



Summary of Federation Research Continental Council Marketing & Advocacy Working Group

This represents a brief summary of a larger report that was presented to the PEJE Donor & Leadership Assemblies in February 2003.

I. Background & Methodology

The Continental Council Marketing & Advocacy Working Group's objective is to advocate for increased funding and support of Jewish day schools among the United Jewish Communities – Federation system. An underlying goal is to facilitate the strengthening of relationships and collaborations among day school supporters and Federations.

In order to achieve this, the Working Group saw a need to better understand current Federation attitudes, policies, and decision-making processes. The Working Group engaged Technical Development Corporation (TDC) to perform this research and associated analysis with a sample of Federations from across the U.S.

Federations were selected by JESNA and represented a range of large, large intermediate and intermediate size communities across North America. TDC performed individual interviews with 21 Executive Directors, 11 Presidents and 1 Planning Director at 28 different Federations. The interview protocol included questions on:

- How do day schools fit into Federation priorities?
- How strong is Federation support for day schools? Is it expected to change in the next three to five years?
- What messages about day schools resonate with Federation leaders?
- How are decisions made at Federations regarding allocations to day schools?
- How can day school supporters more effectively advocate for additional day school support at their community Federation?

The findings, therefore, reveal Federation leaders' perspectives on a variety of issues related to their support of day schools. No research was performed with day schools or other stakeholders to learn their corresponding perspectives on these issues.

It is important to note that interviews with Federation leaders indicated that individual Federation strategies, priorities, structure, culture, history, and community relationships are unique. However, these research findings reveal common themes that have broad implications for the Continental Council Marketing & Advocacy Working Group, day schools, and their supporters.

II. Key Findings

Key findings from the research are highlighted below.

What is the funding situation at the Federation?

Times are tough for Federation leaders. Leaders reported that they were contending with severe funding and organizational challenges. First, the downturn in the economy and the volatile stock market has made fundraising more difficult and endowments more limited. Second, the competing needs of Jewish constituencies (International concerns include Israel and Argentina) and increased domestic needs (Elderly, needy, day schools) has placed greater demands on the annual campaign. Most Federation leaders reported that annual fundraising donations were expected to be flat this year. Consequently, with a set allocation formula, most forecast flat or slight increases in their day school allocations. (For exact data, see the UJC Planning Dept Community Survey.)

What are Federation priorities?

All Federation leaders placed Jewish education in their first three funding priorities and were unanimous in their belief that day schools were an important component of Jewish renewal. In fact, all leaders spoke positively about day schools - with varying levels of enthusiasm. Day schools were praised for the intensity of Judaic studies, Jewish culture, values and religion; yet leaders also recognized that day schools serve a small number of Jewish children.

The main concern appeared to be equality for the community and scale. As one leader said, "We need to offer a big tent of educational options - from formal to informal - from children to adult." The growing need to support supplementary schools appeared to be prevalent at all Federations. The desire to serve all Jews with a broad spectrum of Jewish education and experiential learning options (i.e., camp, Israel travel, adult) was heard frequently.

What are the positive messages about day schools?

Federation leaders hear the following positive messages about day schools - in descending order of frequency.

- Great solution to Jewish continuity and survival issue.
 - " All the research shows, you need long duration and intensity. Need a critical mass of hours to learn about being Jewish."
 - Graduates have a higher level of Jewish competency and identity.
- Underpinning of Jewish community.
 - "Day schools offer kids and parents a great sense of community. In any private school, families feel they know each other better. But this is even more so in the Jewish community."
- Great quality of education - both religious and general.
 - "Educates our next generation of Jews."
 - "Any Jewish community of a certain size should have a good, healthy day school."
- Giving a gift to our children.
 - "Our children are our most precious possession - we must do everything we can."
- Teach strong values, rich heritage and tradition.
- Promotes Jewish marriages.
 - "Studies show non-existent intermarriage rate with day school grads."
- Builds our future leaders.
 - "They have the opportunity to mold the next generation of Jewish leaders."

What are the negative messages about day schools?

Federation leadership offered the following negative messages on day schools – in descending order of frequency.

- That day school is the only solution to continuity for all Jews.
 - “The panacea for what ails all Jews.”
 - “Do not overplay the continuity argument.”
- Scale and unfair bias to day schools – does not fund supplementary schools where most children are.
 - “It doesn’t solve the problem on the scale that we need to solve it.”
- Cost – It’s expensive.
- Scholarship need questioned.
 - “Important for lower-income families, but why subsidize those who can afford to pay tuition?”
 - “If you want it, you pay for it - equivalent of private schools
- Does not support public education.
 - “Public schools are vital in a democracy and should be supported by all.”
- Isolationist
 - “Kids don’t get exposed to the outside world. It breeds parochialism, too narrow.”
- Not a compelling case – Need for philanthropy is higher for elderly and/or needy.
- Elitist reputation.
- Day schools are a drain on the Federation.
 - “Bailout mentality”.
- Uneven community support – Provides disproportionate support to Orthodox community.

Are the messages effective?

When asked directly, do messages from day school advocates or naysayers affect your opinions, leaders said that they were not influenced by the messages, because they were already strong supporters of day schools. According to these leaders, effective day school advocacy must involve resources – both champions and financial support.

- “These messages do not affect me – we already believe in day schools.”
- “Messages do not change things – it is a question of advocacy and getting the community around it.”
- “Get behind the schools and support them.”

What challenges do day schools have?

Leaders shared some major concerns about day schools in their community. The number one issue mentioned was the long-term, financial stability. Leaders were worried about the schools’ short-term financial focus, operating costs and fundraising challenges. On a descending scale of importance, other concerns reported were the supply of quality teachers, school leadership, small scale and high competition with strong public and independent schools.

How are allocations decisions made?

Leaders were also asked how their personal philosophy influenced the allocations policy and decision making. Leaders reported that they provided long-term and strategic guidance to the allocation process. Others said – under their leadership - that the organization had completed a strategic plan with community goals and priorities. With that framework in place, leaders reported that they delegated specific decisions to the professional and lay

persons on the allocation committees. Nearly all said that they did not interfere with the established system and that it was important to let the committees “do their work.”

What are the new developments?

Across the USA, several Federations are running unusual, innovative funding and marketing programs to support day schools. For example:

- Chicago has 2 endowment programs and provides a 10% match for both. The Jewish Federations Jewish Day School Guaranty Trust accepts donations for all community schools and the Individual Day School Endowment Foundation accepts funds for specific CFJE schools.
- Phoenix is promoting day schools with a marketing program to increase awareness and enrollment.
- Milwaukee has a program supported by Helen Bader Foundation that provides need-based scholarships to day schools students.

Conversations with these leaders revealed a high level of involvement and ownership in the development and support of the initiative. Long-term vision, day school champions, new resources and frustration with current support were mentioned as critical factors in establishment of these new initiatives.

Upon hearing about these programs, other Federation leaders expressed a great interest in learning more details on the creation, impact and experience associated at these Federations.

What does it take to get new programs get started?

To establish funding programs at the Federations, there is no magic formula. Rather, leaders mention the omnipresent need for discretionary funds and for the effort to be prioritized above other pressing issues. Also, leaders noted that there needs to be a shift in thinking about financial solutions. As one leader put it, “we realized that allocations do not work alone. We take an integrated approach and create multiple paths of funding.” Another said, “we did the math and allocations will never make a big impact. We needed to take a new approach to funding with an endowment.”

The leaders also see themselves as an enabler of day school collaboration. Many leaders mentioned that they would like to convene and orchestrate more opportunities for collaborative efforts among community day schools and their other agencies.

What more can Federations do?

In addition to the annual financial support provided by the Federation, leaders were asked what more could they do. Many cited the broad array of financial, fundraising, and technical assistance services that they offer to all their agencies. One Federation leader noted that “we are always trying to expand our services to day schools ... the feedback (from a recent training program) was positive, they could not have done it on their own.” Leaders also suggested that day schools should take greater advantage of these services.

Services offered today vary by Federation, but include:

- Financial and accounting advice
- Strategic Planning
- Board development
- Fundraising assistance, Donor cultivation, and campaign advice
- Technology support

What more can day school supporters do?

Federation leaders were eager to share their ideas about what day school supporters could do to better advocate for Federation support. Most suggestions involved enhanced collaboration between schools, families and the Federation. The major suggestions centered on 5 main themes:

1. Be more involved with the Federation
 - Ensure there is cross leadership at the school and Federation
 - Get involved in Federation committees
 - Involve day school families
 - Increase regular communication
2. Get involved with the larger community
 - Get community leaders involved at school
 - Reach out beyond the school to the larger community
3. Collaborate with other schools
 - Proactively increase collaboration for quality, operational and cost reasons
4. Focus on educational excellence
5. Market the day school enterprise
 - Increase demand and marketing efforts

III. Conclusion

The research provided findings about current attitudes and decision making at Federations across the USA. In order to implement a broad advocacy program, it seems that a multiple-tiered approach is necessary. Strategies to reach Federation leaders, allocations committees, day school principals, supporters, families and communities are all components. There is no one single national solution - but rather locally-driven, collective initiatives that involve champions and resources operating at different echelons of the community. Wide communication - on new initiatives and success stories - is also critical to share day school "grass roots advocacy" from one community to the next.

Federation leaders closed with a final message for day school supporters:

- We are happy with our relationship with the day schools in our community.
- We want to help – we want to be a part of your success.
- Remember this is a two-way relationship – we are partners in the endeavor.
- We are here for you – many are willing to provide capacity building assistance, fundraising and technical support.

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