

**From the Outside In: Strengthening Jewish Day Schools  
Through Community and Collaborative Interventions**

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We want to thank everyone, including PEJE staff, who shared their recollections with us, and especially to acknowledge Josh Elkin, PEJE Executive Director, for granting us the time to reflect and write on PEJE's work and for his willingness to be transparent about our disappointments as well as our successes.

## I. Introduction and Context

This paper explores the opportunities and challenges of an approach to strengthening Jewish day schools in North America through collaborative interventions in the community. It is based on the experiences of the Partnership for Excellence in Jewish Education (PEJE), a North American management services and grant-making organization that has piloted a number of strategies to strengthen day schools during its ten-year history. Through a chronological retrospective, this paper details PEJE's experience working with a variety of community organizations—federations, central agencies, foundations, non-profits, and donor groups—to strengthen the environment in which day schools operate. Our goal and our hope is to consolidate our learning to help philanthropic and day school leaders world-wide design more effective community-building and collaborative interventions.

When it began in 1997, PEJE focused on helping to fund new day schools. Starting new schools was the core mission of PEJE for much the same reason that education reformers in the public sector wanted to introduce charters, pilot schools, vouchers and a variety of school choice measures. That is, they hoped to alter the unseemly portrait of complacency, declining quality, and unresponsiveness toward a growing population of underserved families.

PEJE expected that new schools would tap into an unmet demand for day schooling, and in some instances, would be inclusive across denominations and thus attract new families to day schools. Additionally, outside of PEJE, there were some among the day school start-up reformers who realized quickly that an infusion of new schools would force some much-needed self-correction within the existing day school market, that competition--“a rising tide” to quote a past U.S. President—“would lift all boats” and force schools to be more responsive and to improve quality. A key difference between the public and day school reformers, however, rests with their goals: the public school reformer aims to improve student performance and close the Black-White achievement gap; the day school “renaissance-maker” aims to increase numbers of students, donors, and dollars brought into the day school economy because the impact of day school education is so positive. Thus, the new Jewish day school is not focused on individual student performance outcomes but on larger communal objectives. The creation of new Jewish day schools is a pivotal--but not the only—link in the Jewish philanthropist's logic model for continuity and for a more vibrant Jewish future.

To execute the day school “renaissance,” PEJE articulated a theory of action: all coaching activity and grant-making would be designed intentionally to strengthen the “tripod” relationship among the school's mission/vision, the head of school, and the board chair. However, PEJE's Executive Director, Rabbi Joshua Elkin, understood from his own experience of 20 years as head of a Boston-area day school that PEJE could not help schools achieve high quality or sustain themselves over time if we worked exclusively with the individual school, that is, “from the inside out.” Pre-dating Malcolm Gladwell's *The Tipping Point*, Elkin understood the potential power of thought leadership and believed that schools could not survive without a tidal change in attitudes and level of financial supports from the broader Jewish community.<sup>1</sup> At the same time that PEJE was developing grants and coaching programs to support school leaders, Elkin

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<sup>1</sup> Malcolm Gladwell. *The Tipping Point: How Little Things Can Make a Big Difference*. New York: Back Bay Books/Little, Brown, and Co., 2000, 2002.

believed that--healthy tripod relationships notwithstanding—it was essential to build support within the community to advocate for and fund day schools. In his words, “we challenged school leaders to make a serious investment in building a collaborative relationship with other institutions and organizations in the broader community.” As an organization devoted to making each day school strong, PEJE was reminded through experience about the importance—if not the necessity--of working to strengthen schools from the outside in, as well as from the inside out.

Our paper is informed by several data sources. We reviewed archival materials, primarily notes from staff planning and evaluation meetings as well as minutes of PEJE board meetings and working groups during 1999-2006. Second, we reviewed reports of research conducted under PEJE auspices by Barry Dym, Francine Jacobs, and Marcia Jacobs that aimed to identify the threats and challenges to brand new schools entering a community “system.” We also drew from a 2005 third-party evaluation of our Consortium Grant program.<sup>2</sup> Using a single interview protocol, we conducted 14 interviews by telephone and in person with individuals representing day schools, federations, central agencies, and PEJE staff who were involved first-hand in at least one of the forays where PEJE began to attempt work at the community level:

1. Pilot Communities (1999-2002)
2. Mobilizing Influential Leaders-- PEJE Leadership and Donor Assemblies (2000-2004)
3. Community Integration Study (2002)
4. Consortium Grant (2004-2005)
5. Current Strategies

The objective of this research is to address questions that may inform others looking to influence day schools from a community perspective. From our reflection and analysis of PEJE’s experience, we aim to share some conclusions in response to the following questions:

- What are the key leverage points to maximize community-wide involvement on behalf of Jewish day schools?
- What are the recurring stumbling blocks to successful collaborations or activities to be avoided?
- What can outside funders do to stimulate an environment that supports day school growth?
- What are the realistic expectations of collaborative efforts in multi-school communities?

## **II. Pilot Communities 1999-2002**

In 1999, after functioning exclusively to help found new day schools, PEJE began to use language like “advocacy” and “philanthropic leadership” to express its desire to influence the environment surrounding day schools. The organization considered ways of working at the community level to build a donor base and boost enrollment. PEJE selected two communities for intensive involvement. The venture was experimental; in the words of Herb Tobin, the PEJE consultant who led the advocacy efforts, “we didn’t really know what was going to be successful, so we tried a multi-pronged attack.” The working hypothesis was that federations

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<sup>2</sup> Shani Bechhofer, Ph.D., Principal Evaluator, “Evaluation of PEJE Consortium Grants,” JESNA- Berman Center for Research and Evaluation in Jewish Education, May 2005.

could be key partners in growing the day school. Herb and Josh Elkin visited 10-12 potential communities and developed a working understanding of community readiness. (See Appendix “A First Cut at the Criteria for Selecting Cities for the Advocacy and Philanthropic Leadership Initiative”). They selected Milwaukee and Boston as the two pilot communities.

#### *Milwaukee:*

Milwaukee was chosen first using enrollment and philanthropic criteria: about one-third of the eligible Jewish children were enrolled in day schools, and federation allocation to day schools and funding from the community foundation in Milwaukee exceeded national averages. The goal of the Milwaukee pilot was to work with the three elementary schools in order to consider what kind of growth was possible in a community already very supportive of day schools. The initiative had three objectives: to raise funds, improve instructional excellence, and promote day school in the community. To increase local fundraising and stimulate an endowment and capital campaign, PEJE subsidized half the cost of a development professional seated at the community endowment who would work exclusively for the day schools. Herb Tobin provided additional fundraising consultation. To facilitate progress towards educational excellence, PEJE provided 80% of the funding for a senior educational mentor, with the schools contributing the balance. In the area of advocacy, PEJE provided a senior marketing consultant. This resulted in a marketing seminar for each of the schools as well as a joint marketing advertising campaign (see Appendix for samples of the ads).

Tobey Libber, then Planning Director for Milwaukee Jewish Federation, described the eagerness with which Milwaukee responded to PEJE’s intervention: “It was like the Olympics coming to your town. The federation wanted to do it because it was a shining moment and opportunity for Milwaukee.” Libber reflected on the turf issues and trust that took weeks and weeks of meetings to build among the various day school leaders in order to take on collaborative work. He also cited the need for a good match between the outside expert and the local players. The schools found PEJE’s marketing consultant a poor fit and replaced him with a local professional. “The ad campaign was successful because it got the schools to cooperate,” said Libber. The capacity of the schools to realize tangible results, however, was limited. “The idea of approaching a donor to give \$100,000 to all the schools was beyond them,” he said.

The PEJE initiative was the first attempt in Milwaukee at collaboration and cooperation with federation. While the ad campaign was successfully undertaken, it took time for schools to build their own capacity. By February 2002, one school had hired a director of development and another school had set aside funds for the same purpose. The third school was struggling. The schools did not see a significant increase in enrollment. According to Libber, the initiative ended, “not for lack of effort—Herb analyzed the community and said it was as far as this community can go.” A particular challenge the collaborative enterprise faced was that when schools had leadership turnover, the new people were not bought in to the collaborative work. “After PEJE left,” said Libber, “we slipped back into competition. What we should have done was to teach each school individually how to raise money.”

#### *Boston:*

When PEJE was considering which communities to fund for a pilot program, Boston was experiencing a growth in the number of day schools, having added a community high school, a

community elementary school, and a Reform school all in recent years. The federation, Combined Jewish Philanthropies (CJP), was about to launch a \$300 million community capital campaign, with \$100 million earmarked for capital and endowment funds for Jewish education, especially Jewish day schools. In addition to being in PEJE's "back yard," Boston was a natural fit. The goals of the pilot project were to increase enrollment, to achieve the fundraising goal of the community campaign for day schools and break into the \$10 million+ level of giving for day schools, to make the case for day schools to a broader audience, and to double funds raised annually by each school. PEJE partners were enlisted to help secure lead gifts for the CJP campaign. PEJE paid 50% of the expenses for a senior level fundraiser at CJP to manage the Jewish education component of the community campaign and to serve as a liaison with the schools. As in Milwaukee, PEJE supported a consultant to provide marketing expertise.

Barry Shrage, President of CJP, has been a strong day school advocate throughout his tenure. "It is pretty simple," he said, "Jewish education is a priority, and CJP is very engaged with the day schools." The federation faced a number of simultaneous capital campaigns, and it made sense for the federation to become involved. Said Shrage, "Bringing people together in philanthropy, we'd better be part of it."

According to PEJE Board notes, the fundraising objective in Boston was more successful than the enrollment goal. By October 2001, 10 schools had raised over \$66 million for capital/endowment needs, "far greater than if day schools were working independently from each other as well as apart from CJP." However, enrollment did not see the same kind of increase. Participants in the venture point to the limitations of working through a large bureaucracy like federation. The timetable for a community capital campaign extends beyond the urgent timetables of day schools. The ultimate cessation of the program was attributed to the challenges of the designated CJP employee in fulfilling multiple roles (working on behalf of the day schools, integrating the larger federation campaign) and the limited success of the federation campaign. Raising two-thirds of the stated campaign goal for day schools was a positive outcome in a challenging environment.

The Pilot Communities initiative was discontinued in 2002. Because there was no formal analysis or evaluation, there are few documents that interpret the impact of this strategy. In retrospect, the timeline for achievement of milestones did not meet the standard for achievement and rapid turnaround to which PEJE was accustomed in its work starting new schools. According to a Board update, "the initiative's first year in both communities has shown several limitations in a 'top down' approach."<sup>3</sup> PEJE's leadership concluded that the organization's most effective strategy was to intervene directly with individual day schools. Elkin and Tobin drew from the experiences with these cities that PEJE's point of contact should always be with schools themselves, rather than with the central agency or federation.

*Empowerment of individual school leadership is the manageable leverage point. The more connected those leaders are to their counterparts in other schools, or leadership in federation, synagogues, other agencies, the more success you'll have.<sup>4</sup>*

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<sup>3</sup> Board update materials, October 15, 2001

<sup>4</sup> Interview with Rabbi Joshua Elkin, Executive Director, PEJE, April 18, 2006.

At the same time as PEJE confirmed that “the point of entry has to be the school,” there was also a growing awareness that school leaders must be coached to be proactive about building community relationships. In the words of Tobin, “you can’t just go to the school and reinforce the behavior of putting blinders on.” The school must learn to communicate with key community leaders.

### **III. Mobilizing Influential Leaders—PEJE Leadership and Donor Assemblies (2000-2004)**

Concurrent with the Pilot Communities, PEJE began to mobilize and convene major donors of Jewish day schools. PEJE’s strategy was to broaden support for day schools by stimulating day school donors to catalyze influence on their communities and the communities’ goals. Individuals who made gifts of \$100,000 or more to a day school in the previous three years were invited to the first Donor Assembly, held in September 2000 at the magnificent Westchester, NY estate of PEJE Chair Michael Steinhardt. The task of gathering names and contact information for these donors from schools was arduous. The inaugural Donor Assembly, which attracted 250 major donors, would represent PEJE’s biggest investment beyond its original “new school” grantees. Seventy-two schools were represented by major donors in September 2000, but only eight were PEJE grantees. The fact that this first event drew such a large number of major donors revealed the potential of a significant number of empowered individuals to exert influence in their communities. Said one PEJE Board member after the event, “The real work is how to leverage this group into a sustained community of leaders that we can work with.”

A subsequent Donor Assembly in October 2001 maintained the momentum (despite a turnout of 220 that was significantly affected by the atmosphere immediately following the 9/11 tragedies) and delivered more substantive content to participants, especially in the area of fundraising. But it was the third Donor Assembly, held in Los Angeles in February 2003 that truly mobilized the donors and gave them tools to initiate community-level activity. This Donor Assembly was immediately followed by a Leadership Assembly, which attracted over 400 day school and other Jewish community leaders. For the first time, donors were charged with the task of advocating for day schools in their home communities. Promotional material was explicit: the Donor Assembly was about “launching a campaign for increased day school support” and the Leadership Assembly’s theme was “building collaborations of excellence and support for the day school enterprise.” Bringing together allies from communities at the Assembly and providing donors (as well as some leaders who were in attendance on the overlap day of the event) the chance to meet in regional groups was a programmatic innovation. The environment was structured to encourage collaboration, and individuals brainstormed strategies to implement in their home communities. One participant who had attended each of the Donor Assemblies said of the February 2003 event:

*By the time we were in California, the Donor Assembly had been established as a place where you could have real substantive conversation: great minds, time to sit down and think things through. It was not just a dog and pony show, but a real working session with a to-do list.*

The increasing popularity of national events to mobilize day school leaders revealed that PEJE had found an important leverage point. Through the Assembly, PEJE challenged donors and

other influential community leaders to see themselves as part of a larger field and return to their communities to begin collaborative work. As PEJE evolved from working exclusively with new schools to the entire field, the Donor Assemblies served as an effective vehicle to expand our reach to leaders and to empower them through connections. Several of the donors who have initiated subsequent regional advocacy work point to the Donor Assemblies as their primary stimulus:

*I was blown away to learn that there are others who care about day schools, and I made sure that at the next Donor Assembly, there was a representative of each of the schools in my area.*

*[Name of donor] came running to me with the idea, “don’t you think we ought to be able to convene the local donors?”*

During the February 2003 Donor and Leadership Assemblies, PEJE shared with participants a draft version of a national case statement brochure and ad campaign calling for support of day school education. Having made a significant investment in the research and design for these advocacy materials intended for community adaptation, PEJE senior leadership took the opportunity to share the preliminary materials and solicit feedback. But the clear message from those in attendance was that such national messaging would be of limited use in their own communities. Donors persuaded PEJE staff that making the case for day schools with photographs and taglines was very community- or school-specific and should be done at the local level. Staff deferred to the wisdom of the donors, and the project was abandoned. PEJE still references this experience whenever ideas surface to plan a national marketing campaign; we recall the lesson that each community is unique and needs to craft its own messages to reflect local preferences and concerns.

In contrast to the Pilot Communities, working with donors was an organic way to stimulate day school change on the community level. With new schools, PEJE propagated the essential value of the tripod: head of school (professional leadership), board chair (lay leadership), and vision. Working with donors was a way for PEJE on the national level to leverage the lay leadership perspective and influence. In addition to being major supporters of their school(s), these donors were the “movers and shakers” at their local federations and central agencies. Through the Assemblies, PEJE acknowledged major donors as essential partners for community-level change.

### **III. Community Integration Study**

While we were experimenting with community-level interventions, staff were actively implementing the organization’s original Challenge Grant Program to support the creation of new schools. Our mandate from partners was to be entrepreneurial, take risks, and reach out to a previously underserved population, but at the same time to do no harm! Staff were well aware that some schools were having great difficulty becoming integrated into their communities. We wondered why some communities appeared to move forward and others seemed very stuck. We were dismayed with reports that rabbis in some of the new “community” schools were being threatened in a variety of ways, and we wondered what strategies PEJE should employ to help these schools integrate more smoothly.

Our first step was to attempt to understand the dimensions of the “integration” problem. Toward that end, we commissioned Work-Wise Consulting to investigate the factors that promote or impede a new school’s integration into a community, the Community Integration Study (CIS). The CIS was not truly a *programmatic* intervention; we embarked on the study to learn about the *process of integration*.

The research focused on four cities, using Boston as our pilot: Chicago, Columbus, Philadelphia and Phoenix. Dym and his colleagues conducted on-site, personal interviews with 57 informants from these five communities between January and April 2002 and produced a report to PEJE that July. As the researchers explained, PEJE understood that new schools are introduced into a

*complex ecology of existing Jewish educational options (day schools, supplementary schools, boarding yeshivot), Jewish communal institutions (for example, the local federation), communal funding priorities, local public and private school options, and the city’s Jewish and general zeitgeist. Each of these contexts influences the ultimate shape of the developing school and affects its ability to survive and become well integrated.*<sup>5</sup>

The findings from this study were rich in scope and detail. Whereas critics of the new school ventures have charged that they *create* tensions, in fact, the CIS study found that the new school ventures just help bring them to the *surface*.<sup>6</sup> Just as public school reforms generated debate about perceived threats to the new distribution of power, resources, and authority (e.g., NCLB, IDEA, charters, vouchers) the new day schools also provoked disequilibrium, bringing to the surface old and new tensions.<sup>7</sup> Indeed, there is nothing like starting a new school to bring out all the religious fissures, social conflicts, and political cleavages that exist in a community. Dym and his colleagues concluded that communities where integration has been successful share three characteristics: 1) the degree to which power is consolidated in the Jewish community, 2) the existence of leaders to maintain direction and sustain energy, and 3) having a history of collaboration across groups. The report recommended that PEJE:

*Encourage collaboration through funding strategies. Make certain funding streams available only if several groups are willing and able to get together to build larger systems: high schools; elementary and middle school systems with shared resources, and so forth.*

The CIS report clearly encouraged PEJE to fund activity that would encourage community collaborations and address the “pipeline” issues, namely, building K-12 systems in communities.<sup>8</sup> In addition, the report recommended that PEJE work with federations and other

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<sup>5</sup> Barry Dym, Marcia Jacobs, and Francine Jacobs, “The Community Integration Project: Final Report to the Partnership for Excellence in Jewish Education,” July 2002, pg. 6.

<sup>6</sup> Dym, et.al., pg. 25.

<sup>7</sup> NCLB is Public Law 107-110, the *No Child Left Behind Act of 2001*; IDEA is Public Law 015-17, *The Individuals with Disabilities Education Improvement Act*.

<sup>8</sup> Although the CIS recommendation was probably not the primary impetus for a pipeline grant program, the recommendation confirmed the prevailing understanding that to build a day school system, we needed to find ways to retain the low-hanging fruit [keeping families already in the day school system] by plugging the leaks in the system and focusing on admission and retention.

organizations in addition to schools, possibly undertaking projects where there was mutual interest, such as joint marketing ventures, teacher training, technology projects, and joint purchasing initiatives. However, the report was completed just as the Pilot Community experiment was generating a lesson about the complexity of such joint ventures with federations.

The CIS confirmed PEJE's experience that the community played a considerable role in the development of day schools, and it made eight research-based recommendations. The fact that we focused on two recommendations (build the pipeline, and generate collaborative activities) probably resulted in our undervaluing other key findings that might have helped us to avoid pitfalls in our future work with communities.<sup>9</sup>

## **V. Consortium Grants**

Several factors propelled PEJE to launch a Consortium Grant program in the summer of 2003. In the wake of our five-year strategic planning process that summer, we were challenged to revise our program goals. Whereas our founding mandate was to increase the number of *new day schools*, our revised mandate was to increase the *number of students enrolled in new and existing* day schools. Thinking strategically, this meant that we would give preference in the future to schools where the demographics looked favorable. The consortium idea also grew out of evolving experiences where a collaborative group flamed (and then later fizzled), but had great promise at the time to deliver a coordinated approach to community advocacy with a large consortium of day schools.

The shift of focus from starting new schools to working with existing schools suggested to us that supporting and working with groups of schools (i.e., consortia) might be the highly leveraged approach we were looking for. Staff also believed that it would be more efficient to work with multiple schools in close geographic proximity and cheaper to deliver coaching supports in group settings rather than with individual schools. Further, the CIS study had explicitly recommended it.

Our goal was to stimulate collaborative engagement among the schools in order to promote advocacy for day schools or to build the pipeline. We would award one-year grants to communities whose applications proposed either the advocacy or the pipeline agenda. With the Pilot Communities experience very fresh, we were intentional about how the funds should flow. We constructed a "lead school" concept, disbursing the cash component of the grant to a single school that would then be responsible for organizing meetings and moving the project along. A coach would assist the collaborative work, and a modest cash grant would be made to help implement the project. There were no guidelines about how the cash was to be spent or what the coach was to do beyond helping to facilitate the emerging advocacy or pipeline goals.

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<sup>9</sup> Among the key findings: a) Jewish communal life mirrors the ethos of its host city and can be classified by types: a top-down powerful federation reflects the powerful "Daley style politics" in Chicago; Philadelphia, the "city of brotherly love," was the first community to open a trans-denominational high school; and two university towns (Boston & Columbus) were the sites of two day schools that embrace pluralism; b) competition forces action to survive, to weed out schools that no longer serve demand, and to force dialogues (internal and external); and, c) new day schools progress through predictable developmental stages: threat/anxiety, good riddance/no problem, renewed threat and anxiety, community disequilibrium, identity clarification/renewed strength, equilibrium, and d) the need for a middle-school strategy towards a K-12 system to strengthen the pipeline.

As staff worked to implement the grant program, it immediately became clear that the selection process had overwhelmed both the schools and PEJE staff. Each application combined separate forms from each of the participating schools, numbering as many as 10 separate school packages in each application. Four communities were awarded consortium grants, representing 10% of the total allocation for grants in 2004.<sup>10</sup> From the outset, the program officers monitoring the grants reported difficulties on the ground: slowness in selecting a coach; poor compliance in reporting to PEJE; insufficient communication within consortia; and denominational differences that undermined collaboration. In fact, it took months for some groups to reach consensus on the vision for the consortia, essential in order to select a coach. Some schools were disappointed with the level of the cash grant award and made their disappointment apparent to their grant officer. Very quickly, PEJE understood that the Consortium Grant was a high maintenance program.

At the end of the first year, PEJE commissioned Dr. Shani Bechhofer at JESNA to conduct an evaluation of the Consortium Grant program. The evaluation report confirmed and elaborated on our anecdotal experience. This persuaded staff and partners in the summer of 2005 that “while the approach didn’t actually fail, there are just better ways to leverage our resources.”<sup>11</sup> So, instead of a planned increase to 40% allocation to community grants in May 2005, PEJE determined by August 2005 to halt future awards to consortia as soon as current obligations were met. In words best summarized by a staff member in conversation with the partners’ Work Group during August 2005:

*PEJE has learned that it can be challenging, cumbersome, and messy to launch these community initiatives... The group agreed that, as an organization, PEJE has the most to offer in the area of convening and follow-up...and they supported this shift in direction. There was consensus that the Work Group recommend to the board that once the existing community grants commitments are complete, the grant program cease to make community grants.<sup>12</sup>*

In retrospect, PEJE’s shift in organizational strategy in 2003 required a different approach to program design and outcomes thinking. The success indicator for PEJE until 2003 was clear: number of new day schools opened in North America. The strategic plan called for more complex activities in existing schools leading to increased student enrollment. Although we had certainly applied some of the lessons from our recent experience (Pilot Communities, CIS), we probably did not sufficiently articulate a set of measurable objectives or a logical flow of the several types of activities that might be linked to enrollment growth. Supporting consortia simply seemed like a very good idea, and the plan was consistent with our long-range enrollment goals. Moreover, it responded to the advice of our commissioned research to encourage local collaborations and build K-12 systems, and it promised some efficiencies. We asked ourselves what short-term goals to be looking for (“was evidence of schools meeting together enough?”). Although we agreed that “collaboration for the sake of collaboration” was not the answer, we didn’t lay out the intermediate steps, or a set of expectations and protocols for coaches who were

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<sup>10</sup> The consortium grantee communities were: Atlanta, Boca Raton, Teaneck and Denver.

<sup>11</sup> Interview with Linda Mann Simansky, Senior Program Officer, PEJE, April 18, 2006.

<sup>12</sup> Notes from PEJE Grants Working Group discussion, August 2005.

to shepherd schools through the process. Unfortunately, as the Consortium Grant program unfolded in the first year we didn't see sufficient evidence across the sites that leaders were meeting with each other or collaborating, despite the consistent dedication, good-intentions, and efforts from our coaching consultants.<sup>13</sup>

In short, although PEJE had been thinking strategically, we missed some important details. “We went where we wanted the bees to buzz,” and while it was good to be strategic about selecting communities where there was potential for enrollment growth, we failed to account for other important factors of community readiness.<sup>14</sup> Lessons we have learned from our foray into community work:

- Schools and community groups must have a track record and history of successful work together prior to funding any collaborative effort. Perhaps the promise of some unrestricted cash support lured schools with no previous history of collaboration, and they came together only to benefit from the grant. According to other, more experienced grant-makers, this is a recipe for failure.<sup>15</sup>
- Communities are unique and a one-size-fits-all grants approach may fail to recognize those differing needs. A more flexible approach that offered cash to some and management services to others might have been more successful. The Consortium Grant was offering a commodity that not everybody needed or wanted.
- Significant financial resources are required to get collaborative initiatives off the ground. Some communities knew that what they needed was not the coach, but the cash that would enable collaborative activity.
- Any future collaborative work in communities should attempt to engage schools in areas of common need, rather than imposing the PEJE agenda. We bit off the most difficult task: encouraging collaboration in multi-denominational communities where there was natural competition among schools for students.
- Strong and seasoned leadership on the ground is essential. Rather than charging a lead school to manage the consortium, it is important to provide some financial support to empower a local facilitator. Because community interventions are “challenging, cumbersome, and messy,” a point person on the ground is needed to keep information

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<sup>13</sup> In one site a coach conducted research that resulted in a “branding” exercise to help schools differentiate themselves in the day school market. In a second site, three schools met periodically with an able coach, but religious divisions prevented system-wide collaboration. The third site failed to select a coach for a year, and are just now beginning to show signs of working together. The fourth site never took off at all and everyone gave up.

<sup>14</sup> Through this reflection and writing process, we have captured Elkin’s “Community Readiness Grid” which PEJE will use in selecting communities for future work. See the Appendix.

<sup>15</sup> David La Piana, “Real Collaboration: A Guide for Grantmakers,” *The Ford Foundation*, January 2001. Also, *The Northwest Regional Education Laboratory, Guide 7, “Fostering School, Family, and Community Involvement,”* September 2002, describes the barriers and challenges to collaboration and notes that “time must be spent developing ‘motivation readiness’ of stakeholders” cited in Bechhofer, 2005, slide 19.

flowing about the consortium work and to ensure that the agenda is pushed forward (similar to what we found in the Pilot Communities). The big lesson about collaborative work in communities is the vital role of lay leaders. In Elkin's words:

*The good news is that it takes a small number—even one or two—lay leaders to make something happen. The bad news is that it takes one or two lay leaders to make something happen. Where are they?*

## **VI. Current Strategies**

PEJE's current work at the community level is structured around the concept of capacity building, providing schools and leaders with the skills and means to take ownership of the changes that will lead to increased enrollment. This means supporting regional advocacy groups in a responsive way (as opposed to setting the agenda and coercing the collaboration into existence), sponsoring regional conferences with post-conference consultations, and using PEJE-sponsored tools like the Day School Peer Yardstick™ to enable schools and communities to make data-based decisions.

### ***Regional Advocacy Groups***

PEJE's Donor Assembly in February 2003 stimulated leaders to initiate collaborative work in their communities on behalf of all local day schools. What this collaborative work looks like, how it is organized and staffed, what the specific goals and activities are, vary within each community. For the purposes of this paper, we interviewed leaders in six communities (Boston, Dallas, Houston, Los Angeles, Southern New England, Toronto), with which PEJE has ongoing and strong relationships<sup>16</sup>. In 2004, the Continental Council for Jewish Day School Education (now defunct) of JESNA compiled a summary report about a number of groups involved in marketing initiatives. The JESNA report advised<sup>17</sup>:

- Marketing tends to be a good issue around which to begin community collaboration.
- It often takes a long time for leaders of schools and other community institutions to feel comfortable collaborating.
- The opportunity to work with a national organization like JESNA or PEJE seems to be an important factor in encouraging schools and individuals to participate in community-based marketing initiatives.

Our interviews confirmed these insights and identified some of the strategic factors that limit or enhance the effectiveness of community-wide activity for day schools.

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<sup>16</sup> There are additional communities in North America where leaders are engaged in collaborative work on behalf of day schools. PEJE is connected to groups that are active in Phoenix, San Francisco, Metro-West New Jersey, Atlanta, Denver, San Diego, and Philadelphia. Several of these groups operate out of the central agency or federation.

<sup>17</sup> "Report on Community-based Day School Marketing," Continental Council for Jewish Day School Education (September 2004).

## Leadership

In communities where the collaborative work is driven by a donor or lay-leader, enlisting appropriate like-minded activists and securing professional staff were described as critical. Many of the communities have steering committees made up of representatives from schools that are also influential leaders throughout the community. According to one donor, “we had to identify very smart people who had some money and were willing to make a commitment to the day school movement.”

Deciding to bring in professional expertise and facilitation helped jump-start the efforts of a group of impassioned but time-strapped volunteers. Finding the right professional is also critical—one community attributes its success to having a seasoned federation professional at the helm (as opposed to the more mid-level professional originally envisioned for the position) who is connected to major donors and able to move in federation circles comfortably. In one community, bringing in an outsider “broke the pattern of going nowhere, frustrating conversations.”

## Changing the culture

Individuals reported that the move to a collaborative model made good intuitive sense, even when it created disequilibrium. Returning from a Donor Assembly, people felt a sense that “we ought to be working together.” There was a shared desire “to develop a greater consciousness and be responsible for the communal conversation around it.” The process of building collaboration is slow, however, in part due to an entrenched sense of competition among schools. Overcoming competition can mean confronting difficult realities:

*The first thing we realized was that in order to have the schools work collaboratively and trust each other, we had to have an open and frank dialogue about recruitment, fundraising, community relations.*

The payoff of collaboration was illustrated years ago in Houston, when schools worked together to solicit funding for an influx of Russian immigrants. “All of a sudden, when schools came together, people gave them everything they wanted.” Once the collaborative process or structure is determined, the work of buy-in and partnership continues, and is complicated by leadership turnover.

## Resources & Activities

By working together, these groups gain access to community resources even more effectively than schools might on their own. Said one leader, “we uncovered valuable resources in the community that we’re able to share among each other.” The groups are engaged in a variety of initiatives, ranging from marketing campaigns to raising funds for an endowment to sponsoring activities for students from all the area schools. Early on, many groups identified the importance of achieving early results to keeping the collaborative afloat. “You need to start with a ‘win-win,’ build trust. Take on something manageable.” Boston identified the market research their group sponsored as a critical tool for proving their value to the schools and to the community at large. “You need some hooks,” a leader said.

### New roles for federation/central agency

In three of the communities, the impetus for collaborative work was initiated through a “top-down” strategy, rather than a grassroots effort from motivated lay leaders. In each case, the federation or central agency responded to a new reality. For Toronto, it was a change in financial realities and community demographics—the federation was no longer able to fund the tuition shortfall schools faced. Additionally, for the first time, enrollments were flat or falling. For Los Angeles, the impetus was crisis prevention, fearing that a lack of expertise in schools would result in inadvertent malfeasance. For Houston, the idea gelled when, as part of the allocations process, each school cited enrollment difficulties. The ability of the federation or central agency to respond to the needs of day schools in collaborative ways reflects the creativity and commitment of community leaders to fulfill a role for the schools beyond the traditional allocations function.

### Role of PEJE

PEJE’s role in stimulating and supporting these groups began at the Donor Assembly. Since the February 2003 Assembly, staff at PEJE have served as a resource to leaders of these groups, advising about potential workshop speakers, sharing research or messages that make the case for day school education, promulgating the value of capacity-building strategies, and convening a Community of Practice of leaders from the various groups. The return on this modest investment has been considerable:

*I can’t underestimate the huge impact of PEJE—facilitating annual meetings where people can share ideas and communicate successes and failures.*

*PEJE has played an amazing supportive role in being a sounding board and bringing people together to learn.*

From PEJE’s perspective, the advantages of close relationships with these groups are obvious: the closer we can get to the schools, the more effective we can be. In the words of the leader of one of the groups, “getting a message from PEJE isn’t enough—schools need to hear it from someone they know, and hear it over and over again.”

### ***Regional Convening***

Expertise—which has been an aspect of all PEJE grant-making and activity from the very beginning—is the core commodity that PEJE markets to the day school field. The delivery of what we are coming to call “wholesale” expertise through regional conferences is a strategy that overlaps with community-level advocacy. Working with central agency or federation leadership, PEJE has co-sponsored a number of seminars in the areas of admission, recruitment, and attrition prevention; fundraising; and leadership and governance. We have collaborated with partners in Atlanta, Houston, San Francisco, Toronto, Los Angeles, New York, among others. These seminars are often followed-up with an offer of post-seminar school consultation, extending the learning from the collective to the individual.

### ***Day School Peer Yardstick™***

The development of the Yardstick management tool to help the field identify key indicators of enrollment growth and to help schools benchmark their own progress on those indicators

involves periodic data gathering by schools. That process adds to the schools' burden of submitting similar data reports to their federations as part of the allocations process. Recently, one federation leader approached PEJE and Measuring Success, the consulting firm that is both the architect and contractor for the project, to consider ways of coordinating data collection. Understanding that streamlining, simplifying, and coordinating data collection was an area where the work of PEJE, the bureaus, and federations intersect has provided us with an exciting challenge and opportunity to help day schools and Jewish communal leadership. Working toward a single data collection form and a coordinated calendar for collecting the data is a potentially powerful strategy for a quadruple win-win-win-win: for the schools, for the federations, for the bureaus, and for PEJE. Data collection will be easier for schools, federations and BJE's will have the benefit of PEJE's expertise and data analysis, and PEJE will benefit from the federations' leverage over allocations to collect data from the schools.

## **VII. Conclusions**

PEJE has always enjoyed a culture of evaluating and reflection, making mid-course corrections toward the improvement of programs. In the course of preparing this paper, we have brought to light a number of instances where our strategy might have been more successful had we taken stock of what we already knew before tackling a new initiative. This tendency may be endemic to non-profit organizations, and, somewhat ironically, it appears to be prevalent in the world of education. Educational leaders, eager to uncover the "next great thing" that will turn the tide, are particularly vulnerable to community and societal pressures to change direction abruptly. Adapting the discipline to review what is known and then to consider appropriate actions, as opposed to reacting to external pressures, is a lesson of value. It is very difficult to be both nimble and thorough, rational and responsive. At PEJE, although we have learned not to keep our learning in silos, we are still discovering the importance of routinizing effective knowledge management techniques essential for establishing the feedback loops that enable successful program design.

We opened this paper with a series of questions, the pursuit of which directed our reflection on PEJE's various attempts to influence day schools at the community level, from "the inside out."

### **1. What are the key leverage points to maximize community-wide involvement on behalf of Jewish day schools?**

First and foremost, the right leadership—lay and professional—plays a determinative role in the success of any community-level intervention. This means securing the buy-in and influential lay people from the schools and other community institutions like federation, as well the active and cooperative participation of school professionals. Often, one or two impassioned and committed leaders can make the difference between success and frustration. The facilitator of group collaboration must be a talented individual who can build trust among the participants and who can lead them to identify and express the common interests and benefits to accrue for all parties.

Additionally, having a common goal that emerges organically, when it is already an area of concern to all schools (such as the need to serve the influx of Russian immigrants in Houston or developing a common data collection form), is an opportunity to pursue collaborative endeavors.

The goal or common problem around which schools are already rallying is an undeniable leverage point.

## **2. What are the recurring stumbling blocks to successful collaborations or activities to be avoided?**

National messaging will have limited value. Advocacy on the national level depends on customization for each community, and perhaps for each school. Be wary of the trap that one message will work across the board.

Imposing an external agenda is likely to yield poor results. Instead work where “bees are buzzing,” where the schools are already sharing a need or interest.

Collaboration that is stimulated exclusively by the “carrot” of a grant is usually unsustainable and will likely disintegrate quickly.

Lack of sufficient start-up funds will seriously impair development. Bringing in a consultant or outside facilitator requires an entrepreneurial investment.

The stamina and capacity of leaders for collaborative activity is limited. Communal leaders are accustomed to promoting their own agendas more than working in collaboration on behalf of one educational venture<sup>18</sup>. Patience is rare and skepticism rampant.

Leaders with conflicting responsibilities can torpedo the collaboration. The facilitator should be focused and dedicated to the common objective.

## **3. What can outside funders do to stimulate an environment that supports day school growth?**

Early on, create win-win situations for collaborative groups that all parties can value. This gives collaboration and community-level initiatives the reputation of excellence and worth. Boston’s Market Research study delivered a useable commodity that opened the door for further work. Invest where there is common interest.

Make available opportunities for local leaders to get together, even informally. If a funder can host a gathering of leaders that share an interest in day school education, even if they come from varied backgrounds, real relationships can be developed that will lead to cooperative work. Convening individuals who *should* know each other but don’t, can help build the trust that will lead to collaborative activity on behalf of a common concern.

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<sup>18</sup> Jack Wertheimer, “Linking the Silos: How to Accelerate the Momentum in Jewish Education Today,” *The AVI CHAI Foundation*, December 2005. This report offers interesting suggestions for building a community vision for Jewish education across different educational venues.

Promote the ideology of day school education that unites disparate parties, and provide information that is useful and consistent with the day school vision across denominations. Keep people believing in the values that all day schools provide, regardless of denominational or other differences.

Empower the schools and school leaders to adapt or implement the initiatives of the collaborative. Make sure that schools have the resources, such as appropriate personnel, to build on the community-level activities.

#### **4. What are the realistic expectations of collaborative efforts in multi-school communities?**

Expect some degree of distrust and competition, especially at first, and know that change is going to take longer than you imagine.

Schools and communities are unique; in any given community, schools will follow their own trajectory of institutional development. A good facilitator can mediate these differences and broker agreement on a common strategy, approach, or project. Communities themselves, as the CIS study showed, possess distinctive “personality” styles that require awareness of and responsiveness to the unique community’s ethos.

Collaboration is fragile. With frequent turnover of both professional and volunteer leadership at so many schools, the task of creating and preserving “buy-in” never ends.



Although the heyday of new day school start-ups may have passed, the good news is that we may be beginning to reap the benefits of a more competitive marketplace for Jewish schooling. Having passed the initial adjustment period, we may now be entering a calmer phase where school leaders are fast at work figuring out how to gain market share by providing the most value to Jewish families and children, particularly families who in earlier times would never have considered day school education. We are witnessing a crop of major gifts to day schools,<sup>19</sup> and leaders in Boston are not hesitant to point to the ongoing collaborative efforts as having contributed to an environment in which the landmark \$45 million Peerless Excellence project has emerged.

While there have been a few school closures, the latest school census reports modest increases in student enrollment.<sup>20</sup> In the coming year, PEJE will be developing a new Yardstick product to help schools benchmark their progress on achieving customer satisfaction, and PEJE will expand the number of regional seminars as we continue to support and connect regional advocacy groups. As PEJE presses forward in this direction, we expect to see evidence of improved quality and satisfaction, and, ultimately, an enrollment that is greater than it would have been

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<sup>19</sup>See Chanan Tigay “As Day Schools Rake in Mega-gifts, Some See a Trend in Jewish Giving,” *Jewish Telegraphic Agency*, May 9, 2006.

<sup>20</sup>Marvin Schick, “Census of Jewish Day Schools,” *The AVI CHAI Foundation*, January 2005. The Schick report is based on enrollment figures from 2003-2004.

without the PEJE investment. Community-level intervention, which by definition takes different forms in different communities, offers the opportunity to align the vision for a community's future with real, on-the-ground initiatives that promise impact in terms of enrollment and financial well being. Spreading the gospel about the value of this approach, perhaps the following story will become a distant memory:

*A federation leader was visiting another community. His colleague reported to him, "We're in mourning." "Why?" asked the visitor. "One of our day schools just got a \$5 million grant, and we didn't." The visitor was dumbfounded. "Your whole community should be celebrating! We have to be partners in building the kind of communities we envision."*

## **Appendix**

“A First Cut at the Criteria for Selecting Cities for the Advocacy and Philanthropic Leadership Initiative” (August 1999)

“Community Readiness Grid” (April 2006)

Interview Protocol (April 2006)

Ads placed in Milwaukee—hard copies to be shared at conference

### *List of Interviews:*

Rabbi Joshua Elkin, Executive Director, PEJE, April 18, 2006

Naava Frank, former PEJE Senior Projects Manager, Officer, May 7, 2006

Miriam Prum Hess, Vice President, Jewish Federation and Director, Day School Operational Services, Bureau of Jewish Education, Los Angeles, CA, April 25, 2006

Elaine Kellerman, Executive Director of Bureau of Jewish Education, Houston, TX, April 24, 2006

George Krupp, Chair, DAF/Day School Advocacy Forum, Boston, MA, May 3, 2006

Tobey Libber, Program Officer, The Helen Bader Foundation (formerly Planning Director for Milwaukee Jewish Federation) Milwaukee, WI, April 17, 2006

Audrey Lichter, Jewish Day School Consortium of Southern New England, Hartford, CT, April 24, 2006

Jaynie Schultz, Lay Leader, Dallas, TX, April 18, 2006

Barry Shrage, President, Combined Jewish Philanthropies, Boston, MA, May 1, 2006

Linda Mann Simansky, Senior Program Officer, PEJE, April 18, 2006

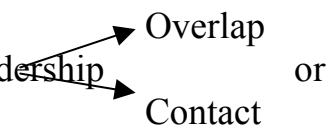
Ilene Sussman, Executive Director, DAF/Day School Advocacy Forum, Boston, MA April 18, 2006

Herb Tobin, Senior Consultant, PEJE, April 11, 2006

Arnee Winshall, Lay Leader, Boston, MA, May 1, 2006

Shirley Worth, Director of Donor Development, UJA Federation of Greater Toronto, Toronto, Ont, April 17, 2006

**A FIRST CUT AT THE CRITERIA FOR SELECTING CITIES  
FOR THE ADVOCACY AND PHILANTHROPIC LEADERSHIP INITIATIVE  
(August 1999)**

1. Federation readiness – both on the lay and professional levels
  - Current day school initiatives – current day school posture
  - Support of local Bureau of Jewish education
  - Synergy with the UJC report on day schools; regional activities (similar to recent Western region conclave held on August 2 in LA)
2. Quality of the day schools in terms of their educational excellence and their capacity to attract discerning prospective parents, readiness for serious F.R.
3. Caliber of the lay leadership and professional leadership of the day schools within the community
  - Intersection with Federation leadership 
4. The availability of prior donors to day schools to serve as pacesetters and mentors
5. Amount of money raised for day schools in the past and the case for current day school needs
6. State of current need for capital funds for all day schools
7. How welcome is PEJE: the concept; the partners; the staff
8. Some communities with PEJE grantees and some without

9. Variety in size and geography of communities
  
10. Personal contacts, built-up trust
  
11. Strength and potential synergy with the Synagogue lay and professional leadership
  - Possible value of day schools housed in synagogues as a useful model
  
12. Expectations of the community
  
13. What would it cost and what would be its cost effectiveness?
  
14. PEJE staff and AVI CHAI knowledge of the community
  
15. Replicability
  
16. Potential for securing additional national PEJE partners
  
17. Presence or likelihood of a non-orthodox Jewish day high school
  
18. Presence of an academic institution as a resource for day school excellence

## COMMUNITY READINESS GRID

*(April 18, 2006)*

After reflecting on PEJE's several community-level interventions, Josh Elkin, Executive Director of PEJE, proposed a protocol of questions that will help predict the likelihood of success in strengthening Jewish day schools through a community-level intervention. The *Community Readiness Grid* identifies a set of key factors within the community to be assessed before beginning a collaborative intervention designed to strengthen Jewish day schools.

Items should include:

- Shared vision within the community
- Continuity of lay and professional leadership
- Track record of collaboration – prior history suggesting promise of success
- Trust
- Local actors on the ground committed to collaboration – some movers and shakers
- Capacity among community groups to identify common needs
- Willingness to devote time and energy to endeavor
- Commitment to share knowledge
- Hospitable atmosphere to outsiders within the region
- Evidence of linkages across the silos – synagogues, rabbis, schools, bureaus, federation
- Willingness locally to commit financial resources

**Name of community:**

**Is there evidence of a shared vision?**

**How many years have the current lay & professional leaders been working together?**

**Is there a track record of collaboration?**

**What evidence is there of trust?**

**Are there leaders on the ground who are committed to collaboration?**

**Is there evidence of a capacity among groups to identify their common needs?**

**Is there a commitment to share knowledge?**

**What evidence exists of linkages between organizations?**

**Are leaders hospitable to outsiders from the region?**

**Is there a willingness to devote time & energy to collaborative activity?**

**Is there a willingness to commit local financial resources to the endeavor?**

## Interview Protocol

Interview Subject:

Date:

Interviewed by:

<b>Context/Background/Goals</b>	
1. What were the components of the intervention?	
2. What was context or background at time of the [intervention] that led you /PEJE to consider a community strategy?	
3. Why did you/PEJE embark on this particular .....project; what was the rationale? What was the particular challenge that [you and] PEJE were/was trying to address? What was the operating belief or assumption that led PEJE to try this approach?	
4. What were the criteria for success? What outcomes did you anticipate (short- and long-term)?	
<b>Results</b>	
5. What were the major obstacles you encountered?	
6. Do you feel that it was successful? Were there successful outcomes?	
7. If not, what were the criteria by which you determined that it failed?	
8. How did the experience (success or failure) get integrated into PEJE understanding? How did PEJE learn from the experience and then adapt?	
<b>Learning/Applications</b>	
9. What is your conclusion from the experience? What are the better leverage points in working with communities to effect change in schools?	