

# DAY SCHOOL

## *matters*

September 2008 • אלול תשס"ח • Elul 5768

### *Dear Friends:*

I am so pleased to have this opportunity to greet you on the dawning of the new school year 2008-2009, corresponding to the Hebrew year of 5769.

Given these new beginnings, I find myself reflecting on one of my favorite phrases in the Siddur. In the Shacharit (morning) service, shortly before the Shema, in the paragraph praising God as the creator of light, the Siddur describes God as renewing each day the work of creation *המחדש בטובו בכל יום תמיד מעשי בראשית*. It is easy to glide over these words without grasping the full weight of their meaning. Our ancestors who shaped this liturgical text appear to be conveying two profound messages in one short phrase. First, the work of creation is a continuing and ongoing process, not something that happened at just one point in time. Second, the process of renewing creation underscores the real presence of many opportunities to begin again, to start over, to improve, and to continue to be creative.

As appropriate as this verse is to the morning service, it also has great power to illuminate our path as a new school year unfolds. Education is a highly creative process; formulas usually do not work so easily. These words challenge each educator, whether teacher or administrator, to imitate the Divine by engaging in a process of renewal and creativity. In fact, this idea extends even into the board room of our day schools where the advent of the new year affords everyone the chance to begin with fresh energy and perspectives. I have always found these words to be inspirational and provocative, empowering me to free myself from past constraints in order to embrace and maximize the potential of creativity and renewal.

At PEJE, we take these words to heart as a new year dawns. We move further into our second decade by raising big questions about how to achieve the biggest impact on Jewish day school education across North America. We are not content simply to continue doing what we have done in the past. Through planning, reflection, and learning powerful lessons from others (even those outside of Jewish education), we believe that we can uncover perspectives which can lead to new and improved initiatives designed to grow and strengthen day schools. We will continue to pursue this path, even as we plan and implement a full range of programs and services, many of which are described in this issue or posted on [www.peje.org](http://www.peje.org).

During this introspective month of Elul, with Tishrei not far behind, I offer my prayer to each of you for a year of renewal and creativity as we re-commit ourselves to the sacred work of educating the next generation.

B'shalom,



Rabbi Joshua Elkin  
Executive Director



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**PEJE**  
PARTNERSHIP FOR  
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88 Broad Street, 6th Floor, Boston, MA 02110  
tel 617-367-0001 web [www.peje.org](http://www.peje.org)

# 2008 PEJE ASSEMBLY FOR



thirteen hundred day school professionals and volunteer leaders from around the world spent April 6-8, 2008 in Boston for the biennial PEJE Assembly, themed “Linked for Learning, Positioned for Growth.” The Assembly—held during PEJE’s 10th anniversary year—connected, educated, and inspired representatives of over 260 schools in pursuit of excellence in Jewish education.

Over the course of 100 workshops, attendees learned from a Who’s Who in general in Jewish education, marketing and communications, administration, philanthropy, federations, and research. They also celebrated the success of the MATCH program—146 schools received \$15 million—and applauded the 86 winners of the first PEJE Marketing Awards for exceptional and innovative practices.



## SPEAKERS

**Pat Bassett**, the president of the National Association of Independent Schools, discussed on Sunday night how to prepare students with “unlimited access, 24/7, to everything” for futures in which they would most likely have “jobs that don’t yet exist.” Bassett’s talk, “The Right-Brained Future: Creating 21st Century Schools and Strategic Indicators,” stressed creativity, innovation, conceptual learning, teamwork, and passion as traits most important to inculcate in students.

Former *refusenik* and Israeli minister **Natan Sharansky** brought the crowd to its feet Monday evening with a sociopolitical defense of day school education. Without a firm grounding in their own identity as Jews, he said, students will be unable to see that “identity is what makes your life bigger than your physical existence.” Sharansky added: “Parents want their children to be part of the bigger world. But enjoying this global freedom is meaningless if you can’t express your identity.”

“The future of Jewish day schools will not depend on what our students know, but how well they think.”

ALAN SILVERMAN

Board Member, Maccabi Academy of Asheville  
Asheville, NC

LINKED  
*for Learning*  
POSITIONED FOR GROWTH

# DAY SCHOOL EDUCATION



## World Café

For the first time, Assembly attendees participated in a World Café. In a series of simultaneous conversations, they discussed the future of leadership and affordability in day schools. As facilitators “harvested” the participants’ knowledge, experience, and passion, a graphic artist and a slam poet each interpreted these conversations into creative expressions.

The session handouts and harvest can be found at [peje.wikispaces.com](http://peje.wikispaces.com).

FOR FURTHER RECAPS OF THE ASSEMBLY, VISIT:  
<http://www.peje.org/networking/conferences/2008assembly>.

“I learned that I need to collaborate with, rather than outreach to, the local preschools and that I should not limit my scope to Jewish preschools only. I also learned a great deal about useful technology that will reach the young, high-tech family.”

MELANIE MARCUS  
*Admissions Director, Oakland Hebrew Day School  
Oakland, CA*



“For so long, Jewish education in this country seemed to lag a generation behind other schools and institutions. PEJE has been a major factor in pushing us into the 21st century.”

HELEN KADISH  
*Director of Development,  
Solomon Schechter Day School of Greater Boston  
Newton, MA*



# TIMELESS WISDOM: STRATEGIC FUNDRAISING

At a time when a school may have to choose between additional extracurricular programs and tuition hikes in order to meet the demands of excellence and affordability, non-tuition sources of income are more important than ever. The largest component of this is fundraising, but with the rising cost of quality education, the reliance on annual fundraising no longer provides the financial sustainability it once did. Fundraising must be approached strategically in order to secure the future of Jewish day school education.

As the National Association of Independent Schools recently described in a study, schools are increasingly dependent upon tuition dollars to finance their operations. This can be detrimental, however, to long-term fiscal security, as it forces schools to rely on enrollment numbers. The diversification of a school's sources of income, NAIS believes, is the key to maintaining socioeconomic diversity and affordability. While the report calls for "outside the box" thinking, too many

Jewish day schools have not yet explored every possibility "inside the box." Non-tuition dollars can be found beyond the typical sources of federation support and annual campaigns, yet still fall within the scope of "traditional" fundraising.

## Endowment Campaigns

"The best measure of a school's fundraising is that it is not crisis-driven," says PEJE's MATCH and Legacy Program Manager Sheila Alexander; in other words, the best practices in fundraising do more than close the gap between tuition and expenses.

Most donors respond better to a vision than to a gap in the budget, Alexander explains. The success of the MATCH Program—the new-donor matching grants—demonstrates that there is no shortage of donors potentially committed to day school education. Schools working with donors who care about the long-term vision of Jewish education can pursue strategic fundraising through endowed giving.

Raising funds on an annual basis does not permit schools to keep up with the rising cost of education; endowments provide a consistent stream of revenue detached from enrollment figures. Three vital day school expenses—facility maintenance, scholarships, and salaries—benefit from the proactive budgeting endowments allow. Universities, museums, and hospitals have long had success with such endeavors; having an endowment is a sign of institutional strength.

While only a relatively small number of schools have conducted endowment campaigns, that trend is starting to change. The United Jewish Communities of Metrowest NJ is working with three area day schools on a \$50 million endowment campaign, for which PEJE Partners Paula and Jerry Gottesman provided the lead gifts. In the words of Kim Hirsh, development officer at the UJC Metrowest, the endowments



**Most** donors respond better to a vision than to a gap in the budget.

will "enhance affordability and academic excellence." Emphasizing the value of endowments, Hirsh added that if schools had begun building endowments 40 years ago, there would be a vastly different financial situation in the day school field today.

The Solomon Schechter Day School of Essex and Union in West Orange, NJ is one of the schools participating in the Metrowest campaign. Director of Development Stephanie Bash-Soudry says the commitment, time, energy, and willingness of the Board are key to the success of any fundraising efforts. She notes that the "total commitment to fundraising by the Board chair can really make a difference." It certainly doesn't hurt, she says, to have development chairs who "make school fundraising like their job."

Other cities are pursuing similar joint-endowment ventures. Gail Littman, the director of endowments at the Jewish Community Foundation of San Diego, notes that some donors can be reluctant to give in large amounts during their lifetime, but that reluctance eases up

## Trustees & Fundraising

In the *Trustee Handbook*, NAIS author Mary DeKuyper suggests that trustees should be involved in fundraising in a number of ways:

- Assessing the capacity of donor prospects
- Identifying and assisting in the cultivation of donors
- Making the initial contact for solicitations
- Ensuring that the school's case matches the donor's interest
- Asking for donations to the school
- Thanking donors personally
- Monitoring progress toward reaching fund-raising goals

when they consider what will happen to their wealth after their death. Because of this, legacy gifts—wills and trusts—are a major component of endowed giving.

In collaboration with an endeavor from the Grinspoon Institute for Philanthropy to support Jewish camping, PEJE is sponsoring a pilot program to foster legacy giving in day schools. The participating schools entered the program with the involvement of their volunteer and professional leadership, and have found it easier than anticipated to secure legacy gifts.

### The Role of the Board

The drive for strategic fundraising ultimately comes out of a Board of Trustees practicing good governance, says PEJE Coach and Consultant Herb Tobin. A truly strong Board works closely with the school's development professional to play an active role in fundraising. In fact, in a 2006 survey of independent school Board members, 94% of respondents believed that it's "important" or "very important" for a Board to be a fundraising body.

BoardSource, an organization dedicated to the betterment of nonprofit Boards, writes in "The Source: Twelve Principles of Governance that Power Exceptional Boards" about the role Trustees play in sustaining resources:

*"They extend the reach of the organization by actively using their own reputations and networks to secure funds, expertise, and access. Members of exceptional boards bring intellectual power, as well as social and political capital, to the organization, thereby enhancing its reputation and capacity."*

A school should have the full participation of its Board in fundraising campaigns. This sends a confident signal about the school's direction. Additionally, PEJE Yardstick Benchmark reports found that higher Trustee participation rates are linked to lower student attrition. One important element of donor confidence is how the Board acts, as the Board is closest to the inner workings of the school. Long-term, responsible financial planning can be another selling point for prospective donors and parents.

As volunteer leaders, Trustees have a unique relationship to their day school. They are among the chief ambassadors for the school to the wider community. The director of development at Yavneh Academy of Dallas, Sandy Freling, says Board members are matched with potential donors based on "who knows who and who is comfortable" soliciting donations. Bash-Soudry adds that it can be "surprising" how readily donations come in when Trustees feel passionate about Jewish day schools and are willing to make the ask. These schools and others have found great success when pitches come from colleagues and peers.

By taking an active role in fundraising campaigns, Trustees also have the opportunity to tap into their day school's mission and promote its key messages to the community. The Leo Baeck Day School in Toronto is publicizing its legacy campaign by emphasizing

## LEARN MORE

- Visit [www.peje.org](http://www.peje.org) under the knowledge tab for tools, tips, case studies, and other resources on strategic fundraising and using endowment funds.
- Articles, pamphlets, and books are available through the National Association of Independent Schools ([www.nais.org](http://www.nais.org)). Of particular relevance is the new study "Reducing Tuition Reliance Through Alternative Sources of Income."
- BoardSource ([www.boardsource.org](http://www.boardsource.org)) has a wealth of resources designed to strengthen school governance.
- The Chronicle of Philanthropy ([www.philanthropy.com](http://www.philanthropy.com)) has a number of articles on endowments in its archives.

the school's place as the only Reform day school in Canada. Promotion for a campaign is also promotion for the school itself.

If the attendance at the PEJE Assembly session on legacy giving is an indicator, according to Alexander, there are many day schools with an interest in building legacy programs. They need not go it alone. Local federations have valuable experience with endowment campaigns, and partnerships with them can be very rewarding. PEJE and other organizations have a number of resources for schools looking to fund endowments. "It's not just about one school," says Bash-Soudry, "it's about Jewish continuity. It's part of a greater mission that we all share."



*Continue the conversation about strategic fundraising with PEJE. Join a Community of Practice (CoP) on leadership, development, or financial management. Additionally, see page 8 for information on the upcoming conference, "Getting the Right People on Your Board."*

# HATS OFF TO PEJE COACH MARCY BALOGH



PEJE Coach Marcy Balogh brings along some hats when she meets for the first time with a school's board and staff. Trustees get one color, she explains, and administrators receive another. The exercise illustrates how people in different positions have different roles—"wear different hats." Balogh also teaches how to take the hats off, and look at the big picture.

*To learn more about how your school can work with a PEJE coach, contact Sharon Haselkorn at [Sharon@peje.org](mailto:Sharon@peje.org).*

Balogh, a leadership consultant, has worked with PEJE since 1999 and has guided over 20 schools. A former therapist with a Masters Degree in Management, she is the founder of Ba-Lo Consulting. In addition to consulting with PEJE schools, Balogh works with organizations from across the U.S. in the non-profit, for-profit, and public sectors. A wife and mother of two children who are products of day school, she loves the opportunity to "help move the field forward." Day schools are vital, says Balogh, because "our people—leaders, professionals, students, and their families—successfully go on to have an impact on communities in the future."

While working with a school, Balogh strives to help leaders achieve better practices by sharing information and resources. "I don't do best practices," she emphasizes, "I do better practices." Best practices, she explains, don't really exist, as there's always room for improvement. Describing herself a real food lover, Balogh has her own recipe for making a coach-school relationship succeed: trust, risk-taking, commitment, shared vision, and—most importantly—a dash of fun.

Balogh coaches new school planning groups on how to tackle the challenges facing them by developing needed structure, systems, and people practices. With one such group in Florida, she has helped the governance body put its vision into practice. She notes simply "the Head of School has a tremendous dream, and it's my job to come in and help make that dream come true."

The rewarding part of being a PEJE coach comes after these sessions. Delighted when she can be a "connector," Balogh cites a partnership between two

of her grantee schools in California and Florida, aimed to improve their science labs. For another set of schools, Balogh brought the Board Chairs together to discuss meeting protocol. "The best part of this job is the people and seeing their growth," she adds.

Thrilled with the improvement the day school movement has seen over the years, Balogh does caution against one looming "bugaboo." Not enough schools have put succession planning at the forefront of their strategy, she says. Board Chairs, committee chairs, and Heads of School should all consider this in the short- and

**Marcy** strives to help leaders achieve better practices by sharing information and resources.

long-term. "We're not playing yet with a full deck of resources in the leadership area," Balogh warns, adding brightly, "but we're getting there." A forward-thinker, she says the future is "where I believe our energy should be placed."

With a cadre of coaches like Balogh working across North America, PEJE continues to build and strengthen the day school community by pairing schools with expertise and experience. Balogh gratefully thanks "all who make a difference in the lives our children," adding, "together, we can make great things happen!"



If two heads are better than one, then try 200!

Over 1,500 professionals and volunteer leaders are putting their heads together in seven different Communities of Practice (CoP), generating knowledge directly relating to their fields: admission, development, diverse learners, financial management, Israel engagement, leadership, and professional development.

Judy Zorfass, PEJE’s manager of CoPs, says that CoP participants connect to each other “because they share similar job responsibilities, issues, and concerns.” Over conference calls and the internet (and in person when possible), and guided by a facilitator, CoP members “meet” and address topics determined by their common needs and interests. Their members take these new insights back to their schools and communities to share, implement and refine them.

Taking advantage of the latest technology, each CoP has its own Google Group, an online discussion forum, for members to continue conversations beyond the scheduled meeting times. Lisa Sacks, a member of the Financial Management Community of Practice, says: “the speediness of replies and their content were invaluable in helping me make recommendations for how my school should proceed.”

To learn more about CoPs and read summaries of previous discussions, visit: [http://www.peje.org/networking/communities\\_of\\_practice](http://www.peje.org/networking/communities_of_practice).



#### WHY DAY SCHOOL MATTERS TO ME

“The study of Torah has eternally been the centerpiece of Jewish life. Day schools pump the lifeblood of Torah education into our future.”

BASYA WEINSTEIN

*Former NYC public school principal and incoming principal of Beth Jacob of Boro Park Brooklyn, NY*

#### WHY DAY SCHOOL MATTERS TO ME

“Day school education matters to me because it is important to respect our past and honor our traditions, and it is essential to invest in educating and celebrating our Jewish youth.”

MARK D. LERNER

*Principal owner of Washington Nationals Baseball Club and former member of the Board of Directors at Charles E. Smith Jewish Day School Rockville, MD*

## LEADERSHIP LINE

Since PEJE began the Leadership Line last year, day school leaders have received helpful, actionable advice on a variety of concerns and challenges. The Leadership Line is a one-hour phone call with a PEJE coach with broad and extensive expertise. To date, over 100 Heads of School, board members, and development and admission officers have dialed in regarding topics from board development to head support/evaluation to student recruitment/retention; in some cases, two or more leaders have participated.

Leadership Line callers say they’ve appreciated the practical advice and the opportunity to bring a fresh, expert perspective back to their schools. In a survey of participants, 100 percent of respondents reported that they were extremely satisfied with the suggestions they received, and 100 percent would recommend the resource to a colleague.

To arrange your no-cost call, contact [leadershipline@peje.org](mailto:leadershipline@peje.org).



**PEJE Day School  
Peer Yardstick™**  
*Suite of Tools*

The PEJE Day School Peer Yardstick™ Suite of Tools, a multi-faceted collection of management tools, developed by PEJE and Measuring Success, Inc., has provided hundreds school leaders with the information to make data-driven decisions.

The Yardstick Suite has five components:

- The Benchmark Report enables schools to compare themselves to the wider field on key indicators of enrollment growth and financial stability.
- The Jewish Day School Parent Survey—in limited release for the 2008-09 year—provides a streamlined method of gathering parent opinions.
- The Strategic Financial Modeling Tool offers schools the ability to create and refine models for a five-year plan towards financial stability and growth.
- The Admission Tracker manages the data on prospective students from initial contact through enrollment in an interactive, online platform.
- The Placement Tracker maintains information on a school's soon-to-be alumni as they apply to and enroll in next-level institutions (high school or college).

To learn more about the Yardstick Suite of Tools, visit:

[www.peje.org/knowledge/yardstick](http://www.peje.org/knowledge/yardstick)

Visit [www.peje.org](http://www.peje.org)  
for more upcoming events.



## UPCOMING TRAININGS & CONFERENCES

**Take Control of Your School's Future:  
The Strategic Financial Modeling  
Tool Training**

Monday, September 22  
*Los Angeles*

Monday, October 27  
*Miami*

Wednesday, October 29  
*Chicago*

**Admission Tracker Training Webinar  
(with purchase of the Tracker)**

Tuesday, September 23

**Getting the Right People  
on Your Board**

Sunday, November 16  
*Paramus, New Jersey*

Sunday, January 11  
*Los Angeles*

### WHY DAY SCHOOL MATTERS TO ME

“Intensive Jewish education has intrinsic and instrumental importance. Intrinsic because it transmits powerful values critical to our identity. Instrumental because it will yield the next leaders of Jewish life, leaders steeped in Jewish authenticity.”

LARRY MOSES  
*President of the Wexner Foundation*



88 Broad Street, 6th Floor, Boston, MA 02110  
tel 617-367-0001 web [www.peje.org](http://www.peje.org)