016-17, an average of 459 students left Non-Orthodox schools each year (especially students entering 6th and 9th grades). From 2017-18 to 2022-23, however, annual average losses from attrition declined to 228 students per year. **The change is especially evident in Non-Orthodox high schools** – in 2007-08, only 26% of 8th graders continued to High School in Non-Orthodox Jewish schools; by 2022, a full 73% were staying for high school.

Why is Florida bucking a nationwide, decades-long trend?

It's not because of COVID-19; enrollment in Florida's Non-Orthodox schools has been in recovery since 2016.

One important piece of the puzzle appears to be **the growth of Florida's state-supported scholarship programs**. In 2016-17 – the year Teach Coalition's Teach Florida affiliate was founded – the legislature began a seven-year process of expanding eligibility for the state's scholarships programs.

As the number of students receiving scholarships increased, Non-Orthodox schools' losses from attrition declined.

Attrition and Scholarship Trends in Non-Orthodox Schools				
	2007-08 - 2011-12	2012-13 - 2016-17	2017-18 - 2020-21	2021-22 - 2022-23
Attrition	-15.8%	-11.5%	-8.3%	-5.9%
Students on Scholarship	0%	4%	12%	23%
Average Size of Scholarship	-	\$5,494	\$7,694	\$8,150

This isn't the entire story. More research is needed to understand why Non-Orthodox high schools in particular have seen a dramatic turnaround in retention rates.

But the close correlation between improved retention and rising state scholarship funding in Non-Orthodox schools is highly suggestive.

1.5. State-Supported Scholarship are Driving Jewish Day School Family Migration to Florida.

From 2007-08 to 2011-12, enrollment in Florida's Modern Orthodox (Orthodox Coed) schools declined by about -1% per year. From 2012-13 to 2020-21, enrollment grew at a steady clip, by about +3% per year. These modest gains are consistent with the trends of Modern Orthodox schools in other states.

Then, **starting in 2021-22 enrollment growth skyrocketed to +15% per year** – that's an additional 1,000 students over two years. No other state even comes close to this level of growth (Georgia had a higher growth rate at +26%, but given lower starting enrollment that reflects just 200 additional students over two years).

A similar – though less pronounced – trend was also evident in Yeshivish (Orthodox Single-Gender) schools.

Most of the upswing in growth was not in Kindergarten (which would reflect natural population growth) but in grades 1-12. This suggests that **Jewish day school families have been migrating to Florida in large numbers** since 2020-21. Indeed, in the wake of the COVID-19 pandemic, 664,921 people emigrated from New York, which has the most Jewish day school students of any state. The most popular destination? Florida.

Yet, **other states receiving large numbers of New Yorkers did not see Modern Orthodox enrollment swell**. New Jersey received 166,524 New Yorkers since 2020; California received 63,978 New Yorkers. Both states saw muted or negative Modern Orthodox enrollment growth in 2021-22 and 2022-23.

It appears that **when most people leave New York**, they choose from a **variety of destinations**. But **when Jewish day school families leave New York**, they are **overwhelmingly choosing Florida**.

What's so great about Florida from a Jewish day school family's perspective?

The **\$7,800 state-supported scholarships awarded to over half of Modern Orthodox students** in 2021-22 and 2022-23 appears to be an important factor.

Even as the COVID-19 pandemic recedes and **inter-state migration returns to pre-pandemic levels**, Florida **may continue to attract Jewish day school families** from across the nation. In the 2023-2024 school year, **Florida expanded its scholarship program to universal eligibility** – now any nonpublic school student in the state can receive a scholarship worth nearly \$8,000. **Time will tell** whether this powerful inducement continues attracting Jewish families from other states to Florida in large numbers.

2. DATA AND METHODS.

2.1 Data Sources.

The enrollment data in this study were drawn primarily from data provided by the Florida Department of Education (FL DOE). Every year the FL DOE collects enrollment data from all nonpublic schools and publishes them on the Office of Independent Education and Parental Choice webpage. FL DOE's data on nonpublic schools includes enrollment from Pre-Kindergarten (four-year-olds) through Twelfth Grade.

We included only grade levels Kindergarten through 12th grade in our study. Since there are many standalone early childhood centers with large number of preschool students who ultimately never enroll in a Jewish primary school, including preschool could confound our analyses.

We created a database in Microsoft Excel into which we entered each school's grade-level enrollment numbers and address for each year. This database contains 779 rows, with each row reflecting one school year's worth of enrollment data.

In some cases, Jewish schools known to be open in a given year were missing from FL DOE data. Where possible, we supplemented FL DOE data on these schools from enrollment data voluntarily reported to the Private School Universe Survey (PSS), which is conducted bi-annually by the U.S. Census Bureau's National Center for Education Statistics. Twenty rows worth of enrollment data in our database were sources from PSS.

When data for a school was missing for a single year but we had enrollment data for that school in the prior and subsequent years, then we imputed the enrollment in the missing year. For grades 1-11, we averaged the enrollment in the prior year's next-lowest grade and the subsequent year's next highest grade to impute the missing values. For Kindergarten, we averaged the prior year and subsequent year's Kindergarten enrollment. For 12th grade, we used the prior year's 11th grade enrollment number. Eighteen rows worth of enrollment data in our database were imputed.

State-supported scholarship data for 2011-12 to 2022-23 was provided by Step Up for Students, which operates the largest Scholarship Granting Organization in Florida. They have the most comprehensive source of data as to the number of scholarships and funding amounts awarded to each school. We could not access the following scholarship data because Step Up does not have them:

- Scholarship data for the **McKay scholarship program** for all years until it transitioned into the Family Empowerment Scholarship program in 2022-23.
- Scholarship data for any scholarships awarded by **other scholarship organizations**, including the AAA foundation. In general Step Up for Students processes over 98% of the state-supported scholarship awards in the state, so this omission is likely insignificant.

Scholarship data was correlated with schools' enrollment data using the FL DOE's unique identification number for each nonpublic school.

Once school's enrollment and scholarship data was entered into our database, we then categorized schools by Jewish/Non-Jewish and by Jewish sub-affiliation.

2.2 Categorizing Schools.

In Florida's annual enrollment survey, schools self-identify their religious affiliation. We used schools' self-identified affiliation to categorize schools as Jewish or non-Jewish.

Then we manually reviewed the full list of all Jewish schools to sub-categorize them as one of:

Non-Orthodox – Schools not dedicated to inculcating values of strict adherence to Talmudic halachic norms, and knowledge of these norms. These schools include community day schools serving both Orthodox and non-Orthodox student populations, as well as Solomon Schechter and Reform schools.

Other Orthodox - Coed – Schools inculcating Talmudic halachic norms that enroll both boys and girls. This category generally includes schools in the “Modern Orthodox” sector.

Other Orthodox - Single Gender – Schools dedicated to inculcating Talmudic halachic norms that enroll either only boys or only girls. This category generally includes the “Yeshivish” sector and, to a lesser extent, the Modern Orthodox sector.

We chose these categories based on the results of the AVI CHAI Foundation’s Census for Jewish day schools.¹ AVI CHAI had found major divergences between trends in Orthodox day schools (which saw a 77% enrollment increase from 1998-99 to 2018-19) and Non-Orthodox schools (which saw a 17% enrollment decrease from 1998 to 2018) leading us to continue to break out these categories for our study as well.

Within the Orthodox school community, we further broke out the “Orthodox” category into Orthodox – Single Gender and Orthodox – Coed. This is because the AVI CHAI foundation saw divergent enrollment outcomes even across these boundaries – Yeshivish schools saw enrollment growth of 59%, and enrollment in Centrist Orthodox and Modern Orthodox schools hardly budged.

To obtain these three sub-categories, we used the school-reported data from the 2018-19 Census of Jewish Day Schools provided by members of the team who produced that report. For the remaining schools not listed in the 2018-19 AVI CHAI data – mostly schools that had either closed before 2018-19 or opened afterwards – we had to identify these schools’ overall categorization based on Internet research. Schools with websites could generally be easily found on Google and categorized based on their site literature.

2.3 Defining Attrition.

Attrition represents the ability to retain current students – or even attract new ones from other schools. Schools with negative attrition are losing students every year to other schools, other states, or homeschooling, while schools with positive attrition are gaining students from other schools each year.

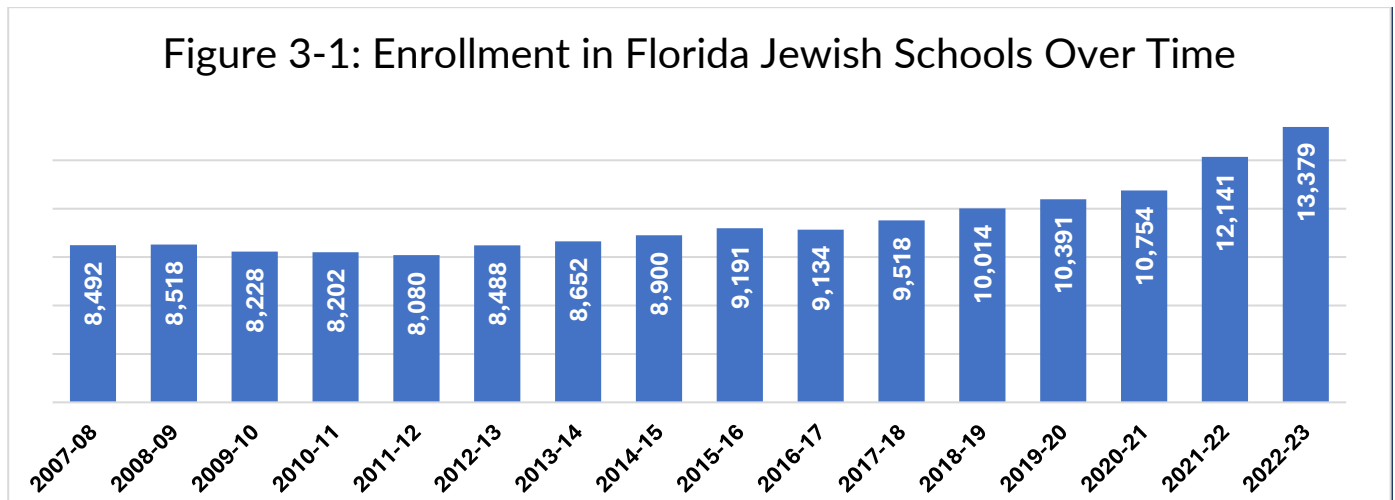
Attrition Example: 9 th Grade Cohort, Over 4 Years					
Year	9 th Grade	10 th Grade	11 th Grade	12 th Grade	Attrition = Cohort Size Change on Previous Year
2005-06	13	12	14	17	
2006-07	25	15	13	11	15 - 13 = +2
2007-08	18	24	14	14	14 - 15 = -1
2008-09	20	17	24	12	12 - 14 = -2

For the purposes of this study, attrition is defined as a change – positive or negative – in the size of a student cohort over time.² In a school with zero attrition, a First Grade class of 20 in 2007-08 will result in a Second Grade class of 20 in 2008-09, a Third Grade class of 20 in 2009-10, and so on. By contrast, a school with consistent negative attrition rate would have a Kindergarten class of 20 in 2007-08, a First Grade class of 18 in 2008-09, a Second Grade class of 16 in 2009-10, and so on.

¹ Every five years between 1998-99 and 2018-19, the AVI CHAI Foundation conducted a census of Jewish day schools, the most recent of which is available on the AVI CHAI Foundation website: https://avichai.org/knowledge_base/a-census-of-jewish-day-schools-2018-2019-2020/

3. ENROLLMENT TRENDS.

K-12 enrollment in Florida Jewish schools steadily declined from 2007-08 to 2011-12 by an average of -103 students (-1.2%) per year.



From 2012-13 to 2016-17, enrollment began to grow by an average of 211 students (+2.4%) per year.

Enrollment growth picked up substantially from 2017-18 to 2020-21, growing by an average of 405 students (+4.2%) per year.

From 2021-22 and onward, Jewish enrollment grew remarkably fast, increasing by an average of 1,313 students (+11.5%) per year.

Table 3-1: Jewish School Enrollment by Grade in Florida, 2007-08 to 2022-23

Year	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Change
2007-08	921	929	860	845	845	801	658	615	602	388	359	362	307	8,492	-
2008-09	967	891	887	853	814	798	685	628	576	392	357	327	344	8,518	0.31%
2009-10	862	898	824	847	788	765	640	649	592	388	359	320	296	8,228	-3.40%
2010-11	857	818	871	783	816	755	674	631	617	364	359	353	305	8,202	-0.32%
2011-12	879	841	777	835	759	769	629	606	571	399	336	349	330	8,080	-1.49%
2012-13	882	876	831	799	809	758	700	609	605	495	421	353	350	8,488	5.05%
2013-14	919	898	863	824	780	784	671	695	618	428	466	388	318	8,652	1.93%
2014-15	908	945	931	858	824	766	700	665	667	434	418	436	349	8,900	2.87%
2015-16	951	934	974	940	848	781	666	703	639	508	440	384	423	9,191	3.27%
2016-17	933	931	875	928	902	822	689	623	666	491	499	413	362	9,134	-0.62%
2017-18	984	963	921	880	919	911	744	699	624	537	492	448	396	9,518	4.20%
2018-19	1,010	1,009	944	927	917	936	828	756	692	533	540	480	442	10,014	5.21%
2019-20	1,055	973	1,001	947	909	914	824	847	736	632	552	554	447	10,391	3.92%
2020-21	1,089	1,077	980	1,000	945	908	808	829	823	652	627	534	482	10,754	3.49%
2021-22	1,272	1,258	1,195	1,072	1,115	1,011	920	860	881	777	654	643	483	12,141	12.90%
2022-23	1,349	1,301	1,278	1,256	1,125	1,186	990	990	880	913	833	695	583	13,379	10.20%

3.1 Regional Variations.

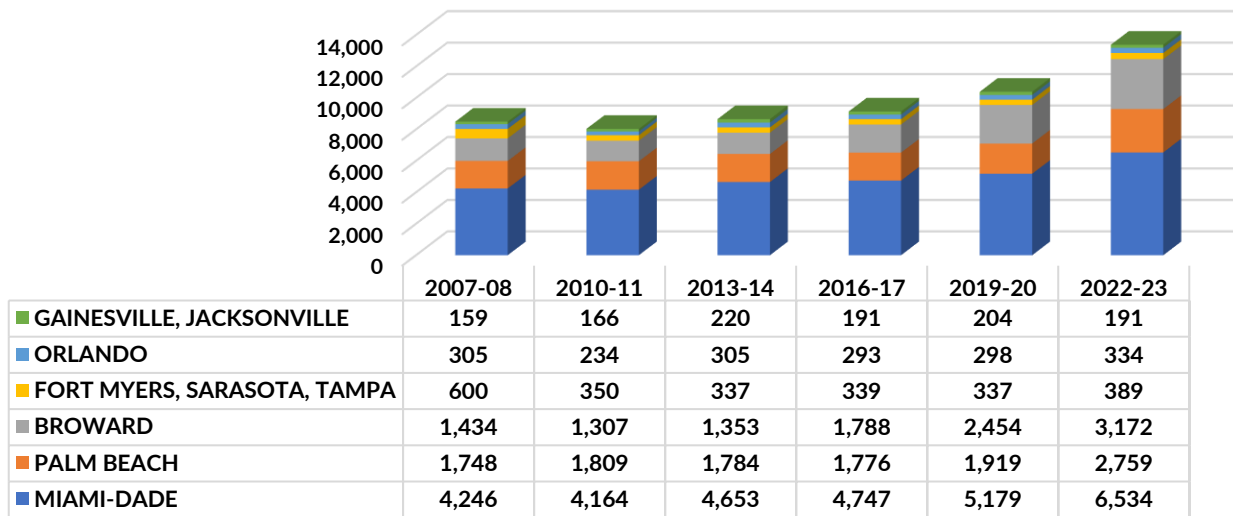
Overall enrollment in Jewish schools increased by 67.8% in the fifteen years from 2007-08 to 2022-23.

The bulk of statewide growth in enrollment since 2011-12 occurred in South Florida (including Miami-Dade, Broward, and Palm Beach counties). Within South Florida, Jewish school enrollment in Broward County grew at the fastest rate (+121%), followed by Palm Beach County (+58%) and Miami-Dade County (+54%).

Northern Florida Jewish schools (including the Gainesville and Jacksonville areas) also grew significantly – by 20% from 2007-08 to 2022-23 – albeit from a much lower starting enrollment number.

In that same period, Central Florida Jewish schools saw slower enrollment growth, increasing by a moderate 10%, while Gulf Coast Jewish schools (including the Fort Myers, Sarasota, and Tampa areas) saw a significant decrease in enrollment, with a drop of -35%. The sudden drop in enrollment in the Gulf Coast between 2007-08 and 2010-11 appears to be due to the closure of the Pinellas County Jewish Day School in 2010-11.

Figure 3-2: Jewish Enrollment by Region



Throughout this period, the proportion of students in Miami-Dade County stayed relatively constant around 50%. Likewise, the proportion of students in Palm Beach County also stayed relatively constant around 21%.

The proportion of Jewish students in Broward County increased from 17% in 2007-08 to 24% in 2022-23.

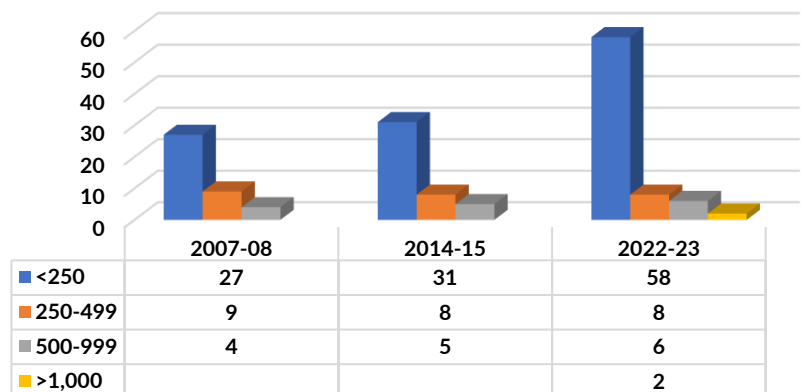
Meanwhile, the proportion of students outside Southern Florida declined from 13% in 2007-08 to 6% in 2022-23.

3.2 Schools by Size.

From 2007-08 to 2022-23, the number of Jewish schools enrolling K-12 students increased from 40 to 74. That means a net of 34 new schools opened over this period, an average of 2.3 additional Jewish schools every year.

The opening of new schools was not a constant phenomenon, however. From 2007-08 to 2014-15, the combined number of Medium size (250-499 students) and Large schools (500-999 students) stayed constant

Figure 3-3: Number of Schools, by Size



at 13, while a net of 4 new Small schools (<250 students) opened.

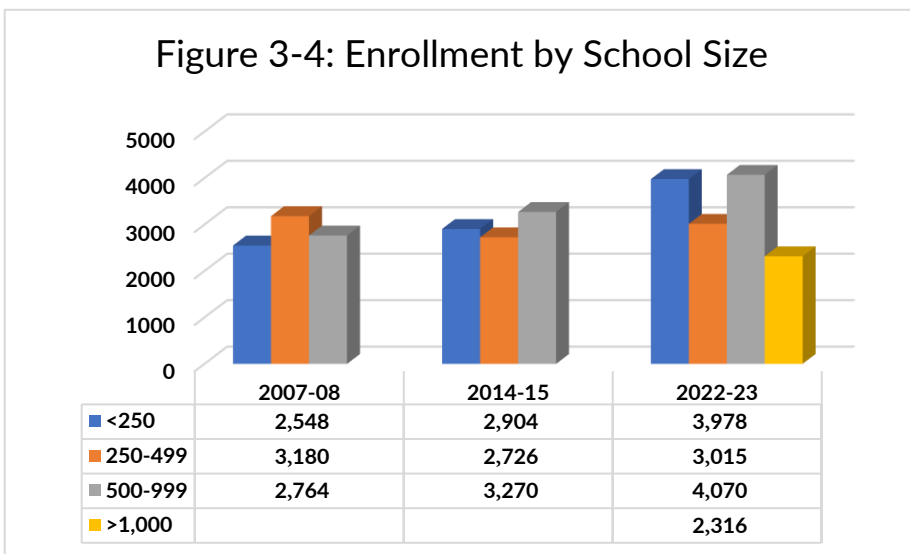
Then, from 2015-16 to 2022-23 the number of small schools nearly doubled from 31 to 58. Meanwhile, the number of large schools (>500 students) increased from 5 to 6, and two large schools ascended into the largest school category (>1,000 students). By 2022-23, the number of medium and large schools had increased to 16.

Most of these new schools stayed relatively small – 27 of the new Jewish schools that opened still had less than 250 students in 2022-23.

This trend is mirrored in overall enrollment numbers. From 2007-08 to 2014-15, the number of Jewish students enrolled in small-size schools increased modestly from 2,548 to 2,904 (+14%). Then, from 2015-16 to 2022-23 the number of Jewish students in small-size schools grew from 2,904 to 3,978 (+37%).

The largest schools saw the greatest enrollment gains. From 2007-08 to 2014-15, the number of students in schools with over 500 students grew modestly from 2,764 to 3,270 (+18%). Then, from 2015-16 to 2022-23 the number of Jewish students in larger schools grew from 3,270 to 6,387 (+95%), nearly doubling.

Throughout this period, the number of students in medium-size schools hovered steady around 3,000.



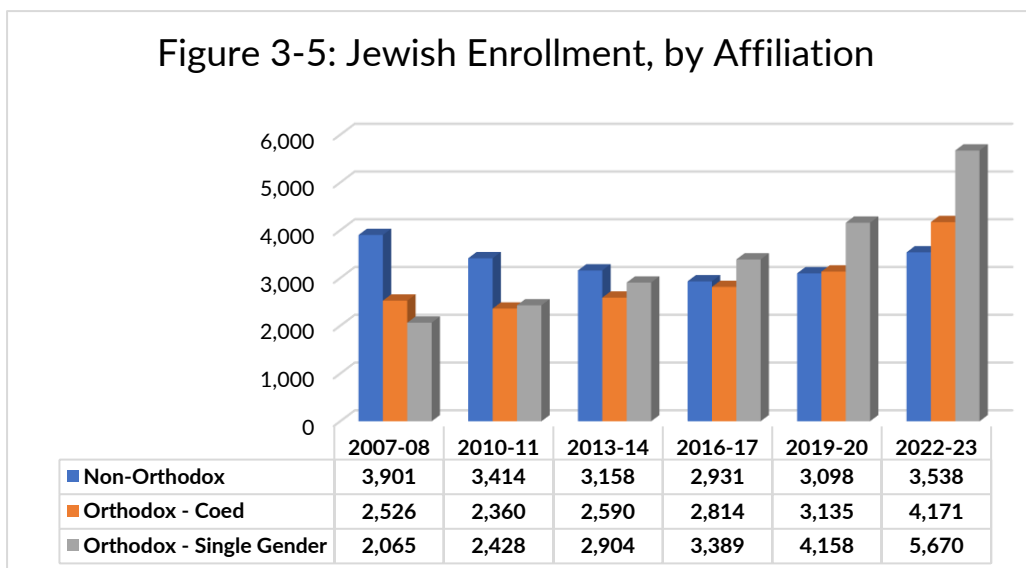
3.3 Breakdown by Affiliation.

Enrollment in Orthodox schools trended upwards over the past fifteen years. Enrollment in Non-Orthodox enrollment trended downwards from 2007-08 to 2016-17, but has been steadily recovering between 2016-17 and 2022-23.

Single-Gender Orthodox Schools serve as our proxy for “right wing” Yeshivish schools. These schools experienced **explosive growth** (+3,605 students; +175%) more than doubling in size, primarily in Boca Raton, Hollywood, and Miami.

Coed Orthodox Schools serve as our proxy for “Centrist Orthodox” or “Modern Orthodox” schools. These schools also experienced **dramatic growth** (+1,645 students; +65%) over the past 15 years, with growth primarily in Boca Raton, Hollywood, and Miami.

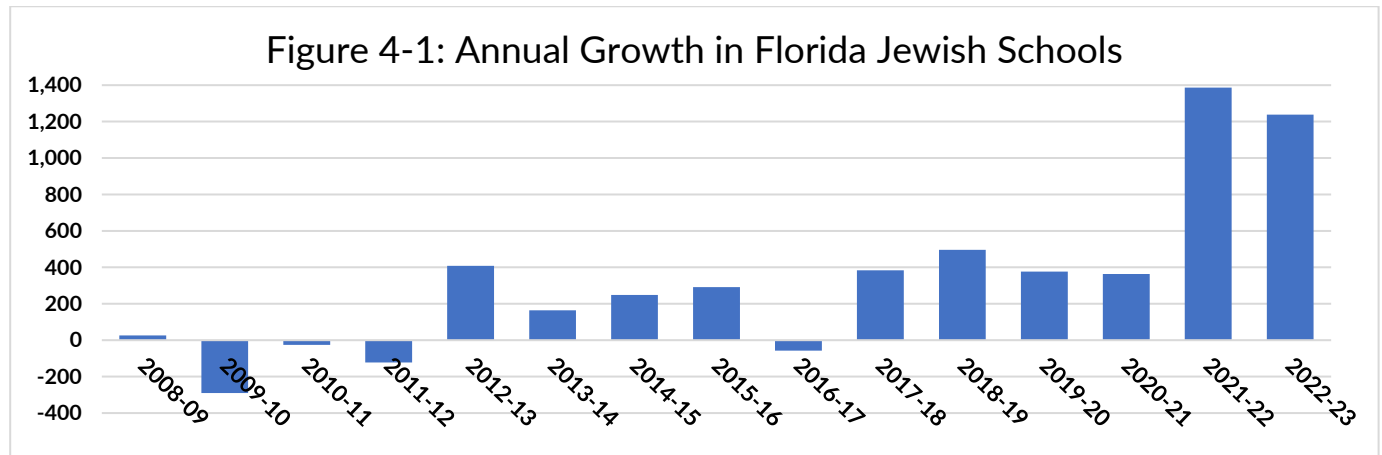
Non-Orthodox Schools saw a **moderate decrease** (-363 students; -9%) in enrollment from 2007-08 to 2022-23. This decrease occurred in all areas except for Broward, which experienced a significant increase in enrollment, though not enough to increase overall growth. As noted above, enrollment in Non-Orthodox schools reached its nadir in 2016-17 at 75% of its peak and has recovered since then to 91% of its peak.



4. DIGGING DEEPER: THE DRIVERS BEHIND DECLINE AND GROWTH.

From 2007-08 to 2022-23, Florida Jewish schools grew by an average of +3.2% per year. But the rate of growth changed over time. Per Figure 4-1, from 2007-08 to 2011-12, growth was negative, averaging -1.2% per year.

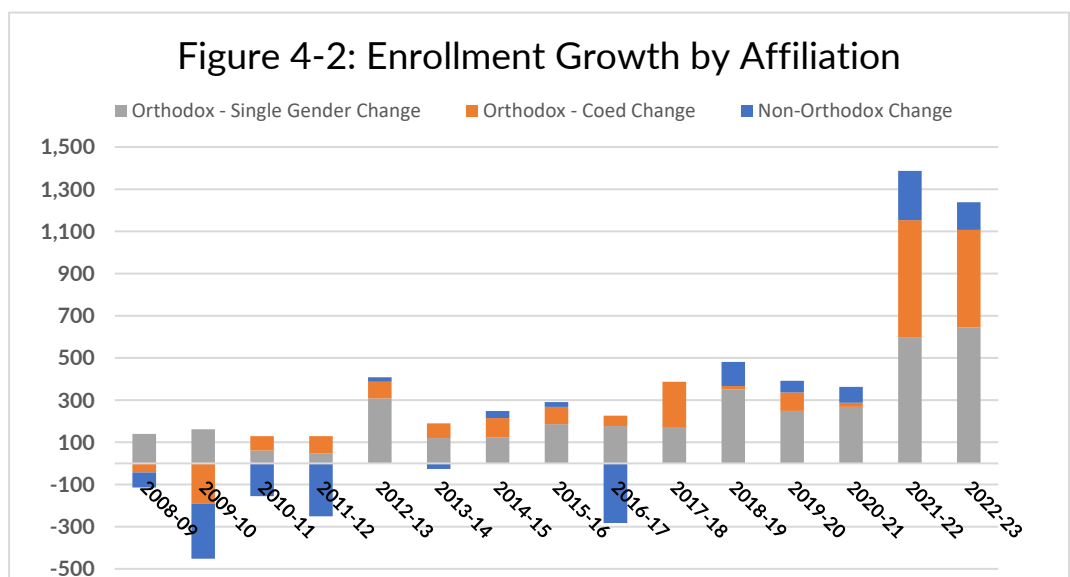
From 2012-13 to 2016-17, enrollment growth turned positive, averaging +2.4%. Enrollment growth picked up substantially from 2017-18 to 2020-21, averaging +4.2% per year. And growth was supercharged from 2021-22 to 2022-23, increasing to an average of +11.5% per year.



4.1 Growth by Affiliation.

Given the substantial divergence between Orthodox and non-Orthodox schools in Figure 3-5 above, we break out enrollment growth by affiliation in Figure 4-2 below.

This shows that Non-Orthodox enrollment growth was negative until 2011-12, was stable from 2012-13 to 2015-16, deeply negative in 2016-17, and then began recovering slightly until 2020-21. Then, from 2021-22 and onward, Non-Orthodox schools saw their largest growth rates on record. Orthodox Coed schools declined slightly until 2009-10, began growing steadily from 2010-11 through 2020-21, and jumped tremendously from 2021-22 onward.



Orthodox Single Gender schools grew rather consistently from 2008-09 to 2020-21, with growth accelerating over time. Then – as in other Florida Jewish schools – there was a very large growth spike from 2021-22 onward.

Table 4-1: Average Enrollment Change by Affiliation

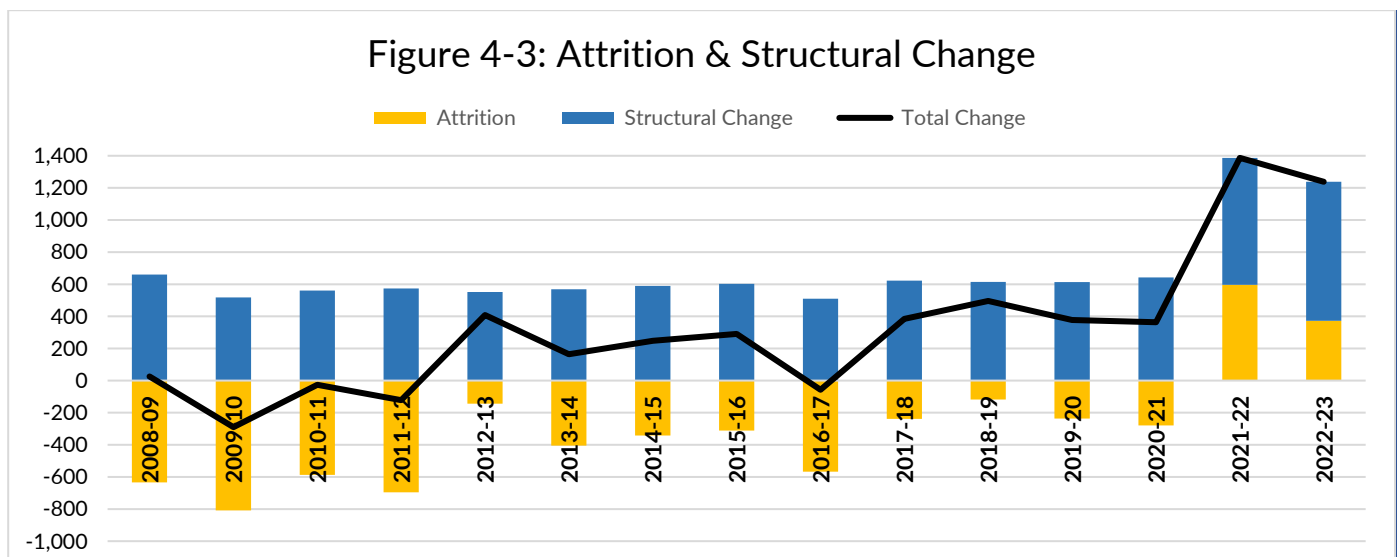
Time Period	Non-Orthodox	Orthodox - Coed	Orthodox - Single Gender	Overall
2007-08 - 2011-12	-5.0%	-0.9%	4.5%	-1.2%
2012-13 - 2016-17	-1.5%	2.9%	6.3%	2.4%
2017-18 - 2020-21	2.0%	2.8%	6.9%	4.1%
2021-22 - 2022-23	5.5%	14.8%	13.2%	11.5%

4.2 Attrition vs. Structural Change.

Conceptually, growth in a school or school system is the product of two factors:

1. **Structural Change**, whereby more students are entering the lowest grade than are graduating from the highest grade. Structural change can be negative, if the graduating class is larger than the Kindergarten (or lowest grade) class; such a state of affairs is disastrous for a school or school system.
2. **Attrition**, whereby students disappear from the system when they go up a grade. Attrition can be positive, if more students are switching into the system (for example, from public schools or non-Jewish private schools) than leaving it.

Under this conceptual model, when the number of students entering Florida Jewish schools in Kindergarten exceeds the number of students graduating and leaving the school mid-career, then the result is enrollment growth. In other words, when gains from Structural Change exceed losses from Attrition then you have growth, and vice versa.



Looking at year-on-year enrollment changes for each grade cohort, we see in Figure 4-3 that structural change was relatively constant around 600 students per year from 2008-09 to 2020-21.

During this period, growth was driven primarily by fluctuations in attrition. When attrition were under 400 students per year from 2012-13 to 2015-16, and under 300 students from 2017-18 to 2020-21, we had two long periods of growth. The major spike in attrition losses in 2016-17 punctuated these combined eight years of growth.

However, the biggest shift is seen in 2021-22 and 2022-23 when attrition reversed and went positive – suggesting that at a substantial number of students were switching into the Florida Jewish school system (e.g. to public schools or out of state Jewish schools).

Unsurprisingly, as seen below in Table 4-2 these trends vary by affiliation. Gains from structural change in Non-Orthodox schools fluctuated slightly during this period but remained near the long-term average of 10.5%. By contrast, losses from attrition consistently dropped over time; by the end, attrition losses were at two thirds the level in 2007-08 to 2011-12.

Orthodox Coed schools had nearly zeroed out losses from attrition by 2011-12, becoming slightly positive through 2020-21. Gains from structural change also grew over time from 2007-08 to 2020-21. Then, in 2021-22 and 2022-23 gains from structural change doubled to +4.0% per year and attrition became a tremendous driver for growth at +10.8% per year. This unprecedented shift suggests a major surge in both Kindergarten and mid-grade enrollment in Orthodox Coed schools.

Table 4-2: Average Annual Attrition and Structural Change, by Time Period and Affiliation

		2007-08 – 2011-12	2012-13 – 2016-17	2017-18 – 2020-21	2021-22 – 2022-23
Non-Orthodox	Attrition	-15.8%	-11.5%	-8.3%	-5.7%
	Structural Change	10.8%	10.0%	10.3%	11.2%
Orthodox - Coed	Attrition	-1.8%	0.9%	0.7%	10.8%
	Structural Change	0.9%	2.0%	2.1%	4.0%
Orthodox - Single Gender	Attrition	-2.5%	-0.4%	0.2%	6.4%
	Structural Change	7.0%	6.7%	6.7%	6.8%
Overall	Attrition	-8.1%	-4.1%	-2.3%	4.2%
	Structural Change	6.9%	6.5%	6.4%	7.2%

Note: Green arrows indicate a change of greater than 1.0%. Yellow arrows indicate a change of less than 1.0%.

4.3 Structural Change and Birth Rates.

One interesting takeaway from Table 4-2 is that rates of structural change are remarkably stable the entire time period from 2007-08 to 2022-23.²

This suggests that Americans Jewish family sizes are relatively stable over time. This is supported by the 2013 and 2020 Pew studies on Jewish Americans which found that the number of Jewish children per Jewish household is relatively unchanged since 2012. While the studies found a modest increase in the number of children in Orthodox households – from 1.7 children per household in 2013 to 2.0 children per household in 2020 – it appears that the overall fertility rate for Orthodox families is stable.³

Table 4-3: Jewish Americans, Children Per Household and Fertility

	2012	2020
Children Per Jewish Household	0.5	0.6
Children Per Orthodox Household	1.7	2.0
Orthodox Fertility Rate	3.3	3.3
<i>Data Source</i>	<i>Pew, 2012⁴</i>	<i>Pew, 2020⁵</i>

It is unclear whether the COVID-19 pandemic impacted Jewish fertility rates the same way it led to a precipitous decline in the general population’s fertility rates in most countries. The next Pew study on Jewish Americans will be instructive in this regard.

What is clear is that most of the gain in Florida Jewish school enrollment is the result of shifting attrition rates, not growing family sizes.

² The only group with a noticeable increase in the rate of structural changes is Orthodox Coed Jewish schools, which saw annual structural change increase from 2.1% in the four year period ending 2020-21 to 4.1% from 2021-22 and onward. Moreover, this two percentage point increase can be explained by Orthodox Coed day school families with Kindergarten-age children migrating to Florida (see Section 5.3 below).

³ Although given that the 2013 and 2020 Pew studies used a different methodology to calculate fertility rate, this point is not itself conclusive.

⁴ [A Portrait of Jewish Americans, 2012, Chapter 2: Intermarriage and Other Demographics](#), Household Size table.

⁵ [Jewish Americans in 2020, Chapter 10. Jewish Demographics](#). See Jewish Households in U.S. table.

5. ANALYSIS.

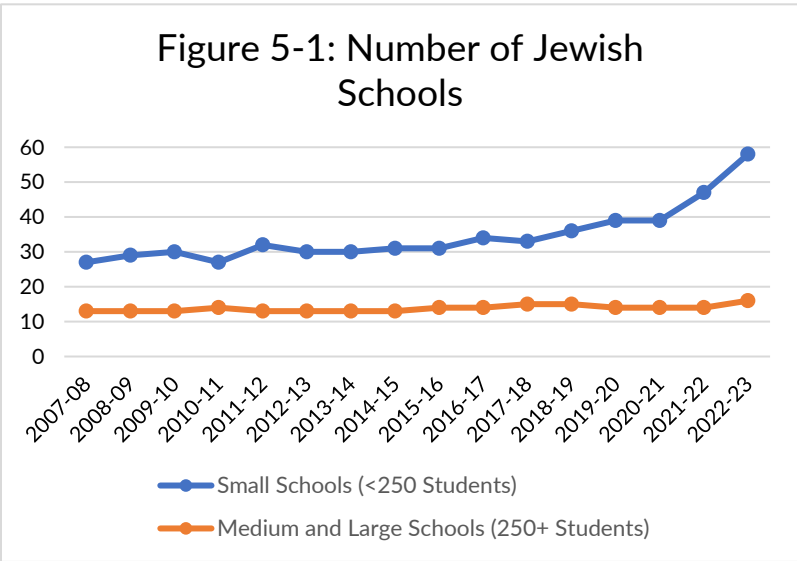
5.1 Explaining the Proliferation of Small Jewish Schools.

Since 2007-08, the number of Jewish schools in Florida has expanded from 40 to 74, with most of the new schools appearing after 2014-15.

Additionally, most of the new schools were relatively small, with fewer than 250 students. Since 2007-08, the number of schools with less than 250 students more than doubled from 27 to 58.

By contrast, the number Medium and Large schools has barely budged. Since 2007-08, the number of schools with 250 or more students increased from 13 to 16.

Why has the number of Medium and Large schools grown by just 23% while the number of Small schools has increased by 115%? In other words, why haven't more of the newer schools grown into the larger school categories?

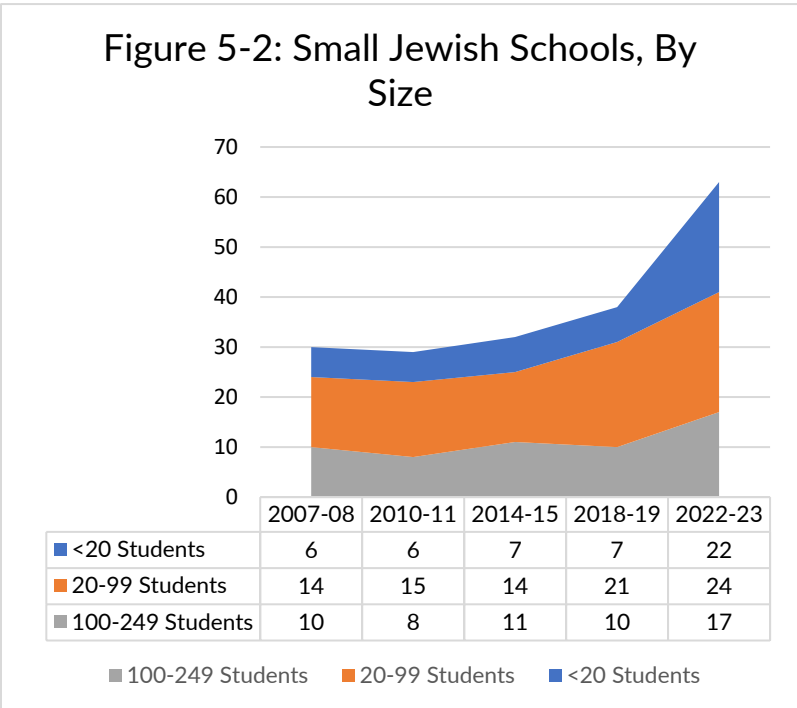


5.1.1 How Big Are the Small Schools?

Not all small schools are alike. Many of the schools in the “Small School” category are quite small indeed.

If we further break out the Small Jewish schools by size, we see that 16 of the net 31 new Small schools that opened since 2007-08 are tiny – with fewer than 20 students. Some include the Kindergartens attached to synagogue preschool programs, which appear or disappear in our data depending on whether Kindergarteners enrolled in a given year.

However, even after excluding these very small schools from our considerations, we still see a substantial increase in the number of schools with 20 - 99 students (+10 schools, +71%) and 100 - 249 students (+7 schools, +70%). The question remains why more of these new schools haven't grown into the next size category.



5.1.2 How Much Did Small Schools Grow Over Time?

Until now we have dealt with the net change in the numbers of schools.

But what about the growth trajectory of Small schools between 2007-08 and 2022-23? Did schools tend to shrink, grow, or plateau?

Figure 5-3 shows the growth trajectory of all schools with fewer than 250 students in 2007-08. Based on the discussion in Section 5.1.1, Figure 5-3 excludes very small schools with enrollment that never hit the 20-student threshold.

As the table below shows, in 2007-08 there were 27 Small schools evenly distributed among five size subcategories; the largest 5 of these schools had between 175 and 249 students.

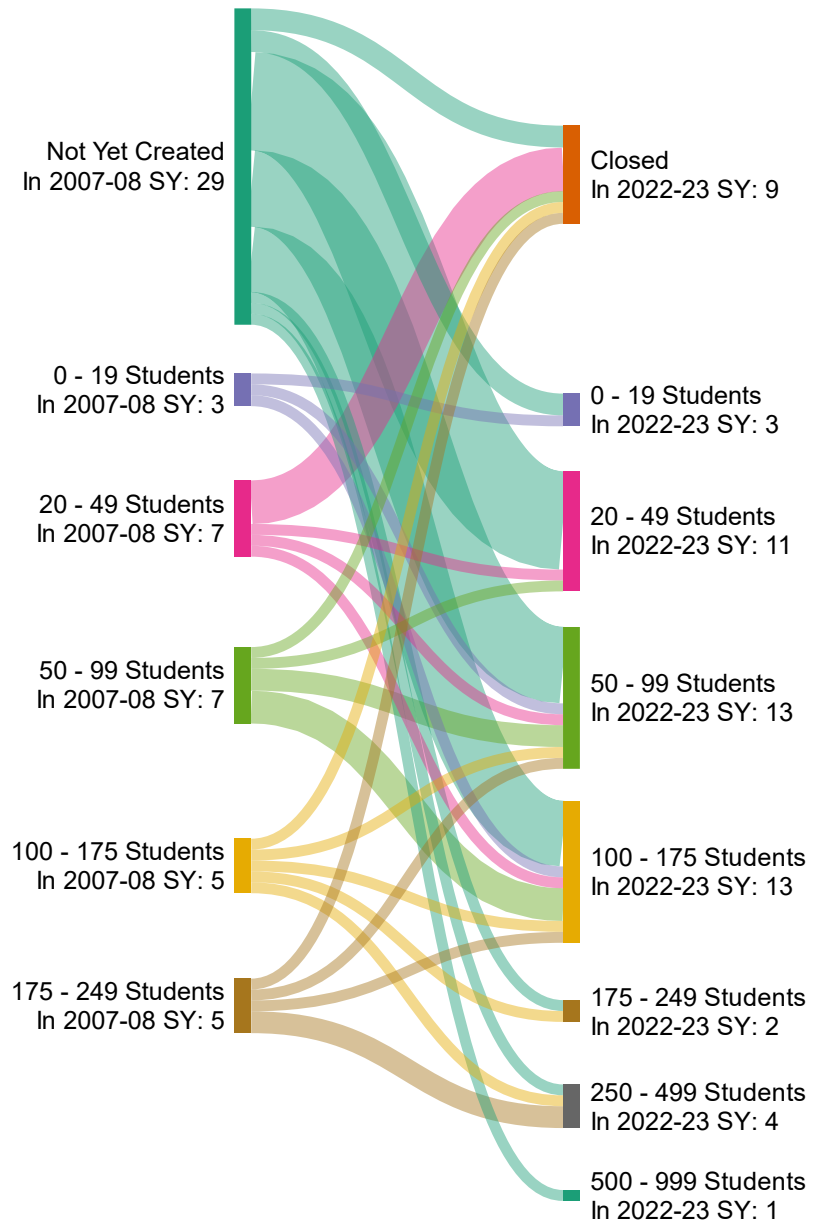
Over the next fifteen years, 11 of the initial 27 schools downshifted their size subcategory or closed, 11 upshifted their size category (two growing into Medium size schools), and 5 remained in the same size subcategory.

A further 29 schools were created at some point after 2007-08. 2 closed, 1 grew into a large school (with over 500 students) by 2022-23, 1 grew into a Medium school (in the 250-499 students), 1 grew into a school in the 175-249 students subcategory, and the remaining 24 had fewer than 175 students.

By 2022-23, 47 schools remained open. At this point, 7 of the initially small or not-yet-opened schools now had more than 175 students – just 2 more than fifteen years prior. This despite an overall surge in enrollment Jewish school enrollment over this period.

Why does it seem that very few schools break through the 175-student number?

Figure 5-3: Growth Trajectory of Small Jewish Schools Over Time



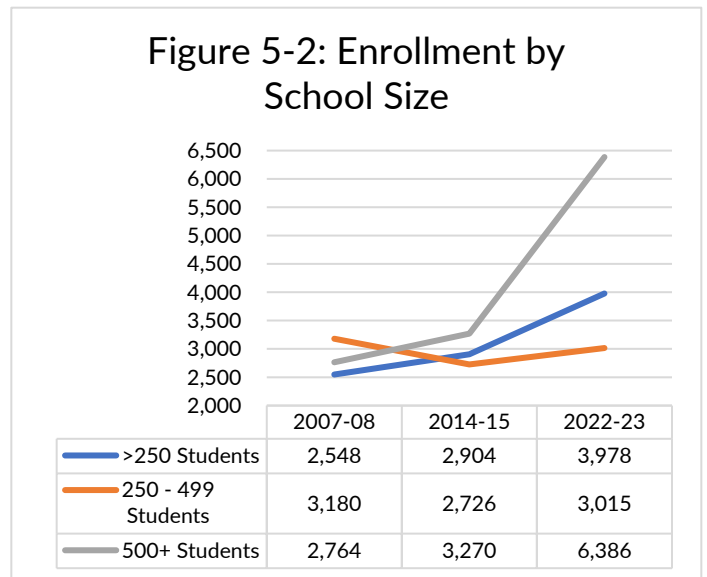
5.1.3 Do Parents Prefer Smaller Schools?

Based on the data, it does not seem that parents prefer smaller schools. Quite the contrary, the bulk of enrollment growth was in the largest schools.

As Figure 5-2 shows, Small schools (less than 250 students) added 1,430 students from 2007-08 to 2022-23. By contrast, Large schools with over 500 students added 3,622 students from between 2007-08 and 2022-23.

Medium size schools (250-499 students) actually enrolled 165 fewer students in 2022-23 compared to 2007-08 – reflecting several Medium-size schools that grew into the Large category.

Given that growth was heaviest in the largest schools, it does not appear that most parents prefer small schools to large schools. If that is the case, why haven't more Small schools grown into Medium size schools?



5.1.4 Is There No Space to Expand?

Perhaps schools are maxing out around 175 students because it's hard to get school buildings big enough grow into.

Conceptually, it is easier and cheaper to repurpose a residential or small commercial property into a small school than to find a larger property already suitable for an expanding school. As a rule, the larger and more bespoke a property, the rarer and more expensive it will be.

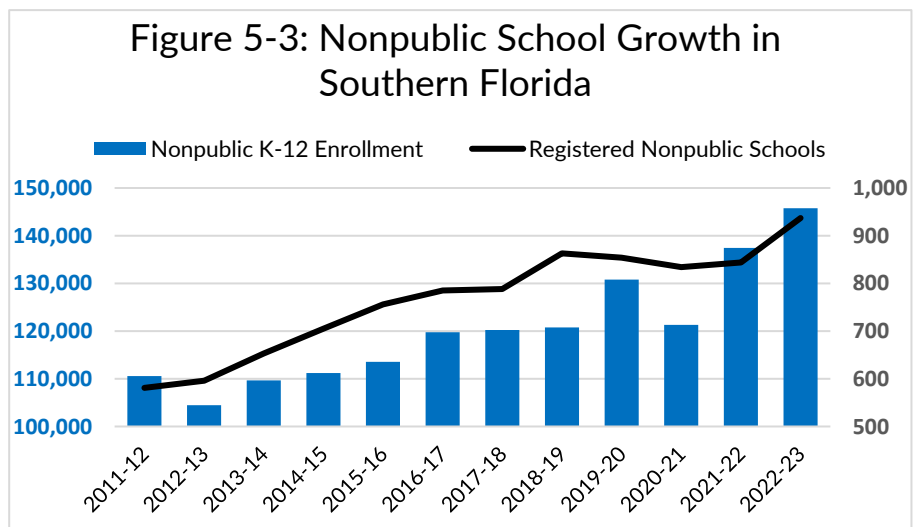
Adding another wing to an existing school building can be an option, assuming there is available vacant land, but requires a larger capital investment than simply renovating an existing building.

Another challenge is the schools cannot be opened just anywhere. Every local government has different zoning rules governing where schools can or cannot open and operate. In the City of Miami, for example, K-12 schools require a special permit to open anywhere in the city (except for a small patch of civic use land in the city center equal to 1% of the city area). The process for obtaining this permit takes months, at a minimum, and includes opportunities for nearby neighbors and homeowners associations to object to opening a school.

Most other localities in southern Florida have similarly restrictive zoning laws – which are in addition to local fire, traffic, and safety regulations for schools.

All of this is further complicated by the growing demand for all types of land in Southern Florida, where most Jewish schools are located. According to Redfin's Housing Market tool, from April 2019 to April 2024, median home sale prices increased by 70% in Broward County (+\$182,500), by 82% in Miami-Dade County (+\$250,000), and 82% in Palm Beach County (+\$230,000).

We would also expect growing demand for school buildings in particular due to the proliferation of nonpublic schools of all types – Jewish and Non-Jewish – in recent years. In 2011-12 state enrollment data shows 581 nonpublic schools enrolling 110,000 students in Miami-



Dade, Broward, and Palm Beach Counties. By 2022-23, these numbers had grown to 937 nonpublic schools enrolling over 145,000 students. These newly-formed nonpublic schools from other denominations are surely competing with Jewish schools for the existing inventory of properties suitable for a growing school.

So aside from the difficulties of finding a suitable property and complying with zoning and other regulations, it is growing increasingly challenging and expensive to acquire a school building from the existing stock of suitable properties in Southern Florida.

5.1.4 Is it Too Costly to Build New Schools?

How expensive is it to build a new school?

Consider a successful small school that wants to buy land and build a larger campus suitable for up to 400 students in Miami-Dade County, as well the following assumptions:

- **Space Requirements** – According to “Area Required to Set up a School” calculator available from the consultancy Global Services in Education, a school typically requires 160 square feet of land and 110 square feet of building space per student.⁶ Thus a school for 400 students should have around 64,000 square feet of land and 44,000 square feet of building space.
- **Land Costs** – According to LandSearch.com, an acre (43,560 square feet) of vacant land in Miami, FL costs an average of \$684,900.⁷ This amounts to about \$16 per square foot.
- **Construction Costs** – According to the consultancy Building Design + Construction, the cost per square foot for school building construction in Miami in 2024 is between \$198 and \$208.⁸
- **Zoning** – For the purposes of this thought exercise, we will assume that zoning permission can be obtained with relative ease.

With these assumptions in mind, a rough estimate of the cost to build a new school for 400 students in Miami is about \$1 million for the land and \$9 million for the construction, for a total estimated cost of \$10 million.

$$\frac{(64,000ft^2 * \frac{\$16}{ft^2})}{Land\ Costs} + \frac{(44,000ft^2 * \frac{\$205}{ft^2})}{Construction\ Costs} = \$10,044,000\ total\ school\ cost$$

Even if a school planned to obtain a commercial loan to finance the project (the annual payment for which would be about \$535,000 per year – or \$1,337 per student), they would still need to raise about a third of the cost to cover a downpayment. For most small Jewish schools, \$3.3 million is not easy to obtain.

Thus, it is very plausible that small Jewish schools are struggling to expand because they cannot find or afford big enough school buildings with the right zoning permissions.

These factors, combined with the evidence that existing Jewish schools are nearly full, are probably a major reason that so many new Jewish schools are opening, but staying relatively small.

5.1.5 Do the New Schools Need More Time to Grow?

Perhaps the 29 new schools that opened since 2007-08 simply need more time to grow into larger schools. They could be now identifying zoning-compliant properties and raising the capital to expand.

This is also quite possible. Most of these new schools have opened since 2014-15, and it takes years to gain the confidence of parents and donors that a school is viable and worth the investment for long term expansion.

This question can only be definitively answered with time. In the meantime, we recommend identifying and tackling the known zoning, school property inventory, and seed capital challenges that already appear to be constraining growth in Jewish schools.

⁶ GSE's calculator can be accessed online at: <https://www.gsineducation.com/blog/area-required-to-set-up-a-school>

⁷ Retrieved from <https://www.landsearch.com/properties/miami-fl> on June 6, 2024.

⁸ Available on the consultancy's website at: <https://www.bdcnetwork.com/k-12-school-construction-costs-2024>

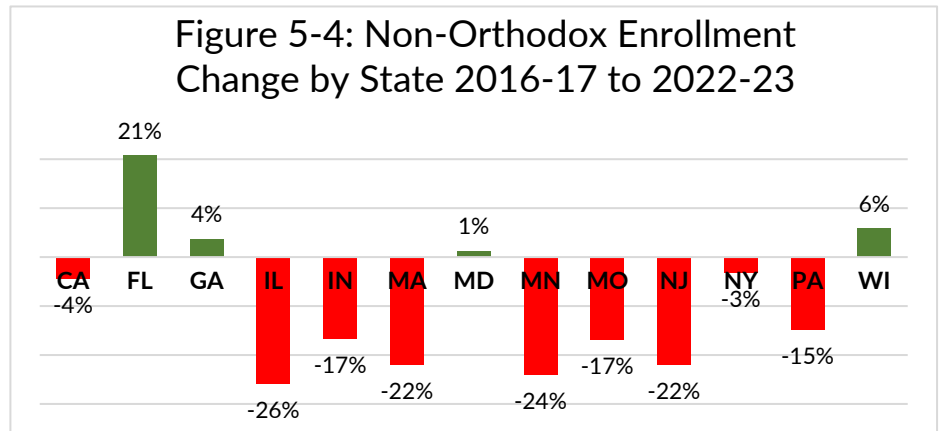
5.2 Explaining the Unprecedented Growth in Non-Orthodox Schools.

Since bottoming out in 2016-17, enrollment in Florida Non-Orthodox schools has increased by 21%.

This is in stark contrast to Non-Orthodox Jewish school enrollment in the rest of the nation, which has almost invariably shrunk over the same period. Indeed, nationwide enrollment in Non-Orthodox schools has been declining since AVI CHAI's first Census of Jewish day Schools was published – from 36,897 in 1998-99 to 30,756 in 2018-19 (-17%).⁹

As Figure 5-4 shows, of the 13 states that collect and publish nonpublic school enrollment data for the years 2016-17 and 2022-23, only three other states saw positive enrollment growth in Non-Orthodox schools – and none achieved the 21% growth rate seen in Florida Non-Orthodox schools.¹⁰

So why is Florida bucking these trends?



5.2.1 Where is the Growth in Non-Orthodox Schools?

As we saw in Figure 4-2, the shifting fortunes of Non-Orthodox schools reflect a long-term decline in losses from attrition. If attrition is declining, in which specific grades has student retention improved?

Table 5-1 below lists the average attrition rates by grade for Non-Orthodox schools in each time period.

Time Period	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th
2007-08 – 2011-12	-9.2%	-8.3%	-10.0%	-8.5%	-11.1%	-33.9%	-9.3%	-8.7%	-73.9%	-4.2%	-3.4%	3.2%
2012-13 – 2016-17	-6.9%	-3.9%	-4.0%	-6.5%	-6.8%	-32.3%	-7.3%	-4.8%	-57.0%	1.7%	-1.2%	-1.8%
2017-18 – 2020-21	-5.1%	-4.2%	-2.7%	-2.3%	0.3%	-37.8%	0.5%	1.0%	-38.1%	-0.7%	-5.2%	-2.7%
2021-22 – 2022-23	-6.0%	-3.4%	-2.4%	0.6%	1.2%	-30.7%	1.4%	-0.5%	-26.9%	2.3%	0.0%	0.0%

It seems clear that attrition in Non-Orthodox schools has been improving across the board. Year-on-year student losses have declined in each successive period in almost every grade (with a few exceptions).

Indeed, in several grades – 4th, 5th, 7th, and 10th – Attrition turned positive in the 2021-22 to 2022-23 timeframe as more students joined the Non-Orthodox school system in the grades after Kindergarten than leave.

It is also clear that the grades with the most losses from attrition are consistently 6th and 9th grade. These are the grades students are graduating from elementary or middle school, respectively, and must select a new school. At these inflection points it seems a large number of parents select schools outside the Non-Orthodox school system.

The data shows a remarkable drop over time in losses from attrition in 9th grade. From 2007-08 to 2011-12, only 26% of 8th grade students remained in the Non-Orthodox school system for high school. Yet the number of 8th graders

⁹ Per [A Census of Jewish Day Schools 2018-2019](#), Table 2, published by the AVI CHAI foundation in 2020. These total Non-Orthodox figures were obtained by adding together enrollment in Solomon Schechter, Reform, and Community schools.

¹⁰ These data are drawn from state education department publications from the various states, compiled by the Teach Coalition Office of Jewish Education Policy and Research in preparation for a forthcoming study on national Jewish school enrollment trends.

continuing on to Non-Orthodox high schools increased dramatically to 43% from 2012-13 to 2016-17, to 62% from 2017-18 to 2020-21, and to 73% from 2021-22 to 2022-23.

Indeed, the number of students in Non-Orthodox high schools doubled from 247 in 2007-08 to 550 in 2022-23.

And this does not simply reflect the opening of new Non-Orthodox high schools to serve a pre-existing demand. In 2007-08 there were two Non-Orthodox schools offering high school grades: the David Posnack Hebrew Day School in Broward County and the Donna Klein Jewish Academy in Palm Beach. By 2022-23, one new Non-Orthodox high school had opened: the South Florida Jewish Academy in Broward County which enrolled a total of 26 high schoolers. Nearly all of the growth in Non-Orthodox Jewish high schools occurred in the same two schools – Posnack and Donna Klein - that already existed in 2007-08.

Thus, from 2007-08 to 2022-23 Non-Orthodox schools have substantially improved their ability to retain or attract students after Kindergarten, and especially in the transition to High School.

5.2.2 Has COVID-19 Driven Students to Non-Orthodox Schools?

The COVID-19 pandemic may seem like an attractive explanation because it coincided with the two years when Florida Non-Orthodox schools saw the highest growth rate – 2021-22 and 2022-23.

Indeed, the Brookings Institution found large declines in K-12 public school enrollment after the COVID-19 pandemic, suggesting that a large number of parents switched their children from public schools to other modes of schooling in response to the pandemic.¹¹ Given that Non-Orthodox families are more likely than Orthodox families to send their children to public schools,¹² perhaps closures and unpredictability in public schools relating to the pandemic provided a substantial boost to enrollment in Florida's Non-Orthodox Jewish schools.

But this explanation is insufficient for three reasons.

First, every state was hit by the pandemic. COVID-19 cannot explain why Non-Orthodox enrollment is growing in some states but not others.

Second, the states that saw positive Non-Orthodox enrollment growth since 2016-17 – Florida, Georgia, and Wisconsin – tended to return to in-person public school instruction faster than the other states. Reviewing the interactive map of U.S. School Learning Models 2020-2021¹³ published by the COVID-19 School Data Hub, by September 2020 all Florida public schools and about half of Wisconsin and Georgia public schools were 100% in person – a much higher proportion of in-person public school learning compared to other states with substantial Jewish school populations.

Finally, while growth in Florida Non-Orthodox schools was highest starting in 2021-22, they began consistently growing starting in 2017-18 – several years before the pandemic. Indeed, Table 5-1 above shows that losses from attrition in Florida's Non-Orthodox schools have been declining steadily since 2007-08 while gains from structural change have stayed steady even after the pandemic. This suggests that a longer-term trend is at work.

5.2.3 Are State-Supported Scholarships Driving Growth in Non-Orthodox Schools?

Florida has long had the largest publicly supported K-12 scholarship programs in the nation. In Fiscal Year 2022-23, the state spent \$2.05 billion on scholarships and education savings accounts for 257,613 students, or 63% of the K-12 nonpublic school students in the state.¹⁴

Scholarships make it easier for Jewish parents to afford Jewish schools. Is it possible that the growth of state-supported scholarships has reversed the trend of declining enrollment in Florida's Non-Orthodox Jewish schools?

Florida's state-supported scholarship program – in fact, a combination of six separate scholarship programs – has grown substantially over time. In 2009-10, scholarships were limited to students under 200% of the Federal Poverty

¹¹ [Declining School Enrollment Since the Pandemic](#), by Eloise Burtis and Sofoklis Goulas and published in 2023 by the Brookings Institute.

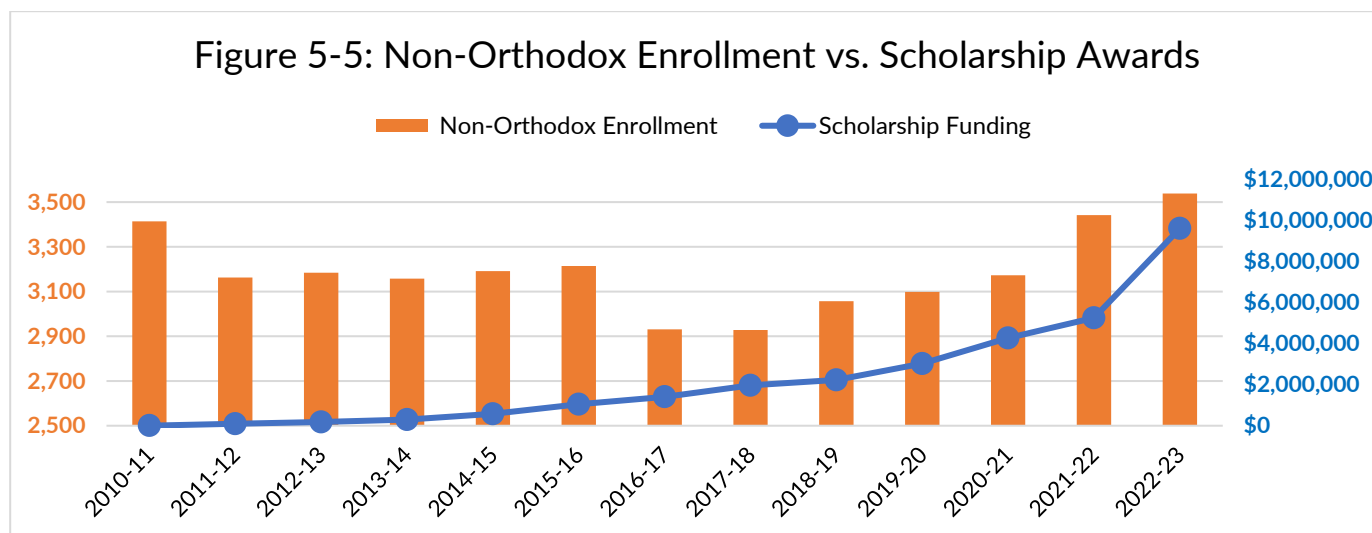
¹² In the [2014 Greater Miami Jewish Federation Population Study](#), it was found that 90% of Orthodox families send their children to full-time Jewish schools, compared to 39% for Conservative families and 22% for Reform families.

¹³ Available at: <https://www.covidschooldatahub.com/>

¹⁴ Based on reports by the Florida Department of Education, Florida Legislature, and Step Up for Students.

Level (\$62,400 for a family of four in 2024 dollars).¹⁵ Moreover, students had to transfer from public school to nonpublic school or be entering Kindergarten or First Grade to qualify for a scholarship.

Given these restrictions, it is not surprising that only two students in Non-Orthodox schools received state-supported scholarships totaling \$2,607 in Fiscal Year 2010-11.



In 2010 the legislature increased the scholarship program income limit to 230% of the Federal Poverty Level (\$71,760 for a family of four in 2024 dollars) and began increasing the maximum scholarship size from 60% of based public school funding in 2010-11 to 80% in 2015-16. It eliminated the requirement to switch from public school in 2014-15. Concurrently, the number of students in Non-Orthodox schools receiving scholarships increased to 179 by the 2015-16 school year – 5% of students in Non-Orthodox schools – and scholarship awards to Non-Orthodox schools totaled \$1,045,000. Meanwhile, Non-Orthodox schools’ annual losses from attrition from 2012-13 through 2016-17 averaged -11.5%, four percentage points lower than from 2007-08 to 2011-12.

Starting in 2016, the year Teach Coalition’s local Teach Florida affiliate was founded, the legislature began increasing the program’s income eligibility limit (to 260% of the Federal Poverty Level in 2016; \$81,120 for a family of four) and scholarship size (up to 100% of base public school funding by 2020).

By Fiscal Year 2020-21, 498 students in Non-Orthodox Schools were receiving scholarships – 16% of students in Non-Orthodox schools – and scholarship awards totaled \$4,276,110. Meanwhile, Non-Orthodox schools’ annual losses from attrition from 2017-18 through 2020-21 averaged -8.3%, three percentage points lower than from 2012-13 to 2016-17.

Table 5-2: Average Annual Attrition and Scholarship Awards in Non-Orthodox Schools

	2007-08 - 2011-12	2012-13 - 2016-17	2017-18 - 2020-21	2021-22 - 2022-23
Attrition	-15.8%	-11.5%	-8.3%	-5.9%
% of Students on State Scholarship	nil ¹⁶	4%	12%	23%
Average Size of State Scholarship	-	\$5,494	\$7,694	\$8,150

¹⁵ The income limit and the transfer requirement never applied to the McKay Scholarship for students with special needs.

¹⁶ School-level scholarship data provided by StepUp for Students extends back to 2010-11. In 2010-11, only 2 students in Non-Orthodox schools received scholarships, indicating that in this entire early period the number of students on scholarships was negligible.

Starting in 2021, the legislature increased the scholarship program’s income eligibility limit for first-time applicants to 375% of the Federal Poverty Level (\$117,000 for a family of four) and eliminated the income limit for returning scholarship students. In 2022, the income limit further increased to 400% of the Federal Poverty Level (\$124,800 for a family of four).

Continuing the trend, scholarship awards in Non-Orthodox schools continued to rise, and losses from attrition continued to fall. In Fiscal Year 2022-23, 1,140 students in Non-Orthodox Schools were receiving scholarships – 32% of students in Non-Orthodox schools – and scholarship awards totaled \$9,620,610. Meanwhile, Non-Orthodox schools’ annual losses from attrition from 2021-22 through 2022-23 averaged -5.9%, two-and-a-half percentage points lower than from 2017-18 to 2020-21.

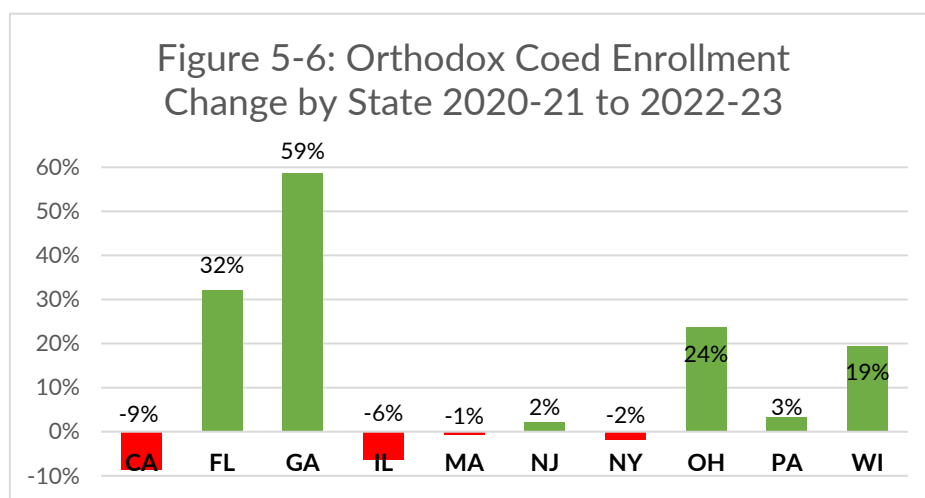
Thus, the two trends in Non-Orthodox schools of declining losses from attrition and rising state scholarships are highly correlated and logically connected. It seems likely that Florida’s growing state scholarship programs contributed substantially to the unprecedented growth in Non-Orthodox Jewish schools since 2016-17.

5.3 Explaining the Unprecedented Growth in Orthodox Coed Schools.

Another major finding of our study is that since 2020, enrollment in Florida’s Orthodox Coed schools has skyrocketed, from averaging under 3% until 2020-21 to averaging nearly 15% since then (per Table 4-1).

This turnaround is particularly remarkable because it is almost unique to Florida (see Figure 5-6).

Only three other states have seen meaningful percentage increases in Orthodox Coed enrollment since 2020-21 - Georgia, Ohio, and Wisconsin. And given their smaller baseline enrollment, the large percentage increase in these three states only amount to an additional 336 students in total, compared to the additional 1,016 students in Florida’s Orthodox Coed Schools.



5.3.1 Where is the Growth in Orthodox Coed Schools?

Table 5-3 (an excerpt of Table 4-2) indicates that since 2021-22 both structural change and attrition have become major growth drivers. In other words, not only are Kindergartens growing faster than ever – a good sign for long-term growth – but also many students are entering those schools mid-career.

		2007-08 – 2011-12	2012-13 – 2016-17	2017-18 – 2020-21	2021-22 – 2022-23
Orthodox - Coed	Attrition	-1.8%	0.9%	0.7%	10.8%
	Structural Change	0.9%	2.0%	2.1%	4.0%

Table 5-4 below lists the average attrition rates by grade for Orthodox Coed schools in each time period. We see that even before 2021-22, retention was modestly improved as losses from attrition in 6th and 9th grades were stemmed.¹⁷

¹⁷ It is possible that attrition tends to spike in grades 6 and 9 is because those are inflection points when a student is switching to a Middle or High School. These are times when some parents may prefer a single gender environment over a coeducational environment.

However, the sea change since 2021-22 is seen across the board. Attrition went positive in nearly every grade; annual losses of a fifth or more students in 6th and 9th grade have halved.

Table 5-4: Orthodox Coed Attrition Rates, By Grade and Time Period

Time Period	1st	2nd	3rd	4th	5 th	6th	7th	8th	9th	10th	11th	12th
2007-08 – 2011-12	-8.1%	-6.7%	-7.4%	-6.3%	-8.0%	-24.1%	-7.4%	-6.3%	-47.6%	-9.3%	-4.1%	-2.6%
2012-13 – 2016-17	-4.1%	-1.1%	-1.7%	-4.0%	-3.4%	-20.2%	-3.2%	-2.8%	-34.5%	1.8%	-2.4%	-1.5%
2017-18 – 2020-21	-1.2%	-2.7%	-1.6%	-1.2%	0.8%	-21.5%	1.2%	-0.9%	-22.9%	0.6%	-4.0%	-2.3%
2021-22 – 2022-23	8.5%	3.1%	4.7%	7.2%	6.2%	-10.4%	5.9%	1.9%	-9.0%	12.0%	3.7%	0.3%

Hundreds of students are clearly switching into Florida’s Orthodox coed schools mid-career. Where are they switching from, and why?

5.3.2 Are They Switching into Orthodox Coed Schools from Public School?

The American Orthodox Jewish community has never heavily utilized the public school system. Consistently across regions and decades, 90% or more of Orthodox Jewish household report using the Jewish day school system.

Table 5-5: Full-Time Jewish Schooling Rates, Select Communities

	Year	Orthodox	Conservative	Reform
Baltimore	2010 ¹⁸	90%	37%	6%
	2020 ¹⁹	89%	14%	1%
	Change	-1	-23	-5
Miami	2004 ²⁰	89%	39%	20%
	2014 ²¹	90%	39%	22%
	Change	+1	0	+2
New York	2011 ²²	93%	28%	8%
	2024 ²³	97%	24%	10%
	Change	+4	-4	+2

Note: Baltimore, Miami, and New York (including New York City plus Nassau and Westchester counties) are the only major Jewish communities that have completed two population studies over the past two decades for which both studies break down Jewish education enrollment by denomination.

There is some evidence that Modern Orthodox families may utilize public schools at a higher rate than Orthodox Jews as a whole. A 2017 survey of Modern Orthodox families by Nishma Research found that “83% of respondents’ children in grades 1-12 attend an Orthodox Jewish day school, and 75% of the schools are either fully (45%) or partially (30%) coeducational.”²⁴ While percentages aren’t directly comparable across studies with different methodologies, it is possible that Modern Orthodox families primarily attend Coeducational schools, and possibly attend Jewish schools at a lower rate than Orthodox Jews as a whole.

If so, then some of the students switching into Orthodox Coed Jewish schools may have come from public school.

However that cannot be the full story. A net of 739 new students switched into Orthodox Coed Jewish schools since 2021-22 – swelling grades 1-12 by a massive 25%. It is unlikely that public schools enrolled as many as one student from the “potential Orthodox Coed School” universe for every four students already enrolled in Orthodox Coed schools. And it is even more unlikely that every single student from the “potential Orthodox Coed School” universe in public school would have switched over to an Orthodox Coed school in just two years.

¹⁸ [The 2010 Greater Baltimore Jewish Community Study](#), Page 59.

¹⁹ [Portrait of Jewish Baltimore: Baltimore’s Jewish Community Study 2020](#), Page 62.

²⁰ [2004 Greater Miami Jewish Federation Population Study](#), Page 742.

²¹ [2014 Greater Miami Jewish Federation Population Study](#), Page 761.

²² [Jewish Community Study of New York: 2011](#), Page 184.

²³ [2023 UJA Federation of New York Community Study](#), Section on Children and Jewish Education.

²⁴ [The Nishma Research Profile of American Modern Orthodox Jews](#) (2017).

Nor does it explain why this trend is not evident in Orthodox Coed schools in New York, New Jersey, Pennsylvania, California, or Illinois. Why would Jewish students in Florida public schools switch to Orthodox Coed schools at a much higher rate than these other states?

5.3.3 Are They Switching into Florida Orthodox Coed Schools from Other States?

There is substantial evidence that people are moving to Florida from other states. From 2020 to 2022, Florida had the highest level of net migration – people moving into the state minus people moving away from the state – in the nation, with a net of 622,476 residents moving from other states to Florida during this time.²⁵

Meanwhile, New York had the highest rate of net out-migration in the country. From 2020 to 2022 a net of 664,921 residents moved from New York to other states – and Florida was the most popular destination for New Yorkers, capturing 182,959 of those who moved away over those two years.²⁶

Given that New York has the most Jewish day school students in the country, about 64% of national total Jewish enrollment according to the 2018-2019 AVI CHAI Census of Jewish Day Schools, it would come as no surprise that any Jewish day school families transplanting from New York to Florida would swell enrollment in local schools as well.

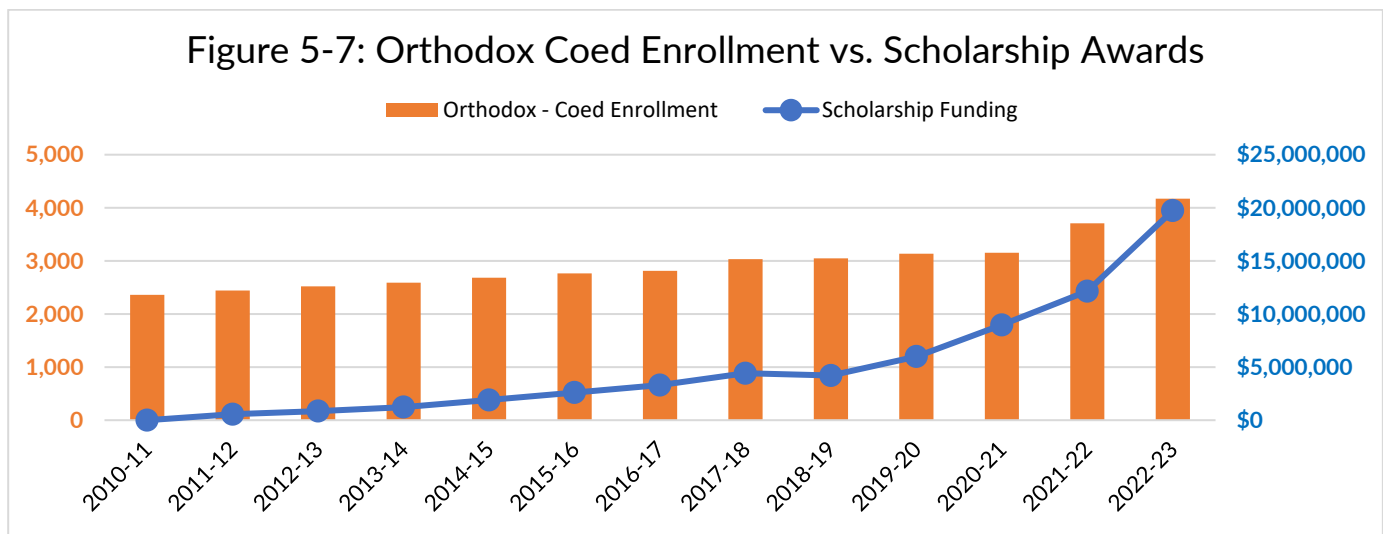
This thesis is somewhat supported by nonpublic school enrollment data from the New York State Education Department. Whereas attrition in New York Orthodox Coed Jewish schools averaged -3.0% from 2014-15 to 2023-24, it spiked to -4.0% in 2020-21 and 2021-22. This shift represents an extra 200 students per year leaving New York Orthodox Coed schools compared to the 2014-15 to 2023-24 average.

However, this too cannot be the full story. According to the same Census Bureau data, 166,524 New Yorkers moved to New Jersey since 2020 and 63,978 New Yorkers moved to California. Yet Figure 5-6 shows that New Jersey and California saw flat (or negative) enrollment gains in Orthodox Coed Jewish schools over the same period.²⁷

Why would New York Jewish day school families prefer Florida over other popular destinations?

5.3.4 Are They Moving to Florida for the Scholarships?

As noted in Section 5.2.3, in 2021-22 the Florida legislature substantially increased the state scholarship program's income eligibility limit and eliminated the income limit for returning scholarship students. In 2022-23, the income limit further increased to 400% of the Federal Poverty Level (\$111,000 for a family of four). This corresponds to a major increase in the number of students in Orthodox Coed schools receiving scholarships.



²⁵ [Annual and Cumulative Estimates of the Components of Resident Population Change for the United States, Regions, States, District of Columbia, and Puerto Rico: April 1, 2020 to July 1, 2022](#), U.S. Census Bureau.

²⁶ [State-to-State Migration Flows: 2022](#) and [State-to-State Migration Flows: 2021](#), U.S. Census Bureau.

²⁷ It is possible that New York Jewish day school students were indeed moving to New Jersey and California, but these gains were offset by New Jersey and Californian day school students moving to Florida. Regardless, the questions remains: Why does Florida appear to be the prime destination for migrating Jewish families?

Whereas in the four years before 2021-22 the percentage of students receiving scholarships averaged 22%, this increased dramatically with the income limit in 2021-22 and 2022-23. Now over half of Non-Orthodox students receive scholarships. At the same time, the system has begun growing 10.8% per year from students switching into Orthodox Coed schools.

Table 5-6: Average Annual Attrition and Scholarship Awards in Orthodox Coed Schools

	2012-13 - 2016-17	2017-18 - 2020-21	2021-22 - 2022-23
Attrition	0.9%	0.7%	10.8%
% of Students on State Scholarship	14%	25%	52%
Average Size of State Scholarship	\$5,365	\$7,512	\$7,844

The fact that both scholarship rates and positive attrition surged at the same time in 2021-22 and 2022-23 suggests that the two are related.

It is logical that the availability of scholarships worth almost \$8,000 per student to over half of students would influence the relocation decisions of Jewish school families in New York. It's clear that hundreds of thousands of people had already decided to leave New York regardless of Florida's scholarship policies. According to a report by the New York State Comptroller's office, this exodus from New York was largely in response to the COVID-19 pandemic, with families exiting at a higher rate than single person households.²⁸

However, when choosing *where* to move, a Jewish day school family that spends \$15,000+ per child out-of-pocket on day school tuition could find an \$8,000 per child scholarship quite attractive.

The attractiveness of Florida to such families will only have grown in the 2023-2024 school year, when the state's universal scholarship eligibility policy became active. Now any student in the state can receive a scholarship worth about \$8,000 regardless of income.

Thus, it seems quite likely that once Jewish day school families in New York had already chosen to leave the state because of the COVID-19 pandemic, Florida was a very attractive option for many families due to the state's generous government supported scholarships programs.

5.3.5 A Similar Story for Orthodox Single Gender Schools.

Like Orthodox Coed schools, Orthodox Single Gender schools also saw a bump in positive attrition during the COVID-19 pandemic. Orthodox Single Gender schools grew at a healthy pace the entire period since 2007-08, with growing Kindergarten classes (structural change) consistently outpacing any losses from attrition.

However, while structural change from growing Kindergartens was consistent the entire period around 7%, attrition turned heavily positive only since 2021-22, indicating a large influx of Jewish day school students from other states during this time.²⁹

Table 5-7: Average Annual Attrition and Structural Change, by Time Period

		2007-08 - 2011-12	2012-13 - 2016-17	2017-18 - 2020-21	2021-22 - 2022-23
Orthodox - Single Gender	Attrition	-2.5%	-0.4%	0.2%	6.4%
	Structural Change	7.0%	6.7%	6.7%	6.8%

²⁸ [Taxpayer Movement During the Pandemic \(2023\)](#), New York State Comptroller's Office.

²⁹ It is highly unlikely that any significant number of parents who send to Orthodox Single Gender schools would consider public schools an option at any point. A notable exception can be for special needs children, whose needs can be prohibitively expensive to meet outside of a public school setting.

As with Orthodox Coed schools, this coincides with a large jump in the number of students in Orthodox Single Gender schools receiving state sponsored scholarships.

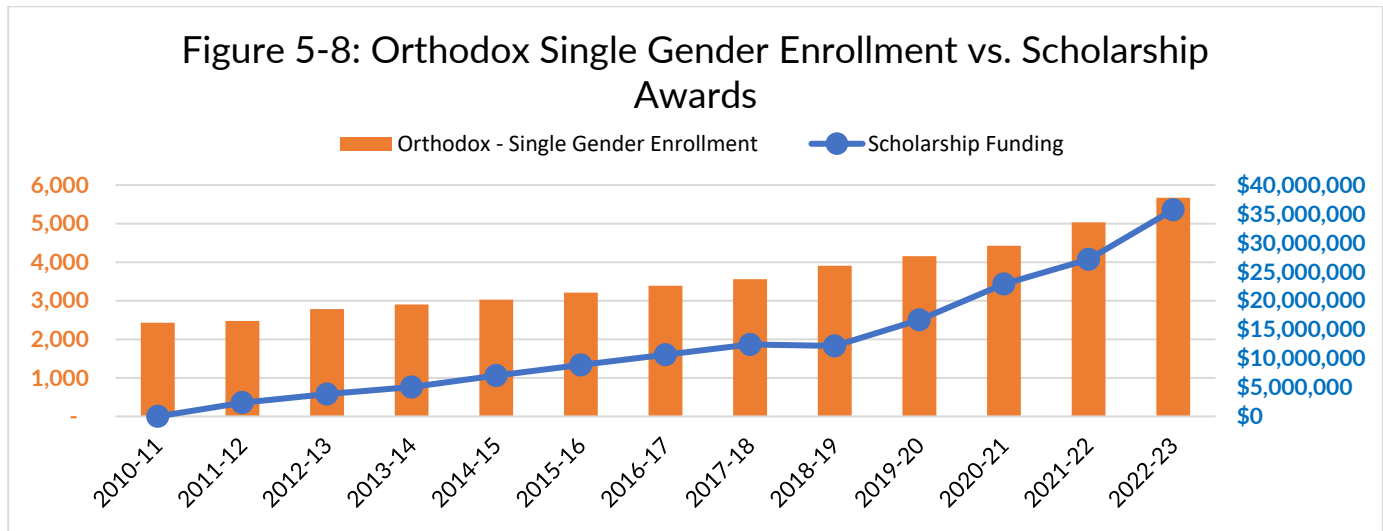


Table 5-8 indicates that while the scholarship rate at Orthodox Single Gender schools was already quite high - averaging 50% between 2017-18 and 2020-21 - attrition was only slightly positive before 2021-22.

Table 5-8: Average Annual Attrition and Scholarship Awards in Orthodox Coed Schools

	2012-13 - 2016-17	2017-18 - 2020-21	2021-22 - 2022-23
Attrition	-0.4%	0.2%	6.2%
% of Students on State Scholarship	44%	54%	76%
Average Size of State Scholarship	\$5,264	\$7,343	\$7,717

Florida’s generous state scholarship program likely did much to attract those families to Florida in particular.

6. UNANSWERED QUESTIONS.

6.1 Why Have Florida’s Non-Orthodox Jewish High Schools Expanded So Rapidly?

One trend observed in Section 5.2.1 is that while attrition losses in Non-Orthodox schools have declined in nearly all grades, the largest shift was in the 9th grade attrition rate. In 2007-08, only a quarter of 8th graders in Non-Orthodox schools were staying for high school; by 2022-23, three-quarters were staying for high school.

Table 6-1: High School Attrition and Scholarship Awards in Non-Orthodox Schools

	2007-08 - 2011-12	2012-13 - 2016-17	2017-18 - 2020-21	2021-22 - 2022-23
% of 8 th Graders Continuing to High School	26%	43%	62%	74%
% of High School Students on State Scholarship	nil	2%	10%	25%
% of All Students on State Scholarship	nil	3%	10%	23%

Scholarship growth alone doesn’t seem to account for this dramatic shift in Non-Orthodox high school retention. As we see from Table 5-3, the rate of high schoolers receiving scholarships was essentially the same as the average for all Non-Orthodox school students. Moreover, Non-Orthodox high school retention began improving half a decade before substantial numbers of students received scholarships. Finally, how could granting scholarships to 25% of students shift high school retention by 50 percentage points?

While scholarships do appear to be an important factor in the comeback that Florida Non-Orthodox schools have been mounting since 2016-17 – including across-the-board improvements in student retention – more research is needed to explain why Florida’s Non-Orthodox high schools have become so much better at retaining rising 9th graders in particular.

6.2 Will Families Keep Moving to Florida Post Pandemic?

We concluded in Section 5 that the impact of the COVID-19 pandemic was probably as follows:

1. Many Orthodox Jewish day school families chose to leave their current state (primarily from New York) because of the pandemic.
2. Once they were already moving away, many of these families chose Florida in particular because of the state’s generous scholarship programs.

There is no evidence that the state’s scholarship program alone was attracting large number of families to Florida before the pandemic. Even before 2021-22 (when the state increased the income eligibility limit from \$81,120 to \$117,000 for a family of four), over 50% of students in Orthodox Single Gender schools received scholarships but attrition was flat at 0.2% annually.

Thus, it seems clear that the pandemic interplayed with the state’s scholarship program to attract hundreds of students to Florida in 2021-22 and 2022-23.

What comes next? With the pandemic firmly in the past, it seems that outmigration from New York is beginning to slow. In 2023 the population of New State declined by just -0.52%, compared to -0.91% in 2022 and -1.24% in 2021. According to the Empire Center, the latest Census Bureau population data suggests that there is a slowdown in the exodus from the state.³⁰

³⁰ [Slowdown in Outflow, but No Robust Rebound in Latest NY Population Estimates](#), posted on the Empire Center blog on March 15, 2024.

On the flipside, as of the 2023-24 school year, Florida's state-supported scholarship program is now universal – every resident student regardless of income can receive a ~\$8,000 scholarship to attend nonpublic school.

Will this new policy continue to drive an influx of families into Florida? Will the lasting changes from the pandemic – such as the move to remote work – mean Jewish families are more mobile in the long term, or will this trend disappear along with the lockdowns?

More research – and time – is needed to answer these questions.

6.3 Will the Limited Supply of School Building Space Constrain Growth?

We concluded in Section 5.1 that newly opened Jewish schools may be staying small because there are no suitable facilities where they can expand. A combination of rising property prices, restrictive local zoning regulations, and the growing number of Non-Jewish nonpublic schools competing for the same buildings pose a major challenge for smaller Jewish schools with the ability – but not the space – to grow.

Nor is there much slack capacity in the existing stock of Jewish school buildings. In 2022, Step Up for Students conducted a survey of all nonpublic schools in Florida receiving state scholarships regarding their current and maximum enrollment.³¹ They found that Jewish schools at the time were at 87.3% capacity – nearly full! – with 12,122 current students and space for up to 1,759 more.

Given that Jewish schools added an additional 1,238 K-12 students in the 2022-23 school year alone, Jewish schools may be up as high as 96.2% full by now. While we are indeed seeing new Jewish schools open every year, there is a finite, heavily contested pool of locations suitable for a growing Jewish school.

More research is needed on viable community and policy responses to this capacity problem. Further research should include a comprehensive inventory of zoning in Southern Florida to determine which areas have favorable zoning rules. Possible policy interventions include state funding for nonpublic schools' capital investments (such as a revolving loan fund) and state pre-emption of certain local zoning restrictions.

³¹ The full results can be viewed on Step Up for Students' blog. See "Step Up For Students survey shows Florida's private schools may soon be full" posted on October 18, 2022.

About the Authors

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About the Organizations

Teach Coalition, a project of the Orthodox Union, is a nonpartisan, multi-state, grassroots movement devoted to advocating for equitable funding for nonpublic schools. Teach Coalition works to make nonpublic schools better, safer and more affordable. Teach Coalition advocates on behalf of approximately 90% of Jewish day school and yeshivah students nationwide and counts more than 90,000 dedicated volunteers, activists and subscribers among its supporters.

Step Up For Students is a nonprofit that administers several state-supported education choice scholarship programs in Florida, including the Florida Tax Credit Scholarship, the Family Empowerment Scholarship for Educational Options, and the Family Empowerment Scholarship for Students with Unique Abilities. In 2023-24, the organization served more than 400,000 students using the scholarships.