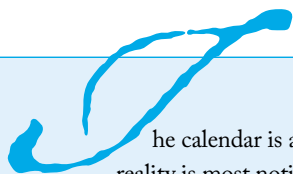


# DAY SCHOOL *matters*

September 2010 • תשרי תשע"א • Tishrei 5771



The calendar is a cycle; it brings us back to familiar territory year after year. This reality is most noticeable, perhaps, during this season of reflection—when the end of summer, beginning of fall, Rosh Hashanah, Yom Kippur, Sukkot, and Simhat Torah return to us once again. The cycle occurs inexorably, even as we are bidden to do *teshuvah*—to return ourselves to the path of righteousness and justice, and to turn ourselves around through the process of *heshbon hanefesh*. And so it is that once again, in these Days of Awe, we have a fresh opportunity to take stock of our souls and of our lives.

But is each cycle back to *Tishrei* exactly the same? Does one year simply roll into the next, with everything as it was before?

Our ancestors, while deeply honoring our precious traditions, also felt compelled to inquire, to debate, and, at times, to question the model of “business as usual.” Historic evidence is abundant. The transformation from the single, Temple-based worship to a multiple, synagogue-based model—and the entire complex evolution from Biblical to Rabbinic Judaism as we know it—are illustrative. Another example is the time-honored model of *bevruta*, which focuses on understanding traditional texts while encouraging questions and interpretations that reflect contemporary realities. But nowhere is our dynamic journey more apparent than in our prolific publishing of new *siddurim* and *mabzorim*.

Today this tradition remains alive and well. The Reform movement recently released a new *siddur*, *Mishkan T'filah*; the Conservative movement just published its latest *mabzor*, *Lev Shalem*; and the Orthodox Union recently produced a distinctive edition of the *Koren Siddur*, with commentary by Rabbi Jonathan Sacks.

How can we explain our proclivity to publish additional editions, translations, and commentaries of our key texts? Clearly, there are important lessons to be learned. Amongst them: our core traditions are a constant; each generation derives new meaning from our traditions; all new contributions are used within the context of a community; and the collective power generated when a community gathers together is overwhelming and inspiring, especially at this time of year.

As the new school year begins in earnest, may we be inspired and challenged by the blending of tradition with fresh, original commentary, which helps us to see our realities in different—and at times extraordinary—new lights. May we not isolate ourselves, but realize how much we have in common. Finally, let us harness the power of our collective effort. I am looking forward to sharing and learning with you in Baltimore at the 2010 PEJE Assembly for Advancing the Jewish Day School Field.

Shanah Tovah,

Rabbi Joshua Elkin, Ed.D.

Executive Director



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

# The Value of Case-Based Learning

**O**n Monday morning, October 25, PEJE Assembly participants will engage in intensive case-based learning (CBL), a proven methodology for professional development, institutional change, and community building. PEJE is pleased to bring this compelling approach, widely used in medical schools, law schools, and MBA programs around the world, to the professional and volunteer leadership of the Jewish day school field.

But just what is CBL? How will your participation in Monday's case study deepen your Assembly experience? And what skills can you expect to take back to your institution after the Assembly ends?

Featured here is an interview with Alex Pomson—the case study author and pioneer in using CBL as a vehicle for leadership development in the Jewish community—and Howie Deitcher, both of Hebrew University's Melton Centre for Jewish Education. Additional insights are offered by Marc Baker and Ray Levi, two heads of school who have applied case-based learning to nurture leadership and foster strategic thinking in their schools.

## **PEJE: What do you think makes case-based learning such a compelling, high-impact experience?**

**Pomson:** The case invites each person to enter a problem-based narrative through a “side door.”



Becoming drawn into the story is a powerful experience. When you multiply this by a factor of 1,000 Assembly participants, imagine the tremendous energy by a field-wide conversation that engages lay and professional leaders from diverse institutions.

**Deitcher:** Within the case discussion, you can't avoid making connections to your own reality. You might find yourself asking, “How did you know this was my school (or agency, or foundation)?” In point of fact, everyone always draws conclusions relevant to their own institutions.



**Pomson:** Case-based learning is stimulated by the need to resolve the case dilemma. At the same time, you recognize the challenges residing in your own world. However, it's safer to discuss the case than grappling with your own (possibly foreboding) issues.

**Deitcher:** Two critical capacities of strong leadership are being able to listen carefully to other's reasoning and argue your point persuasively and cogently. Case-based learning becomes a powerful venue for these exchanges.

## **PEJE: What can participants expect to occur during the four-hour block of time set aside for the case-based learning session at the Assembly?**

**Pomson:** The case study will address central questions impacting the Jewish communal education. It's divided into three episodes, each with supplementary appendices and multiple commentaries by respected “voices” in the field—for example, Pat Bassett of NAIS, Yossi Prager of the AVI CHAI Foundation, and Chip Edelsberg of Jim Joseph Foundation.

**Deitcher:** So, in addition to the ideas generated in your discussion group, you'll have a window into the thinking of those who have significant influence and authority in the field.

**Pomson:** But let's be clear: the outcome is not to accept one definable solution. Instead, you'll be motivated to dig more deeply into issues.

## Collaborative Inquiry in Action

When asked about the value of case-based learning (CBL), Ray Levi asserts that “discussions of a particular situation in a larger context are often intense.”

As head of school at the Amos & Celia Heilicher Minneapolis Jewish Day School, Levi has used CBL to delve into complex issues at leadership team meetings, during faculty meetings, and at board meetings. Having seen collaborative inquiry in action, he cites three healthy benefits of using cases:

- They create a cadre of reflective practitioners.
- They motivate data-driven decision making.
- They result in encouraging strategic thinking and planning.

“The ongoing use of cases produces new habits of mind and heart,” Levi reports. Examples abound in the way his staff, colleagues, and volunteer leaders now talk to each other during and between meetings. It's not unusual to hear, “I have a clarifying question about what you just said,” or “let me probe a bit more with my next question.”

**Deitcher:** By engaging with others, you can expect to get to know them in a more personal and meaningful way—much beyond the typical conference “meet and greet.”

**Pomson:** Everyone as an equal participant is expected to roll up his or her sleeves, listen to and share ideas, defend positions, and ask questions.

**Deitcher:** I want to add that you are likely to find the experience quite moving—besides being provocative and even fun. Because you’ll enter a narrative about people you can relate to, it has a compelling emotional potency.

### **PEJE: What have others who have engaged in case-based learning at conferences reported about their experience?**

**Deitcher:** People often say it was a revelation to hear possible solutions never before considered. One leader told me, “I saw that people had different approaches to solving this problem. It opened my eyes to the ways others can see the logic from a different perspective.”

### **PEJE: How will this experience be relevant when participants return to their institutions?**

**Pomson:** Case-based learning is about learning how to ask questions, developing new ways of thinking, and reaching deeper levels of self-awareness—critical leadership abilities required in today’s complex world. While the consequences may not be immediately evident, they will be apparent over time, as people start thinking in different and more productive ways.

**Deitcher:** Once you’ve tasted case-based learning you might begin to imagine its use back at your own institution. This is what happened to Marc Baker and Ray Levi, who, as heads of schools, have found ways to meaningfully integrate case-based learning into their own communities (see sidebars).



*Marc Baker, head of school at Gann Academy, learning with students*

## **The Power of Analytical Thinking**

“Being analytical” is a phrase that often crops up when talking about case-based learning with Marc Baker, head of school at Gann Academy in Waltham, MA.

Baker finds that the collaborative analysis of a case encourages people to distinguish what is really going on in the particular situation, unpacking the larger issues behind the obvious. For example, a case describing a parent’s complaints about a particular class may actually reflect poor communication about the school’s core pedagogy.

Using cases—with teachers, professional leaders at a retreat, at the board level—has created opportunities for high-level professional development at Gann. Baker emphasized how one benefit builds on another:

- Cases can create a collaborative, inquiry-based organizational culture.
- They give leaders a broader, “from the balcony” perspective.

The methodology of case analysis can build the kinds of skills and capacities that can be translated to other problem-solving situations.

“Case-based learning is about learning how to ask questions, developing new ways of thinking, and reaching a deeper level of self-awareness...”

ALEX POMSON

*Hebrew University of Jerusalem  
Melton Center for Jewish Education*

## **What Is Case-Based Learning?**

*Cases offer an opportunity to develop important group process and teamwork skills. The capacity to present and defend one’s viewpoint, to persuade and convince others, to collaborate and build on the ideas and knowledge of others, as well as the ability to listen carefully, are all developed through effectively led case discussion. Advocates stress the synergy that develops when multiple learners engage in the same task of analysis, action planning, and evaluation.*

*From Cases in Educational Administration (p. 2); Katherine K. Merseth, Harvard University*

*Cases are factually-based, complex problems written to stimulate ... discussion and collaborative analysis. Case-based learning involves the interactive, learner-centered exploration of realistic and specific situations. As learners consider problems from a perspective which requires analysis, they strive to resolve questions that have no single right answer.*

*From the Case-based Learning page of the Center for Instructional Development & Distance Education, [http://edutechwiki.unige.ch/en/Case-based\\_learning#What\\_is\\_case-based\\_learning.3F](http://edutechwiki.unige.ch/en/Case-based_learning#What_is_case-based_learning.3F). Retrieved 19:35, 11 October 2007 (MEST).*

# Timeless Wisdom: Day School Data

**PEJE** has long advocated for day schools to use data in decision making, and we practice what we preach. Over the past year, we have reached out to school leaders for information on a variety of measures pertaining to professional leadership, board leadership, and financial sustainability. Thanks to all who have responded: your feedback continues to inform the design and development of PEJE initiatives and resources—which, in turn, will benefit the entire Jewish day school field.

We are pleased to present some of these findings, along with explanations to help you better interpret the data. Keep in mind that these are benchmark figures for the 2008–2009 academic year. PEJE will continue to ask for this information on an annual basis to determine the impact of our work across the Jewish day school field.

## Heads of School

### USE OF COACHING

PEJE surveyed schools' top professional leaders about their use of coaching, which has long been a core element of PEJE's theory of change. In his introduction to the *PEJE Guide to Coaching*, Executive Director Josh Elkin writes:

*Coaching is a process that supports leaders to make more conscious decisions and take more effective action. Through coaching, leaders and their schools gain access to expertise and, perhaps even more importantly, provide themselves with a structure and perspective from which to improve practice. Coaches help school leaders build capacity to develop and realize the strategic objectives for their schools.*

The survey asked respondents to indicate whether they had contracted with and paid for executive coaching, or if they received coaching services on other terms. The use of contracted and paid coaching is an indicator of a school's commitment to support their top professional leader as well as a leader's commitment to access supports and tools

essential for success. With a response rate of 50% (representing 233 schools), PEJE learned that 45% of heads accessed coaching under a variety of arrangements, and 61% of that group (63 heads of school) received contracted, fee-based coaching.

To further investigate the all-important impact of the coaching experience, the survey then asked respondents to rate the progress made toward their primary goal. The results are telling: heads who received contracted, fee-based coaching—64% of the total—were more likely to report substantial improvement than those who received coaching under other terms (that is, without a written contract and without having paid for coaching services).

## Boards

### COMMITTEES ON TRUSTEES

PEJE surveyed schools on the strategic practice of having a Committee on Trustees (CoT). According to BoardSource, a best practice for CoTs is for its members to meet at least three quarters of the year and to complete *all* eight critical functions highlighted in the sidebar.

Says PEJE senior consultant Cheryl Finkel, “Motivated and talented people are the heart and soul of every successful endeavor. A high-performing, year-round Committee on Trustees develops talent that is aligned with the board's strategic priorities. Doing this work right has tremendous positive impact on the school's short- and long-term viability.”

There is no doubt that successful CoTs can lead to stronger fundraising and more effective governance. Yet, our data reveals they may be under-utilized. PEJE received responses from 44% of our surveyed board leaders, representing 169 schools. Of these boards, only 19% (32 schools) have a year-round, fully functioning CoT; 17 schools have a fully functioning CoT but do not schedule year-round meetings; and 39 schools have CoTs that meet year-round but do not complete all eight functions.



## Critical Functions for Committees on Trustees (CoTs)

**Profiling** board needs against a strategic plan or other set of defined goals.

**Identifying** potential board members through a vetting process.

**Cultivating** potential board members by deliberately engaging in conversations about how their skills match the board's needs.

**Recruiting** identified board members and leaders who have been cultivated.

**Engaging** board members (i.e., all board members serve on at least one committee and are active in ambassadorship and fundraising).

**Educating** board members about issues relevant to the mission of the school, and providing necessary training.

**Evaluating** board members' performance.

**Rotating** board members to allow new board members to serve.

Of those schools that do utilize CoTs, the most common practices are *identifying* (87%) and *recruiting* (78%) new board members; the least common were *evaluating* (43%) and *engaging* (60%) existing board members. Not surprisingly, survey results indicated that the same 32 schools with year-round, fully functioning CoTs not

only perform all eight critical functions; they have also worked with coaches in the past. What can we learn from this data? First, that coaching has long-lasting impact and second, that CoTs represent an opportunity for growth. When schools “do this work right” they reap tremendous rewards.

## Boards

### GIVING AND SOLICITING

PEJE surveyed board chairs and development directors on the percentage of their school board members that are both giving *and* soliciting donations, as a measure of their strategic governance. “Soliciting” in this context can mean cultivating or stewarding donors, not simply “making the ask.”

According to PEJE strategy manager Jill Goldenberg, “Strategic board members with their eyes on the future of their school will act as ambassadors in developing a school’s donor base.”

As noted in a PEJE blog last fall:

*Ambassadorship is not unrelated to governance and fundraising; they are inextricably linked. In fact, ambassadorship is the first step. Starting a conversation with an influential community member about the merits of your school fulfills pieces of your other responsibilities. It can be the beginning of a relationship that ensures the financial sustainability of your school, enabling more of the time you spend governing to be spent strategically.*

**Here’s the bottom line: experience, training, and time on the job make a profound difference in the success of a fundraising professional.**

Engaged board members serve their communities in two important ways: by making their school a top philanthropic priority for themselves, and by actively identifying and cultivating donors.

So, how are day school boards doing as ambassadors? Of the 200 responding schools, only 15 (7.5%) reported that the entire board both gave and solicited donations; at 80% of schools, fewer than half of board members both gave and solicited. This data points to a tremendous opportunity for schools to leverage the untapped potential of board members’ passion and connections.

## Financial Stability

### “PROFESSIONALIZED”

### DEVELOPMENT CAPACITY

We asked school professionals engaged in fundraising activities to report on their length of tenure, hours worked per week, and largest gift raised. PEJE’s vision for day school sustainability relies on a professionalized development capacity, and the responses to this survey confirms that trained and experienced development professionals who work more than half time have greater success raising funds and leading campaigns than their peers who work less than half time.

The data painted a vivid picture of development in day schools. Slightly less than half of the respondents indicated that while development work was not their primary role, they were still the person on staff who was most focused on fundraising efforts. Of the dedicated development professionals, 25% were both trained and experienced and worked more than 20 hours per week. (By contrast, only 5% of non-development professionals were trained and experienced.)

The median largest gift raised by trained, experienced professionals working more than 20 hours a week was seven times larger (\$175,000 versus \$25,000) than gifts raised by less trained professionals. Here’s the bottom line: experience, training, and time on the job make a profound difference in the success of a fundraising professional.

Our data also showed that 55% of development professionals (51 people) have been at their current job for fewer than three years. Having a consistent face in the development department is vital. The median gift for those on the job for longer than three years was five times greater (\$200,000 versus \$40,000) than for their counterparts with less than three years experience.

## Enrollment Data

PEJE surveyed school leaders on enrollment figures. We were particularly interested in measuring the immediate impact of the economic downturn that began in fall 2008 on school enrollment.

To that end, we enlisted the help of Measuring Success, whose role was to analyze the enrollment and attrition data we collected in fall 2009 and spring 2010, covering the 2007–2008 and 2008–2009 school years respectively. PEJE supplemented the data we collected with findings from the National Center for Education Statistics and the Day School Peer Yardstick® Benchmark Report.

In the preliminary analysis, Measuring Success found no statistically significant difference between enrollment in 2007–2008 versus enrollment in 2008–2009. Broadly speaking, however, two things are worth noting: (1) elementary schools without a connected high school (i.e., standalone elementary schools and elementary/middle schools) experienced a *decrease* in enrollment; and (2) standalone high schools experienced an *increase* in enrollment.

Do you have ideas why standalone schools diverged in this way? Do these enrollment findings resonate with the reality at your school? We look forward to your feedback. In the meantime, be on the lookout for the next round of PEJE survey results that impact the Jewish day school field.

# Building Institutional Sustainability

Much has been written about the financial challenges facing Jewish day schools. But fewer documents reveal what leaders can actually do to position their schools for increased financial sustainability. PEJE is deeply committed to supporting the day school field with strategic programs to build their financial capacity. In this edition of *Day School Matters*, we feature the acclaimed Leadership and Fundraising Academy (LFA) initiative.

LFA has been designed for successful financial resource development that strengthens schools' governance, professional leadership, and fundraising practices. The LFA was piloted in New York during 2008–2009 with funding from the UJA–Federation of New York.

A full team approach is central to the program's vision. Having worked with Jewish day schools for 13 years, PEJE understands that school interventions with maximum impact require engagement by all key players at a school—board leaders, development professionals, and heads of school. According to Rae Ringel, New York LFA facilitator and president of The Ringel Group, there is tremendous value in this methodology:

*One of the things I appreciate about LFA is its holistic approach to the school. Working with lay leaders and professionals together really affirms and supports that critical partnership. It is not just about the development professional or the head of school; the curriculum takes into consideration the myriad of people involved in a school community.*

In the pilot, participating schools were required to attend five LFA workshops and work with a coach for up to 40 hours over the course of the school year. Not only did school teams succeed in creating sophisticated development plans; they actively engaged board members in the fiscal future of their school. In this way, leaders learned how to create a

vision-based, rather than deficit-based, development plan in the context of their school's multi-year financial plan.

Jennifer Weinstock, team program manager at PEJE, explains the LFA curriculum this way:

*In developing a five-workshop curriculum, we collaborated with the PEJE coaches and the schools themselves to move schools forward with their development efforts. The workshops [were] an opportunity for school teams to integrate their learning into their roles at school—whether that meant practicing a solicitation and gaining the confidence to participate as a solicitor, or understanding the board's role and then planning a board retreat or training.*

Clearly, achieving success is a long-term process, and PEJE is still collecting data from the New York pilot. However, we are encouraged by results to date:

- Eight of the eleven schools have made significant strides with their coaches. Achievements include creating an 18-month development plan, establishing or activating a development committee of the board, creating contracts and a transition plan for the board, conducting a board training, and participating in face-to-face solicitations.
- Schools made marked advancements in increasing board involvement and gifts raised. One school launched its first-ever annual fund, reaching its \$100,000 goal; another solicited eight new board member gifts and increased the gifts of five others; and a third, which had never closed a seven-figure gift, solicited five \$1,000,000 gifts.
- School teams brought their learning back to their schools and boards, opening channels of communication to improve their governance and fundraising practices.

The success of the New York pilot confirmed PEJE's long-standing hypothesis—there is a powerful link

“One thing I appreciate about the Leadership and Fundraising Academy (LFA) is its holistic approach to the school.”

RAE RINGEL  
New York LFA Facilitator  
President of the Ringel Group

between fundraising and governance; and when real partnership occurs in the interest of financial sustainability the outcomes for day schools can be dramatic.

Building on this success, and thanks to the generous support of Janine and Peter Lowy, PEJE collaborated with BJE last March to launch an updated and expanded LFA curriculum in Los Angeles. As noted in this excerpt from a recent BJE newsletter (see [http://www.bjela.org/local\\_includes/downloads/43726.pdf](http://www.bjela.org/local_includes/downloads/43726.pdf)):

*Ten BJE-affiliated day schools were selected to participate in the LFA, enabling them to take part in an 18-month seminar series as well as receiving one-on-one coaching from development professionals. The six intensive LFA sessions focus on topics including board development and fiduciary responsibility, legacy and endowment campaigns, diversifying the donor base of the schools, and strategic planning of short and long-term goals for day schools.*

There is no doubt that financial realities will continue to challenge leaders of Jewish day schools. But PEJE's experience with the LFA reinforces our belief that an appropriate and necessary response, in any economy, is to strengthen and leverage the connection between governance and fundraising. To learn more about the LFA, contact us at [info@peje.org](mailto:info@peje.org).

# Knowledge at Your Fingertips



To schedule your no-cost, one-hour phone call, go to [www.peje.org/#leadershipline](http://www.peje.org/#leadershipline)

## The Leadership Line

The Leadership Line supports Jewish day school leaders who are navigating management dilemmas and provides a forum for personalized and creative problem solving. With extensive experience and unparalleled expertise in leading Jewish day schools, Leadership Line coaches understand that leading takes courage; they are your allies as well as your confidantes.

As one Board Chair attests, “I clap myself on the back for calling the Leadership Line and then hiring the best tool I’ve had throughout my presidency—my coach!”

If you have questions about these topics or have a resource to suggest, fill out a form at [www.peje.org/knowledge/overview](http://www.peje.org/knowledge/overview)

## Resource Referral

Visit the “Knowledge and Resources” section of the PEJE website to find solutions to questions posed by your colleagues in the Jewish day school field. Browse resources on topics including professional leadership, governance, fundraising, financial management, and admission. The section on “Coaching and Expertise” features a newly-launched online listing of vetted coaches who work with Jewish day schools.

## Communities of Practice

Jewish day school professional and volunteer leaders across North America are building bridges and sharing ideas through PEJE’s Communities of Practice (CoP). In each CoP, participants collaborate to generate knowledge and address topics in their phone-based and online discussions determined by their shared needs, interests, and concerns. CoP members build relationships with and spread knowledge to their colleagues across geographical and denominational divides in areas such as Admissions, Development, Financial Management, and Leadership. Recent calls have focused on diverse topics such as integrating new families, stewardship, non-tuition sources of income, and the role of heads and boards in fundraising.

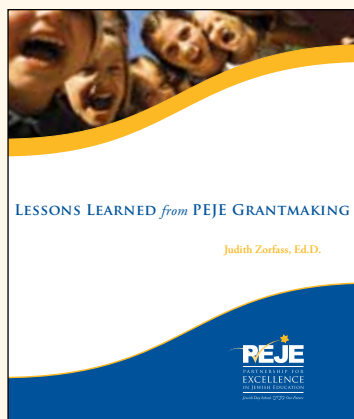


Access PEJE’s Online Coaching database at [www.peje.org/knowledge/expertise\\_and\\_coaching/coachdirectory.php](http://www.peje.org/knowledge/expertise_and_coaching/coachdirectory.php)

We also recommend the revised edition of the *PEJE Guide to Coaching*. See p. 8 for ordering information.

Join a Community of Practice by visiting [www.peje.org/programs/communities\\_of\\_practice](http://www.peje.org/programs/communities_of_practice)

# Order the Latest PEJE Publications



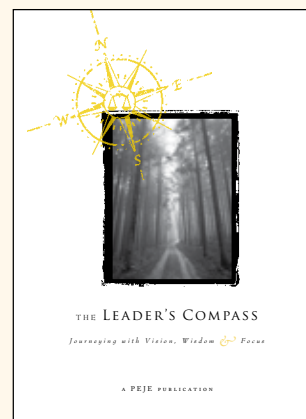
## **Lessons Learned from PEJE Grantmaking**

Between 1997 and 2010, PEJE made 297 grants to over 193 Jewish day schools. In this newest PEJE publication, author Judith Zorfass presents nine key learnings from PEJE's grantmaking experience: theory of change; grant design; the RFP; criteria for selecting grantees; due diligence; relationship building; coach intervention; compliance; and studying impact. *Lessons Learned from PEJE Grantmaking* offers valuable insights to help deepen the strategic thinking of anyone involved in educational funding—Jewish or otherwise.



## **PEJE Guide to Coaching**

Based on PEJE's years of experience with coaching, the revised edition of *PEJE Guide to Coaching* provides Jewish day school leaders with clear and concise information about coaching, enabling them to become smarter consumers. A culture of coaching is an important component of the overall school improvement process, and coaching is a powerful tool that can yield personal and school-wide benefits for administrators, boards, families, and ultimately the children you seek to educate.

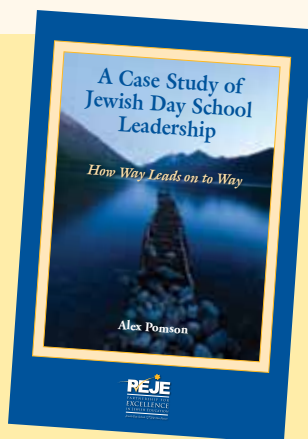


## **The Leader's Compass: Journeying with Vision, Wisdom, and Focus**

In *The Leader's Compass*, we asked a broad group of influential thinkers and practitioners—from both within and beyond the day school field—to respond to 12 provocative quotations on leadership and financial sustainability. The result of that effort is a rich and varied compilation, a perfect gift for donors and board members.

## **A Case Study of Jewish Day School Leadership: How Way Leads on to Way**

We are pleased to announce a groundbreaking publication, to be released on October 24, 2010. Specially commissioned for the 2010 PEJE Assembly, *A Case Study of Jewish Day School Leadership: How Way Leads on to Way* surfaces core challenges confronting Jewish day schools today: how schools can develop productive ways of working with one another and with other communal agencies; how leadership transition can enable the healthy renewal of institutions; how the conditions of financial sustainability might be cultivated in schools; and how day schools can contribute positively to the ecosystems of Jewish communal life. Pre-order this exciting new publication now!



Single issues and bulk orders of all publications are available for purchase at

[www.peje.org/shop](http://www.peje.org/shop)



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