

The RAVSAK Journal

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RAVSAK

The Jewish Community Day School Network  
רשת בתי ספר קהילתיים

# הידועות

HaYidion

חורף תשס"ז • Winter 2007

A close-up photograph of a hand in a blue sleeve moving a black chess piece on a wooden chessboard. The board is in focus, showing the alternating light and dark squares. Other chess pieces are visible in the background and foreground, some in sharp focus and others blurred. The lighting is dramatic, highlighting the texture of the hand and the wood of the board.

# Board Leadership

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# A Word from the Editor

**R**AVSAK’s executive director, Marc Kramer, recently noted how frequently people who are asked to prepare a *d’var Torah* will comment with amazement that the text “speaks to them,” regardless of the timing or subject matter of that text. While we do not claim such miraculous qualities for *HaYidion*, you will undoubtedly find that this issue also “speaks” to you, striking chords that resonate with your own experiences as day school leaders, both professional and volunteer.

As editor of the journal, I am astonished at how frequently a problem with which I am wrestling is, *mirabile dictu*, addressed in *HaYidion*. As my school plans its first Board retreat, an article appears telling how to make it effective. As we think about recruiting new Board members and changing the “climate” of our school, those topics are likewise addressed in RAVSAK’s quarterly publication.

The subject of organizational governance and leadership is a far-reaching one, which has great currency. As Nathan Garber points out in an article published elsewhere, the examination of the non-profit Board’s role “has been driven partly by the experience of the private sector, but more importantly by the changing environment in which non-profits operate. This environment is characterized by: increased competition for Board members; and, increased

need for self-generated income; increased expectations for accountability; increased competition from for-profit services; increased professionalization of non-profit managers.”

The topic of Jewish communal leadership reveals even more challenges. As Hal Lewis, author of *From Sanctuary to Boardroom: A Jewish Approach to Leadership*,



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writes “Mirroring trends that reach across America, today’s Jews are far more comfortable with episodic and intermittent linkages than with traditional forms of affiliation...Today, Judaism has become a leisure time activity, one of the many things American Jews do if they have the time and are so inclined. And even then, only on occasions that suit their needs, temperaments and value systems.”

While this issue of *HaYidion* cannot address all of the multiple facets of the governance discussion, it clearly touches on many of the hot-button topics which are relevant to Jewish education today. We hope you will find this a welcome addition to the tools you use as you forge the future of American Jewry in our community day schools. ■

**Interested in receiving additional copies of this issue of *HaYidion* for your board?**

Contact Robin Feldman, Director of Member Services at [rfeldman@ravsak.org](mailto:rfeldman@ravsak.org)

# From the Desk of Susan Weintrob, RAVSAK President

כי-נבקעו במדבר מים, ונהלים בערבָה.

For waters shall burst forth in the desert, streams in the wilderness. Isaiah 35:6.

**T**he messianic vision that Isaiah foresees includes the blind seeing, the deaf hearing, and the lame not only walking but leaping. And as if that weren't enough, the desert blooms. These miracles are not static but dynamic, enabling the flourishing of *B'nai Yisrael* and *Eretz Yisrael*.

Like many other heads of school, I expect the same phenomena from my trustees, who in turn, expect miracles from me. The only difference between Biblical miracle-making and the work we assign to ourselves is, of course, the budget: G-d can call upon every resource in the universe and more; we, however, generally have to make do with far less.

Humor aside, the volunteer-driven day school Board is entrusted by the community (not to mention the IRS) to lead – not manage – the school. Leadership is a complex matter as we all know, fraught with dilemmas, difficult and sometimes painful choices, and significant burdens. Our Boards are officially charged with the tasks of keeping the school attuned to its mission, setting values-influenced poli-

cies, partnering with the head of school, promoting the school in the general community, and ensuring the school's fiscal viability. This means that the Board must take on the roles of keepers of the faith, policy wonks, marketers, advocates, bean-counters and fundraisers and human resource directors and...and...and...

So how does the typical Board member move from being a school parent or neighbor to strategic planner, fundraiser and head support?

The members of the Board must make Board education and leadership development one of its bedrock issues if they –and in turn, the schools they lead, are to thrive. Supporting the school means creating a culture open to coaching, retreat planning and team building. It means researching best practices in governance and stewardship. It means loyally partnering with the head as he or she administers the school's operations. It means having a long range plan for the Board as well as for the school.

The RAVSAK's Annual Leadership Conference in Houston, Texas is an excellent way to begin or to enhance Board building. The workshops offer valuable steps,

contacts and networks. The conference is a high-value, low-risk venue for personal and professional growth for heads, Judaic studies directors, and Board members alike. All of us need to share our strug-



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gles and successes. More to the point, everyone involved in the leadership of a day school is both obligated and entitled to learn and grow, if not for themselves, then for the sake of the school and the students you serve.

Like waters in the desert, trustees must make their schools bloom. Chaim Weizman once said, "Miracles sometimes occur but one has to work terribly hard for them." In truth, school leadership is not and cannot be about miracles – let's leave that up to heaven- but it is nonetheless, holy work. Struggling, persevering, and working hard together, G-d willing, we will witness the desert and our schools blossoming, as in the words of Isaiah.

I look forward to seeing you in Houston! ■

## **HaYidion: The RAVSAK Journal**

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# Work, Wisdom, and Wealth: Creating New Opportunities for Board Members

■ by Dr. Janice Johnson

“How wonderful it is that nobody needs to wait a single moment before starting to improve the world.”  
Anne Frank (1929-1945)

How right, in so many ways, was Anne Frank – even in the responsibility of day school Boards and Board leadership. This article focuses on three traditional elements of Board service – Work, Wisdom and Wealth – and attempts to illustrate how day school Boards can stretch beyond the expected “3 W’s” to levels that inspire each of us to think about how we can improve our day school world. It asks how we as day schools can move beyond the basic definitions of work, wisdom, and wealth so that we create new opportunities for our Board members – opportunities that create exceptional value and that dramatically advance our mission.

**Work:** Board members work as advocates and ambassadors for the school, serving to enhance its awareness, reputation, and capacity through social and professional events and activities. Board members work to cultivate partnerships and collaborations between others and the school. Board members dedicate their time to further the school’s mission. The school’s Board work is deemed meaningful and important. It is more than attending regularly scheduled Board meetings or making appearances at school events. It is about believing deeply in the school, its mission, its purpose. It involves making the commitment to participate actively, to hold oneself accountable to the success of the school and to believe that the work one does makes not just a measurable difference, but a profound one.

**Wisdom:** Each Board member brings a unique and important set of skills, talents, and expertise that keeps the school aligned to its mission. However, the wis-

dom each Board member brings to the table is more than this. Skills and talents help Boards accomplish goals, but it is the deeper level of Board member wisdom that informs vision. This wisdom is essential in the Board’s role as visionary leaders. The wisdom of each Board member allows the Board to function as one body in charge of the “big picture.” The wisdom of each Board member provides the diversity and inclusion necessary for a comprehensive process that ultimately leads to solid, one-voice decisions.

**Wealth:** Board members actively participate in meeting the school’s financial needs. This includes personal giving, getting, and all aspects of fund raising. Board members have untapped fundraising potential. In addition to traditional forms of giving and getting, we need to ask Board members to think about and explore “outside-the-school-lunch box” ways to produce significantly larger returns on annual giving events, capital campaigns, and endowments. Board members can participate in creating a school portfolio that diversifies and maximizes sustainable revenue sources. Board members should be valued not only for making the school a personal philanthropic priority but also for participating in the school’s fundraising process.

It is our Board members’ passion for our school that turns donors from “outsiders” to “insiders.” As Helen A. Colson explains in her fall 2006 NAIS article, “The Board’s Role in Development,” “an outsider may be aware of a need; an insider is committed to meeting it.” Board members provide potential donors with the passion, the value, the meaning, and the connection. Board members can extend the reach of the school by actively using

their own reputations and networks to secure funds, expertise, and access.

Why is this important? Day school Boards with a reputation of completing meaningful work, providing a wide range of



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wisdom, and gaining sustainable wealth create the passion and support schools need to achieve success. School success is measured by increased student enrollment and financial sustainability. One indicator of Board success is a waiting list of Board member candidates due to a Board’s reputation for doing meaningful work. Stretching beyond the basic “3 W’s” by creating opportunities for passionate, inspirational, and meaningful Board member contributions will increase student enrollment and financial sustainability.

How is this accomplished? As heads of schools, we each need to look inward and ask ourselves to take a reflective and honest look at our relationship with each Board member and ask, “Have I, as head of school, cultivated a relationship and provided the support and information necessary for each Board member to work in the manner described above? Do I model the passion, commitment, and work ethic I aspire for all Board members? Do I actively demonstrate to each Board member that I value and respect the volunteer hours each dedicates to the school?” Heads of schools need to provide a vision of what is possible and a means to

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# Cultivating and Recruiting New Board Leadership

■ by Arnee Winshall

In my last article (September, 2006), I discussed the process of profiling and building a Board and its impact on the success of a new school. However, it is not only when a new non-profit institution is being formed that the Board is critical to its successful fulfillment of the mission. In fact, it may be even more important and a greater challenge as the school strives to maintain its focus and re-invent itself over and over again in pursuit of excellence and its vision.

Recruiting for Board membership is not just about filling a seat on a Board with anyone who is willing to sit at the table, nor is it just about honoring someone of great wealth and generosity. The membership of a Board has a direct impact on the ability of a school to fulfill its vision. Hildy Gottlieb, President of Help 4 NonProfits, whose books (including her manual on board recruitment and orientation) have become industry standards, asks; “So how can we improve the recruitment process? The first step would be to make sure you actually have a process!” Gottlieb and others recommend that the process of recruiting new Board members be taken as seriously as hiring someone for a position.

Structurally, this means that a Board should have a Committee on Trustees (CoT) or Governance Committee whose members include well-connected, thoughtful people who understand the challenges and opportunities facing the school. According to the National Association of Independent Schools (NAIS), Independent School Management (ISM), and the Partnership for Excellence in Jewish Education (PEJE), the CoT is one of the most important committees of the Board. The three indispensable functions of the Trusteeship Committee are nomination/selection of new Board members, evaluation of the Board and its members,

and professional development of the Board.

What does this committee do to help lead a successful Board recruitment process?

## Step One: Figure out what/who you are looking for

Your Board’s CoT is responsible for developing a profile of the current Board, knowing who is likely to be cycling off, linking the process of creating the future profile with the school strategic plan which reflects an understanding of where the school is and what the vision is of what the school will become, and identifying what kind of people will help make this vision a reality. This profile should include not only the expertise that is needed but the qualities that will enable the Board to work effectively: team players, good-listeners, sharp thinkers, etc. The CoT should share its thinking with the Board and facilitate a discussion that engages all Board members in the process of considering what the ideal profile of the school’s Board would be and to the next step in the process.

## Step Two: Create a list of potential Board members

Solicit suggestions of people who reflect the profile you have created. This is one way of taking full advantage of your network – your Board members, committee chairs, your staff, your parents, and your community leadership.

It is immensely helpful if the CoT has developed a system for keeping track of recommended prospects. Much like a donor database, this dynamic list should include a profile of the person including professional expertise, style of work-

ing, information about other Boards and committees on which they have or are serving, personal connections, passions, and demographic information, and, in



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addition, key relationships with those connected to the school and a history of the school’s cultivation activities and contact with the prospect.

Maintaining such a list or database provides the school with a valuable resource for filling open committee positions, through which the Board can cultivate the pipeline for eventual Board service as well as uncovering candidates for immediate Board membership.

## Step Three: Prioritize the list and share the candidates and their bios with the rest of the Board

This is a step that many institutions skip. How often have you attended an annual meeting at which you are asked to vote on a slate of new Board members without having a clue who they are and why they were chosen? In addition to sharing the list of names, explain the rationale for choosing these candidates and how these prospective candidates can contribute to the future work of the Board.

The Jewish Community Day School CoT actually vets the candidates with the whole Board before we begin to engage with them about possible membership. Imagine the embarrassment of asking someone to consider joining the Board only to have a current Board member

raise a serious objection once a candidate is already on the slate.

Remember that not everyone you recruit will accept so make sure to cultivate a pool of candidates for each seat you have open.

#### **Step Four: Then develop a strategy to successfully recruit your top candidates**

Begin by getting to know them as they get to know you and the school. If they are non-parent community members introduce them to the school by sharing with them school marketing materials, inviting them for a tour and visit, having them meet the Head of School, the President of the Board and other Board members.

If they are parents, take the opportunity to familiarize them with the strategic issues facing the school and its future, check with them and those with whom they have worked at the school whether they can separate their “parent hat” from an “institutional hat” that looks out for the long term health of the school.

Check for potential conflicts of interest; consider inviting them to attend a Board meeting.

When you are ready to invite a candidate to join the Board, in addition to ensuring he/she understands how they can make a difference on your Board, the key to successful recruitment is to have the right person ask the prospect. Just as in fundraising where people give to people, in Board recruitment, people agree to serve with people. Whether it is a friend, a business associate, the Head of the School or President of the Board, strategically decide who the best person is to extend the invitation to the candidate.

More and more non-profits are introducing actual Board application processes. The process entails inviting the candidates to apply to become a Board member. What I like about this is that it sends

a message about the seriousness and privilege associated with being a Board member. Imagine a time when your Board is considered a “Board of choice” and there are more great people waiting for the opportunity to join the Board than there are openings.

#### **Step Five: Now that they are on the Board, invest in them**

The process does not end once a candidate has accepted. Investing in their suc-

**Remember that not everyone you recruit will accept so make sure to cultivate a pool of candidates for each seat you have open.**

cess is an investment in your school’s success. Provide them with a mentor and develop an orientation that goes on over the course of at least the first year of service, gauging their learning, and, as different challenges and questions arise, providing them with background materials, and historical briefings that will enable them to understand the challenges and opportunities the school is facing. Check in with them periodically about how they are feeling and they can best be supported to maximize their contribution to the Board’s work.

A successful Board member who appreciates the process by which they were

recruited and inducted will spread the word and be one of your best recruiters in the future! This is the beginning of a self-perpetuating process and a process that will help to constantly renew your school with energetic, enthusiastic, committed, and wise leadership. Remember effective Boards do not just happen; they are the result of intentional thought and strategic planning.

Some helpful resources: NAIS [www.nais.org](http://www.nais.org), PEJE [www.peje.org](http://www.peje.org), Help4NonProf-

its [www.help4non-profits.com](http://www.help4non-profits.com), Board Source [www.boardsource.org](http://www.boardsource.org), Free Management Library [www.management-help.org](http://www.management-help.org). ■

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# Managing Low-Performing Board Members

■ by Dr. Marc N. Kramer

Articles on workplace performance- that is, getting the most and the best out of employees – crowd nearly every business and trade magazine each month, with more columns focused on “low performers” than seemingly anything else. Without reading a single article, stereotypes about the working world could lead us to their foregone conclusions: In the corporate world, low performing employees get “fixed or fired;” in the non-profit world, low performers are subjected to endless professional development and, thanks to the Peter Principle, eventually move on to greener pastures.

While neither of these scenarios is universally true (there is deadwood aplenty in the corporate world and many non-profit leaders believe in sink-or-swim employee management), and while these outcomes seem diametric, they share a crucial element: the individuals in question are employees of the organization, paid by the organization to accomplish particular tasks and fulfill particular roles.

But what about low-performing volunteers, especially the donor/volunteers who serve as our Board members? We’ve all served on Boards where there is someone (often, someones) who rarely shows up to meetings, avoids taking on substantive work, and provides financial support far below his or her real capacity – yet there they are on the Board year in and year out. There is certainly a temptation to lob “lazy,” “indifferent,” and “doing this for his ego” at these low performers – especially if others on the Board are working hard to ensure the school’s success. Enticing, yes, but perhaps, a more nuanced approach may be to first examine why some individuals are low-performing Board members and to then develop strategies to improve the performance of the entire Board.

## Why, when the vitality of our school is so important, do we have low-performing Board members?

Although there are many reasons why some Board members are low-performers, I would like to highlight eight substantive issues:

### There is a lack of clarity as to the purpose of a Board.

Some believe that the Board exists to run the school; others think that the Board’s job is to rubber-stamp the work of the head of school. Some believe that Boards exist only to raise money; some believe that the Board is a glamorized PTO. More typically, individuals join Boards believing that the purpose of the Board is to provide leadership, but all they are ultimately charged with attending to matters of management. The low-performer might not truly understand the work of the Board, and as such, does not contribute to it in meaningful ways.

### Individuals lack clarity as to why they were asked to sit on a Board.

There are any number of reasons why someone is asked to sit on a Board. Is it that they bring a particular skill set or knowledge base? Do they have significant philanthropic potential? Does their presence increase the social value of the Board or school? Are they there to lead? To follow? To lend their good name? The low-performer might fully understand what a Board does and still not know how or why she or he is on it. Committees on Trustees must make evident to those people it selects the rationale for asking of their time, talent and support.

**The Board lacks focus.** Were it not enough that many Boards must enhance

clarity of purpose, many more still fundamentally lack focus. The stated purpose of the Board is to promote and protect the mission of the school, yet Board meetings invariably focus on hot



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lunch, changing Internet providers, and other minutia far from the real tasks at hand. Meetings ramble on for hours with only limited outcomes. The entire Board debates matters that should be explored and resolved at the committee level, and even then, a question seemingly resolved last month dominates this month’s meeting. The “crisis de jour” defines the work of the Board. The low-performing Board member is an artifact of a low-performing Board. Boards must self-monitor and insist of themselves that they remain focused on the work of leadership.

### Expectations are unknown, misunderstood, and/or not managed with equity.

Board members, new Board members in particular, often lament that they don’t know what is expected of them. How many meetings must they attend (there are so many of them after all)? What constitutes a “leadership level gift?” What details of a committee meeting should be reported to the entire Board and what should be left out? Why, if a meeting is called for 7:00 p.m., do some people arrive promptly at 7:30 (and why in the world do we wait for them!)? Low-performance can be symptomatic of frustration.

**There is no consensus as to the definition of "success."** A job well done is a moving target subject to too many opinions. A Board member single-handedly thwarts a crisis and is chastised by others as a renegade. Another Board member raises \$100 for each member of her family only to learn that these funds do not count toward her pledge. A task force working to improve teacher morale is bombarded with questions about improving test scores. Some low-performers are simply aiming too low, or having prior work denigrated by others, elect to sit back and watch others' efforts get shot down.

**Individuals do not feel valued.** What separates employees from volunteers is how they are compensated. Staff get paid in dollars (frequently not enough, but that is another story entirely). Volunteers get paid with gratitude, acknowledgment, and self-satisfaction. How many times does someone on the Board have a well-intended idea dismissed by others? Do Boards always honor their biggest donors at the expense of their hardest workers? Are Board members given the vantage point from which to see how the work they

do at committee level impacts the big picture of school life? Low-performers might be expressing a need to be validated, acknowledged, and thanked.

**There is a mismatch between the individuals and the task assigned to them.** How often does one hear stories of the treasurer who cannot read a spreadsheet or a president unwilling or make decisions? What about the lawyer Board member who wants nothing more

**There is a mismatch between the values of the individual and the values of the school.** As I reflect on the past seven years at RAVSAK, I am increasingly convinced that this is the linchpin challenge for many low-performing Board members. Low-performers often want the school to do or be something that it cannot, will not, or must not. Regardless of any degree of wealth, power, influence, or motivation, for me, this comes down to a simple

**“ While seemingly high-risk, one of the most effective tools for increasing Board performance is self-evaluation.**

than to help plan the new ball field because she loves sports and is asked to review contracts? How many times are working people asked to attend mid-day meetings? How many \$5,000 donors are uncomfortable calling others for \$1,000 gifts? Low-performers may through their actions or inactions be expressing a dislike for or discomfort with the tasks they are asked to do.

litmus test: If someone does not value Jewish literacy, does not believe that Jewish sacred text and tradition must inform the Jewish future, does not see the centrality of Israel in the lives of Jews everywhere, and does not see vast potential in Jewish diversity, then they do not belong on a day school Board.

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## What can be done to improve Board life such that all Board members have the potential for great success?

As with the reasons as to why some Board members are low-performing, the ways through which to improve Board culture to reduce low performance are great in number. Here I offer nine ideas for consideration:

**Clarify the work of the Board, the expectations of individuals on the Board, and the “rules” of engagement to all current and potential members. Enforce the “rules” equitably.** Boards should have written handbooks and protocols. A Board *brit katanah* – a collaborative compact that outlines what being on the Board means – can be invaluable. Make sure that the core Jewish values of the school are both crystal clear and not subject to whimsy. There should be no question as to what it means to be on the school Board. Board policies must also apply universally, even to your most generous donors.

**Start new volunteer leaders off “low and slow.”** A school needs a strong, high-functioning Board. Novice volunteers, regardless of affluence, should enter a school’s volunteer system at the committee – not Board – level and should be monitored for greater leadership potential. Untried volunteers should be given small, manageable tasks at first and gradually assigned more substantive work. If someone is a low-performer, let him let you know this before you hand him the reigns of power! Also, use this time to find out what she likes to do, what she is good at doing, and what she would be excited to learn.

**Model expectations.** Just like the master teachers every school wants, Board leaders should model the very expectations they hold for others. Meetings should start on time, end on time, and be predicated upon an unwavering commitment to *derech erez* (civil discourse; a

willingness to agree to disagree). Officers of the Board should give their gifts first before asking others on the Board to do so. Keep confidential matters confidential. Always publicly advocate for the school and its head. Demonstrate a willingness to learn, grow, and work hard on behalf of the school. Be a *dugmah* (role model) for low-performers so they have a template against which to assess their own performance.

**Reward the behaviors you want; ignore those you don’t.** In a controversial (if hilarious) *New York Times* op-ed a few years back, a professional animal trainer described how she “tamed” her sock-dropping, chore-avoidant husband using the same methods she used to teach sea lions tricks: when he did something that she liked (such as taking out the trash) she would toss him a minnow in the form of a warm word of praise; when he left dirty dishes in the sink, she might do them herself or let them fester, but she would never chide him for his misdeed. Whether or not this method actually works on spouses, we know that it is an effective tool for increasing Board productivity. Find ways to acknowledge work that is well done and avoid casting disparity at sub-par accomplishments. Inspire potentially low-performing Board members to aim high. Most folks will opt for carrots without being threatened by sticks.

**Institute a buddy system.** Boards should develop paradigms in which its highest performing members are paired with less vibrant individuals as mentors, coaches, or co-chairs. Let potentially weak Board members engage with inspirational peers who can help increase their likelihood for success (remember, one reason people agree to be on Boards is to be a part of that social and political inner sanctum).

**Invest in your investors.** No one is born knowing how to be a good Board member; the complex matrix of skills, tools, knowledge, and dispositions must be learned. In addition to peer mentor-

ing, Board members should undergo formal training in volunteer leadership. All Board members should participate in regular Board retreats and seminars; those with proven track records and burgeoning potential should be encouraged to attend regional and national conferences. To be sure, all of this costs money, but an investment in a facilitator who helps a few underperforming Board members increase their commitment to the school pays for itself multifold.

**Evaluate the Board and each Board member.** While seemingly high-risk, one of the most effective tools for increasing Board performance is self-evaluation. Volunteers, unlike paid employees who have supervisors and formal evaluations, will have no way of knowing how they are doing if no one tells them. In some schools, the Executive Committee plays a “supervisory” role with the rest of the Board; in other cases, Boards undertake regular self-studies as a means of assessing individual and collective success and shortcomings. Ultimately, the goal is to ensure that no low-performer can say “I didn’t know I wasn’t pulling my weight around here.”

**Create safe exit strategies for low-performing Board members.** Although it may be an honor to be asked to sit on a Board, it need not be a disgrace to leave one. Low-performing Board members more often than not are aware of their performance level, are on some level dissatisfied, and may want to get off the Board, yet lack a means of doing so without looking like a quitter or a failure. Boards should consider crafting organic step-back/step-off points in between elections for individuals who need to leave the Board. One strategy might be to think like professional baseball: just as sometimes major league players need to go back to the minor leagues to gain or regain requisite skills, so, too, might a low-performing Board member step off the Board but remain on a standing committee. By allowing individuals the option to self-regulate their own com-

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# Support for the Head = Support for the School

■ by Judy Miller

**M**oving to a new community to become the head of a Jewish community day school is exciting and challenging, but can be overwhelming personally and professionally. Heads experience the thrill of finding a school that is a “good fit” for their education and experience and lay leadership, staff and students are excited, also. Everyone wants the new relationship to succeed.

But as anyone who has ever been in a relationship of any sort (read: everyone) knows, good relationships take hard work. When the players in a relationship are on ostensibly equal footing – such as in a good marriage- then each is charged with the very same task: bring 100% of yourself to the relationship with close attention to honesty, integrity, good humor, and a clear sense that you are “in it together.” Each has the same investment and each has the same to lose should things go awry.

The relationship between a head of school and the Board is, of course, something very different. At the risk of pointing out the obvious, the players are not on equal footing: the head is the employee of the Board. The “sides” are also not equal in number: the head of school might be paired with the president, but ultimately, the other Board members figure into the equation. Significantly, too, the stakes are very different one to the other: for the head of school, at risk is both livelihood and reputation; for the Board, at risk is the leadership of the school and their col-

lective reputation. Certainly good communications, fairness, a commitment to “no surprises” and the like are essential. One of the best ways to ensure that success is with a strong Support and Evaluation Committee.

A Support and Evaluation Committee (SEC) is small, but powerful and very effective. It is composed of people who also served on the Search Committee so they know the head well and are “on the same page” having discussed goals for the first few years. The Executive Committee of the Board should choose the members of the SEC in a thoughtful manner, looking for individuals with human resource experience, who are well-versed in the history of the school and knowledgeable about the politics of the community.

What does the SEC do? While each school will employ its own strategies, the core work of the SEC is:

- Help the head of school monitor her/his own performance
- Provide ongoing feedback to the head in ways that are non-threatening and focused on improvement
- Serve as an intermediary between the head and the Board if need be
- Immerse the head in the culture and climate of the school

Since every community has its *minhag* - traditions of how things are done – it is vital that the SEC meet frequently throughout the head’s first year on the job. Every 5-6 weeks is a viable and recommended



**Judy Miller**

is the Head of School at the Milwaukee Jewish Day School in Milwaukee, WI. Judy can be reached at [jmiller@mjds.org](mailto:jmiller@mjds.org)

schedule. The SEC and head should review the events of the past few weeks and discuss upcoming school happenings. The SEC can advise whom to contact in the community to get answers to questions and to support programming. Constant feedback and truly constructive criticism will help a head to be successful. Working in concert and engaging in our open and honest communication will lead to a successful transition.

As the second year begins, and the “honeymoon period” ends, the SEC committee may be divided into two separate committees: one to provide confidential support to the head and a second to focus on professional goals and performance.

A head of school can thrive when working in collaboration with dedicated lay leaders. Acknowledging and supporting the human side of the headship is vital to assure the strength and longevity of day school leadership. ■

## RAVSAK Awarded Department of Homeland Security Grant

RAVSAK was recently identified as one of just 41 organizations in New York City to be awarded a Department of Homeland Security Grant. The 2007 DHS grant-making process focused on securing so-called “soft targets” such as synagogues, schools, and central agencies from the possibility of a terrorist

attack. RAVSAK will receive approximately \$40,000 which will be combined with \$12,000 of matching funds to support the installation of a new security system for the national office. Six RAVSAK-affiliated schools also received DHS funds in 2007.

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# Getting the Right People “on Board”

■ by Mary Hundley deKuyper

*Adapted from the NAIS Trustee Handbook: A Guide to Effective Governance for Independent School Boards, Ninth Edition.*

In his best-selling book, *Good to Great*, management guru Jim Collins talks about “getting the right people on the bus.” By this he means that a company’s success is not the result of filling all the job vacancies, but by ensuring that the most appropriate people for each job are filling the roles... and that they can work together as a team. This is vitally important for independent school Boards as well. Every Board seat should be filled by competent and committed individuals who give of their time, talents, and treasure.

When considering new members for a school’s Board of trustees, most Boards focus on the constituencies these potential new trustees represent. In considering bringing in new members based on their constituency, you should be aware of the following:

- **Current parents.** Day school Boards tend to have large numbers of parent-trustees. Often, K-6 and K-8 school Boards are made up exclusively of parents. Cooperative school Boards are by definition constituted solely of parents. Parents bring a deep personal interest in the school. However, they can be focused on the present, generalize from their children’s experiences, and become more involved in operational matters. NAIS recommends a balanced Board, with 50 percent or less being current parents. Such Boards, experience shows, have all the zeal of parent-driven Boards but less preoccupation with the present and more of a future-focused, strategic orientation.
- **Alumni and Trustees.** Day school Boards of K-12 and secondary schools have more alumnae/

trustees. Often a majority of trustees at Boarding schools are graduates. These Board members bring a spirit of gratitude for their education and are living examples of the fulfillment of the school’s mission. Occasionally, however, they are so enamored of the past that they have difficulty adapting to and embracing change.

- **Faculty.** A small percentage of schools have faculty-trustees. This is not a recommended practice, but many schools with faculty on the Board find they are deeply committed to the school’s mission and bring their educational expertise and knowledge of students to the Board’s deliberations. However, most Boards look to the head for such expertise and knowledge. In fact, having faculty-trustees makes them their own “bosses,” as the Board oversees the head, who oversees the faculty. This conflict of interest can make things difficult. NAIS recommends that faculty members not serve on the Board; rather, they should be included on committees and task forces where their expertise will be of value.
- **Students.** Very few schools have student-trustees, and NAIS recommends against their serving the school in that capacity. Not only are they not of age legally, but their general maturity can make it difficult for them to move beyond their particular experiences as current students. Nevertheless, there are ways to involve students in the work of the Board without electing them to it. Students may serve on committees, meet with trustees as student leaders, participate in surveys about their interests, and so on.
- **Past parents and grandparents.** Past parents may constitute the best of all worlds for trustee service:

They’re committed, knowledgeable, and distant from current school issues. Grandparents may offer similar perspectives, and have a closer link to the school, without the immediacy of the current parent relationship. However, past parents might need more in-depth orientation than those who are currently associated with the school.

- **Funders.** Although all schools hope that all of their adult constituents will contribute funds, it is not recommended that representatives of private and corporate foundations serve on the Board. In fact, many foundations have policies that forbid employees to serve on Boards of institutions that the foundation does, or may, fund. A perceived or real conflict of interest may arise when such individuals serve as trustees.
- **Friends.** Though they may require more in-depth orientation, these trustees can bring the most objectivity as well as needed expertise not found within the immediate school community. Educators, especially heads, often serve as valuable trustees, as they bring the experience of other independent schools or institutions to the questions under discussion. However, it is recommended that you not recruit the heads of schools from which your school derives students or to which it sends students.

Although constituent-based Boards have been the frame of reference for independent schools in the past, contemporary thinking in the non-profit governance world suggests a new concept: visionary Boards, where trustees are selected less for the constituency they may represent and more for the imagination, team orientation, and strategic focus they may bring to the table.

To help find those visionary trustees, first develop a list of essential criteria for new trustees, based on a thorough assessment of the Board's and the school's needs. Keep in mind the oft-repeated three R's of trusteeship: raising image, raising students, raising money. Often, schools find their best trustees by asking others in their community to nominate prospective members. This helps Boards cast a broader net and think beyond the traditional constituent representation model.

If major gaps exist between the candidate pool and the criteria once you've come up with a roster of potential trustees, renew efforts to increase the pool. Keep a record of all those nominated and their background materials so that succeeding committees can renew them. A person who doesn't fit the current criteria may be perfect for the Board in three years.

Getting the "right people on the bus" or

in this case, on your Board of trustees, is not an easy task. But doing extra homework in order to identify trustees for your school who will not just represent a constituency, but will also offer a wider perspective will help you ensure that your school thrives long into the future.

For information about the Trustee Handbook as well as other resources for independent schools, please visit the NAIS website: [www.nais.org](http://www.nais.org). ■

## Managing Low-Performing Board Members

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mitment, the Board simultaneously gives over the opportunity for future learning and the hope for increased performance at a later date.

**Be willing to ask someone to leave the Board.** Individual Board members who, despite all efforts, remain low-performers, should be asked to leave the

Board. Studies have repeatedly shown that when the lowest rated members of a team are removed and replaced by highly motivated neophytes, the entire team increases its performance level. This may be understood as one part "The Weakest Link" and two parts "Survivor." High-performing Board members are disencumbered of shouldering low-performing peers. At the same time, they are

infused with a renewed sense of mission: as the ones remaining on the Board, we must work harder and help support the new Board members succeed as well. Of course, the process of asking someone to leave the Board must be informed by Jewish values – a person, regardless of their failures as a Board member, must be allowed to exit with dignity and reputation in tact. ■

## Work, Wisdom, and Wealth

[continued from page 4]

add lasting value to the school's Board members who serve. We need to share a passion for our communities and constituents. We need constantly to seek to create value.

Anne Frank gently reminds us of our freedom in giving our work, wisdom, and wealth toward improving the world. Our day school world needs us to stretch beyond the norm, inspiring Board members to make our school their top priority and passion. May we all create opportunities for Board members that dramatically advance our mission. ■

*The Executive Committee and Staff of RAVSAK wish you a Happy Chanukah*



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# Managing Transition – The Role of the School Board

■ by Paul Shaviv

*Paul Shaviv is in his tenth year as Head of the Anne and Max Tanenbaum Community Hebrew Academy of Toronto – “TanenbaumCHAT”, the Community high school of the Greater Toronto Jewish community. During that time the school has doubled its enrolment, from 750 to over 1,500; more than doubled its staff (now just over 200); undertaken a \$9m refurbishment and expansion of one campus, with a further \$10m refurbishment now planned; created a complete second branch north of Toronto, which this September moved from rented premises into a state-of-the-art \$30m new building; and undertaken a complete Administrative restructuring. The school operations budget increased from \$9m to more than \$23m. Here he reflects on change in school organizations.*

In the spring of 1998 I was appointed as Headmaster of the Community Hebrew Academy of Toronto (CHAT and later TanenbaumCHAT). I had been Head of Bialik High School in Montreal, and knew very little about Toronto. During the interview process, the school was described as a school of 750 students. No one mentioned growth. On arrival at the school in the summer of 1998, I saw very quickly that the school could be poised on the edge of explosive growth, for several reasons: **1.** The Toronto Jewish elementary schools, (our feeder schools), were doing a much better job of retaining their students; **2.** We were doing a much better job at recruiting and retaining them (increasing the proportion of students continuing on to Jewish High school from 30%-40% to 80%); **3.** Our school redefined its character as a community school, and was perceived as much more ‘user-friendly’ to a wider spectrum of the community; **4.** We radically improved our recruitment literature, our admissions process and our marketing; and **5.** The reputation of the school

climbed rapidly in the late 1990’s - early 2000’s, so that it became not just acceptable but fashionable to send your child to TanenbaumCHAT. We built on recruitment success by working hard to improve and expand the experiential dimension of school life (sports, Shabbaton program, Israel trip, clubs and co-curricular). We also worked on retention, improving from 85% annually to 93%-95%.

It became very apparent that if we were to cope successfully with this growth, our school needed to change. Quickly. Since then, most of my professional time has been spent managing change in every area of school operations.

Over the ensuing nine (now coming into ten) years, the school doubled in size and completely transformed itself. In the first year (1998 – 9), we organized and implemented the largest refurbishment and expansion programme in the history of the school, implemented at breakneck speed in the summer of 1999. In the following summer, faced with severe overcrowding, we seized the opportunity to rent a vacant high school some 20km north of the existing site, and created a second branch to serve our burgeoning North Toronto constituency. At the same time we began working with UJA Federation of Greater Toronto on long-term plans, which culminated just a few weeks ago with the opening of a sparkling \$30m+ purpose-built new building. A further improvement to our original campus is our next step. Along the way we implemented a thorough professional restructuring of the school, involving a number of senior Administrative appointments, and had to recruit 100 or so teachers!

Throughout this process of fundamental

transition change, the Board of Directors, too, underwent significant changes. The leadership changed rapidly early in the process; new leadership who were perhaps more ready to undertake far-



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is the Head of School at the Anne and Max Tanenbaum CHAT in Toronto, ON. Paul can be reached at [pshaviv@chat-edu.ca](mailto:pshaviv@chat-edu.ca)

reaching decisions replaced leaders who had served the school honorably and well for a number of years. It was not without some tension. The new leadership swiftly showed itself ready to form new partnerships, principally with our local UJA Federation, and understood that to command the support of UJA Federation and of the philanthropic support that UJA Federation was able to introduce to the school, the school had to be integrated more fully into the ‘community’ context. There was also the realization that the governance structure of the school was no longer appropriate for the size and dynamic of the ‘new’ CHAT, and a series of outstanding lay leaders steered the Board through a constitutional review and a review (in reality, an endorsement) of the school’s ‘Statement of Philosophy and Purpose’. In doing so they formalized and legitimized appropriate new governance, reassuring the parent body (and the community) that they were not afraid of examining their own process and structure, either.

The most important result of the constitutional review was – in my view – the provisions it made for renewal of leadership. No Board member may serve for more than a fixed number of terms, and no President may serve for more than

[continued on page 21]



# Israel Ambassador to the United States

After a semester on a MASA program in Israel, Healey Heissler returned to her campus at Sonoma State University in Northern California to study Communications. She would like to "bridge the gap between the way the world views Israel and the real Israel".

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# Big Questions/Bold Answers

## 21<sup>st</sup> Annual RAVSAK Leadership Conference

**Chevre,**

As they say in Texas, *Yeehaaw* – we could not be more excited about seeing you in Houston for the 21st Annual RAVSAK Leadership Conference from January 20-23, 2008.

The RAVSAK Annual Leadership Conference is the most significant forum for Jewish community day school leaders in North America. Every community day school is encouraged to send their leadership team – head of school, Judaic studies director, admissions director, development director, Board president and president elect- to what promises to be an essential component of your school's institutional development.

It is again our privilege to share this exciting conference with PARDeS: The Progressive Association of Reform Day Schools, who will be joining us in Houston. This inter-agency partnership is just one of the many ways that the Jewish day school world can come together in service of our mutual commitment to excellence.

The theme of this year's conference is Big Questions/Bold Answers. Across the sub-themes of Leadership & Professionalism, Education & Pedagogy, Cost/Funding/Finance, and, Diversity, we will explore meta-issues of day school leadership and wrestle with leading-edge responses to the challenges we all face daily. Through keynote speeches, panel presentations, intensive workshops, case studies, peer-to-peer consultations, and plenary sessions, we will learn, teach, grow, and ultimately, return to our schools with bold new ideas and revitalized energies.

At this time, you can register for the conference and make hotel arrangements by filling out our online registration form. Please visit [www.ravsak.org](http://www.ravsak.org) and click on the conference button on the home page. Be sure to book your room at the magnificent InterContinental Houston at the same time.

Whatever we can do to make your time at the RAVSAK Annual Leadership Conference a great success would be our pleasure. Please contact Robin Feldman at 212-665-1320 x 303 or by e-mail at [rfeldman@ravsak.org](mailto:rfeldman@ravsak.org).

**Conference highlights include:**

**Malachai Pancoast**, internationally renowned leadership coach: **How to Work Less, Play More, and Still Get the Job Done in a Normal School Week**

**Scott Shay**, author of *Getting Our Groove Back*: **Making Day Schools Affordable – The Egalitarian Tuition Plan**

**Shifra Broznick**, Founder and President, Advancing Women Professionals and the Jewish Community: **Using Gender as a Lens on Leadership and Shattering the Glass (Salary) Ceiling**

**Leslie Litman**, Executive Director of The Center for Hebrew Language: **Re-engineering How We Teach Hebrew**

**Dr. Aryeh Davidson**, professor of Jewish education at JTS: **Jewish High Schools, Adolescence and the Possible Self**

**Panel Presentations include:** Capital Campaigns, Taking About G-d, Building Leadership from Within, Linking Professional Growth to Compensation, Serving a Wide Range of Learners, and Financial Aid and the Middle Class.

**Other conference highlights include:** Lay and Professional Networking Sessions • Marketplace • Torah L'Sh'ma • Project SuLaM Reunion • Kick-off Event for the RAVSAK Forest in Israel • Gourmet Meals • Time to Reflect and Recharge • Dedicated Sessions for Board Leaders, Heads, Judaic Directors, High Schools, PARDeS Schools

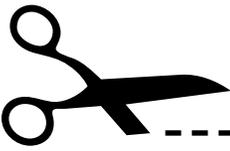
A complete and up-to-date conference agenda, list of presenters and topics, and presenter biographies can be found on the RAVSAK website at [www.ravsak.org](http://www.ravsak.org).

**Robin Feldman**,  
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**Nancy Pryzant Picus**,  
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## Registration

### Early-bird Registration (Before December 1, 2007)

- Member Registration - \$595
- Second Participant Registration - \$575
- Third Participant Registration - \$550
- Non-Member Registration - \$1,000
- Board Member/Lay Leader Special Registration - \$325  
For Sunday-Monday attendance only. Lay leaders who wish to attend the full conference should register at the Member rate of \$575

### Registration (Deadline: January 1, 2008)

- Member Registration - \$650
- Second Participant Registration - \$600
- Third Participant Registration - \$600
- Non-Member Registration - \$1,000
- Board Member/Lay Leader Special Registration - \$350  
For Sunday-Monday attendance only. Lay leaders who wish to attend the full conference should register at the Member rate of \$650

### Conference Scholarship Fund - \$50

Please consider a donation of \$50 toward the conference scholarship fund to support the attendance of your colleagues who require financial assistance.

## Volunteer Opportunities

RAVSAK needs your help. During the conference, there are many volunteer opportunities to assist in creating a welcoming community for all in attendance. Please consider which of the following you would be willing to help with.

- Be a buddy to a first time RAVSAK conference attendee
- Introduce/Thank a speaker or session
- Lead *HaMotzi* at the start of a meal
- Lead *Birkat HaMazon* at the end of a meal

### Lead t'filah at morning minyan (please check all that apply)

- Learners Minyan
- Egalitarian Minyan
- Mechitza Minyan
- Reform Minyan

### Read Torah during morning minyan (please check all that apply)

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## Participant Information

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Address: \_\_\_\_\_ City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

### Participant

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Please photocopy this page for additional participants or register on-line at [www.ravsak/conference](http://www.ravsak/conference)

# Non-Jewish Board Members

■ by Dr. Barbara Davis

A disturbing website highlighting the “power” of Jews in the current federal executive branch asks the following questions:

- “To what degree do these people have allegiance to the Jewish victimology tradition?”
- “To what degree do they hold dear the state of Israel within their respective organization’s policy?”
- “To what degree do they reflect a ‘Jewish view of the world’?”
- “To what extent are these people activists in public policy socialization processes, sensitizing the public to Jewish interests and concerns?”

Ignoring the perturbing context in which these questions were raised, it is not unreasonable to note that these same doubts might be on the minds of those who wonder whether non-Jews should serve on the Boards of Jewish institutions, particularly Jewish schools.

Many Jewish organizations specify that leadership positions and Board membership are open only to Jews. Others permit non-Jewish spouses to participate in non-religious leadership positions. With the recent decision by the Conservative movement to allow children of non-Jewish mothers to attend Schechter schools, and with the Reform movement’s acceptance of patrilineal descent, it is clear that a significant number of non-Jewish parents will be part of community day school families for the foreseeable future. As involved and active parents, eager to play meaningful roles in their children’s education, it is also clear that the issue of non-Jewish membership in Board and leadership positions of Jewish day schools needs to be addressed.

The Jewish Reconstructionist Federation dealt with similar issues in its 1998 report entitled, “Boundaries and Opportunities - The Role of Non-Jews in Jewish Reconstructionist Federation Congregations.” That report noted that “Jews in North America have intermarried with non-Jews at an accelerating rate over the past 30 years. More and more non-Jews – partners/spouses, grandparents, children, in-laws and siblings - are involved in the life of synagogues in some way, whether for specific events (like a baby naming or bar/bat mitzvah), or through longer term commitments (such as attending services, supporting religious education, or participating in social action activities).

“The reality of non-Jews in congregational life presents Jewish Reconstructionist Federation congregations with both an opportunity and a dilemma. While valuing an inclusive and welcoming atmosphere, Reconstructionists also value the integrity of Jewish ritual and community. Many congregations are grappling with the issues raised by non-Jews in community life; Reconstructionist congregations care about the definition of who is a Jew and the perpetuation of Jews as a distinct and unique people. It is therefore important to maintain the distinction between Jew and non-Jew.”

Do these same distinctions apply in other areas of Jewish life? Is there a difference for those areas that do not involve ritual observance, such as day schools? Is it appropriate for the non-Jewish parent of a child enrolled in a community day school – who has clearly made a commitment to his or her Jewish partner, and to raising a child Jewishly – to sit on the governing Board of the school? Should there be a “quota” or “tipping point” for the number of non-Jewish Board members?

There are 3 main issues to be considered in this regard: **1.** The ability of non-Jews to understand and fully commit to the mission of the Jewish day school; **2.** The



**Dr. Barbara Davis**

is the Secretary of RAVSAK, Editor of *HaYidion* and Head of School at the Syracuse Hebrew Day School in Dewitt, NY. Barbara can be reached at [shds@twcny.rr.com](mailto:shds@twcny.rr.com)

role of non-Jews as representatives of the Jewish educational community; **3.** The comfort of the non-Jewish Board members within the context of the Jewish day school.

The topic is a broad one, and research needs to be done to address the issues. As Dean Goldfein, head of school at the Contra Costa Jewish Community Day School in Lafayette, California, points out in an online article, “Interfaith families find themselves at home in Jewish community day schools. Community day schools are a segment of the broader Jewish day school world committed to welcoming a wide range of Jewish perspectives and lifestyles into a pluralistic setting. They are bound by the common commitment to Jewish literacy and emphasize doing Jewish things rather than debating questions of Jewish definition. The challenge is for the non-Jewish parent to share in the universal values of Judaism that are taught at a day school.”

How can this latter challenge be addressed? For the answer to that narrower question, we spoke with Brian Jones, a non-Jewish Board member of the Syracuse Hebrew Day School in Dewitt, New York. He is the parent of a graduate and a current student in the school and has sat on its Board of Directors for two years.

**Q. Is the fact that you are not Jewish an issue?**

A. Not at all. In fact, I think that it is very important to have a diverse Board as long as the members are all committed to the same mission of the school. I have worked with other Boards in a professional capacity and the best ones are constantly looking for fresh perspectives and ideas. As a relatively small Jewish community, there are only so many individuals Jewish-based organizations in Syracuse can gain support from.

**Q. Are you ever uncomfortable? If so, when?**

A. Not in a religious context but the same way that any parent of multilingual children may feel discomfort at not being able to share that with them if they don't know the language themselves.

**Q. Do you feel that not being Jewish gives you a different perspective?**

A. I don't view my membership as helping the Board to identify with a broader community or as a representative of day school families with non-Jewish children, although these should have some importance. The perspective is helpful because I get to ask questions that perhaps other Board members feel they should already know the answer to, but may not have fully known the answer themselves.

**Q. Does it matter that you are not Jewish?**

A. Absolutely. I get to experience many things I would not otherwise have exposure to.

**Q. Are there times when you would not speak/vote on an issue because you are not Jewish?**

A. No. Board issues for the school pretty much transcend the idea of any one individual's faith so why would it. We are entrusted to provide a degree of direction

and support to the school's staff and my children attend the school so I have the same personal stake as any other Board members that have children currently attending the school.

**Q. Would it bother you if/that Board meetings began with a *d'var Torah* or other overtly religious act?**

A. We are a private school and should take advantage of the privileges that being one provides us. Celebrating the Jewish faith is a very important part of the school's mission. The Board needs to identify with that mission and Board meetings provide only a brief opportunity to reinforce that.

The conversation that community day schools have begun with interfaith families and non-Jewish Board members is a profound and meaningful one, that can positively impact all those involved in Jewish education. Keeping the lines of communication open on this issue will only benefit all involved. ■

## Managing Transitional Change

[continued from page 16]

two 2-year terms of office. In that way it ensured that there will always be movement in the governance structure of the school. Movement attracts talent.

Yet the changes in the Board went far beyond that. A very strong sense of process emerged. There are 'firewalls' in our system (for example, the lay/professional firewall between policy and operations) that serve our school well. The deliberations of the Board and its committees are conducted in an atmosphere of good order and respect for principles (and principals!) and individuals. But in addition, the culture of governance changed. Once the Board, as an entity showed itself ready to tackle major decisions in one area – initially construction – they began to be more aggressive (in a positive sense) about other areas of school life.

In undergoing major change, the atti-

tude and skills of Board leadership are critical.

They have to be wholeheartedly behind both process and implementation – not least because the process of change is profoundly unsettling to other constituencies in the school as well, and Board members have to be seen to be leaders and supporters.

The Board leadership – the president and executive – have to be careful to fully engage the rest of the Board in decisions and policy. Communication, explanation and information are essential.

The role of the school professional leadership – the head of the school and administration – are also crucial. They, too, must be part of the solution, not part of the problem, and must be conscientious in providing the Board with input and advice arising from their practical under-

standing of school operations.

The Board (and the administration) must be prepared to change and be changed by major school decisions.

Finally, one very personal lesson that I learned over the last ten years is the value of negotiating skill. Every decision and every change involves negotiation in one way or another. Every negotiation involves weighing alternatives and giving way in smaller or larger degree. To effect change and to move forward – and every institution, especially a Jewish school dealing with a rapidly-changing community, has to adapt, change, or die - you have to be flexible and continually negotiate. Good, skillful negotiation makes the difference between reaching your goals by conflict and confrontation, or by consensus and 'good feeling'. It is one of the rarer, but more important, skills in our professional and community lives. ■

# Transition and Stability: The Day School and the Interim Head

■ by Rita Cortes

**B**efore getting too far into this commentary, let me make sure of full disclosure: This article does not purport to represent any kind of scientific or organized study of the experience of Jewish day schools and interim Heads of School and their relationship with their Boards of Trustees. Rather, my intent is to share with you some of our experiences from the past year at the Hyman Brand Hebrew Academy in Overland Park, Kansas (a suburb of Kansas City), as seen through the eyes of the Chair of the Board of Trustees.

When our Head of School announced his departure in late winter/early spring of 2006, the Board of Trustees was faced with the challenge of determining whether to hire a new Head for the next school year (we were largely already past the hiring season for new Heads) or to engage an Interim Head for the school year 2005-2006. The decision was made to engage an existing administrator as Interim Head until a new Head was hired, whether that was in the short term or done through a more traditional process.

This situation presented what I will call the first of the “new challenges” posed in a time of transition. Traditionally (and appropriately) the role of the Board with regard to staffing of the school is to hire, review, support and, where necessary, dismiss the Head of School. While a Board may be apprised of other staffing decisions, typically as part of the budget approval process, those who work in the area of institutional governance often remind us that the Board has one employee—the Head of School. In fact, I would posit that the greatest area of misunderstanding in day school culture is the notion of Board influence or right to influence in staffing decisions made by the Head of School. Not that it does not happen—sometimes

Boards assert themselves into this area, sometimes Heads seek input that blurs the line and creates a sense of authority in the Board that is difficult to later revoke. But every institution aspires to well delineated roles between the Board and Head and staffing is clearly one of those roles within the Head’s authority.

As a result of the traditional separation of roles, Board members, particularly those who are not parents, do not have great exposure to other administrators within the school, even a school of our size (at the time 260 students). At the moment of the departure announcement, the Board remains largely dependent on the recommendation of the departing Head and parent Trustees with regard to the strengths and potential of internal Interim Head candidates. While there are individuals around the United States who will engage in Interim Headships from outside a school community, the Board in this case appreciated and respected the departing Head’s recommendation, who was a long time school employee and administrator. This recommendation truly was a stabilizing gift to the school. The external Interim Head model is likely more viable in the larger Jewish communities on the east and west coast and possibly Chicago. Here in the heartland, the internal model presented us with an excellent option. We were also fortunate that our Interim Head made clear from the outset that she did not intend to seek the permanent Head of School position, to avoid any ambiguity which I think was critical to her success.

At the same time our Upper School Principal, Marion Gould, was engaged as Interim Head, the Board formed a Search Committee to begin the process of intro-

spection and planning necessary to make an informed hire for the next permanent Head of School. While a brief search took place that spring, it was quickly determined that it was crucial for the Board, with the guidance of the Search Committee and its consultant to work to define its priorities and objectives to guide the hiring process. This need for planning was evident from the evaluation process



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of prospective candidates—we knew what they were looking for but needed to better define who we were as a school and what skills we felt were necessary to build on the strengths of the 40 year old community day school we served. As a result, the Board accepted the Search Committee’s recommendation to plan a year long “traditional” search for a new Head. Mrs. Gould’s commitment to the school and its principles allowed the Board the time to do its work properly and the Search Committee, under the leadership of Carol Porter (a parent and Trustee), put in long hours to define, to search, to interview, to analyze and, ultimately to hire, a fabulous new Head of School in the spring of 2007, Mr. Howard Haas. The support of organizations like RAVSAK and PEJE and their leadership throughout this period was also of great importance in this process.

In retrospect, one of the steps we should have taken would have been the establishment of a Head Support Team to provide institutional and community knowledge to our Interim Head. While a Head

[continued on page 26]



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MATCH is a project of Jewish Funders Network and PEJE and is funded by The Gottesman Fund, Ingeborg and Ira Leon Rennert, The Charles and Lynn Schusterman Family Foundation, The AVI CHAI Foundation, and an anonymous donor.

# The Importance of a Board Retreat

■ by Suzanne Lynch

A Board retreat can be a very effective tool for helping the Board of a community day school determine why the school exists, what its vision for the future is and how to create the roadmap for that vision. Because the Board's time is precious and limited, a successful retreat should be well planned and well facilitated.

Why hold a retreat? Board retreats are useful for addressing issues that arise outside of a normal Board meeting. The amount of regular business handled in a regular Board meeting tends to limit the Board's ability to tackle overarching issues. The structure of a regular Board meeting also inhibits discourse and the development of solutions. A regular Board meeting does not always allow for the introduction or discussion of special resources such as surveys, guest experts or evaluations.

A Board retreat allows a Board to meet in an environment that is unrestricted by routines or traditional approaches. If planned and facilitated properly, there should be more time for discussion, cre-

fully, the Board will gain a sense of unity, and each member will have a better understanding and a mutual respect for the other members. A good retreat can be the foundation for more effective teamwork for the year ahead.

The first step in planning a Board retreat is identifying the main issue to be addressed. Topics can vary from the school's mission to long range planning to governance. It is important to choose a single theme and concentrate on only one to two topics within that theme. For example, if the school needs to develop a mission statement, that would be the main theme. The primary issue in devising a mission statement would be the school's core values. From there, the Board can write a vision statement. But the main theme of the retreat is developing a mission statement. By having a single theme or focus, the Board can be assured of achieving a resolution.

Proper planning will help the retreat be productive. It also ensures that the Board

the facility chosen has the space you need for traditional and non-traditional discussion and exercises.

One of the keys to a successful Board retreat is an effective facilitator. The facilitator guides discussion, maintains the focus, directs the tone of the discussion and helps to keep time limits. The facilitator should not add his or her opinions



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to the content of the discussion or influence the outcome. He or she promotes opportunities for everyone's opinions to be expressed and respected. A facilitator also ensures that disagreements are channeled into finding common ground or an acceptable resolution.

Ideally, a Board should hire an outside facilitator. That way, the Board can benefit from impartiality. Also, all of the Board members can participate and focus on the issue at hand. The Board receives the facilitator's broad experience and expertise. The facilitator should understand the goals of the retreat and should have experience in the primary area being explored in the retreat. If the primary purpose of the retreat is to rewrite the school's mission statement, a facilitator with broad financial expertise might be helpful, but might not be the best fit for the objective of the meeting. A good facilitator can also recognize the interaction style of the Board and develop methods that build upon the strengths of the group.

In addition to proper planning and recruiting a strong and pertinent facilitator, there are some additional guidelines

**“ Why hold a retreat? Board retreats are useful for addressing issues that arise outside of a normal Board meeting. The amount of regular business handled in a regular Board meeting tends to limit the Board's ability to tackle overarching issues.**

ative thinking and strategic planning. A retreat is a good time to introduce and discuss special topics.

The extra effort and investment by all of the Board members at a retreat will result in a shared understanding of the school's needs, issues and opportunities. Hope-

members will come to the retreat understanding the expectations and the desired outcome.

Try to determine the retreat date at least six to twelve months in advance. Give the participants plenty of notice. This will guarantee 100% participation. Make sure

to help make the retreat successful. First it is important to establish ground rules that encourage full participation and cooperation by all Board members. In addition, the school's mission, values and program priorities should be the backbone of all decisions made. These should also frame all debate and discussion.

It is important to understand that one retreat cannot solve or resolve the school's challenges or cannot recognize the school's opportunities. However, by staying focused on a few key issues, the retreat can be successful. It is imperative that the Board follow through on all the issues raised at the retreat and complete any open tasks. The leadership of the Board should take all the good that arose from the retreat and carry it through the year.

How do you evaluate a retreat's success? If there are written objectives on the front-end of the retreat, the Board can assess if these were met. The Board's sense of accomplishment, smoother operation and its ability to identify and employ specific outcomes are also measurements of success. But in the end, it is the Board's willingness and enthusiasm to have another retreat in the future that will signal success. ■

## Dr. Elliott Rabin Appointed Director of Educational Programs

The Executive Committee welcomes Dr. Elliott Rabin to the RAVSAK staff as our first Director of Educational Programs. Elliott holds a bachelors degree from Swathmore College, and both a masters and doctorate from Indiana University where he was awarded the Stallknecht Prize and the Interuniversity Fellowship in Jewish Studies.



A former assistant editor at Harper's Magazine, Dr. Rabin has taught Hebrew Literature, Hebrew Language and Judaic Studies at Indiana University, Baruch College, New York University and University of Louisville. From 2000-2007, Elliot served as the Director of Education at Makor, a program of the 92nd Street Y. He is the author of the recently published *Understanding the Hebrew Bible: A Reader's Guide* (KTAV, 2006) as well as a number of popular and scholarly essays and articles.

In his new role at RAVSAK, Elliott will oversee our growing catalogue of educational programs, develop new curricula, manage content for *HaYidion*, and work closely with Dr. Marc Kramer, Executive Director, in crafting new programs for lay and professional leaders. ■

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resources like wood and paper. Participating schools which meet their goal of 60 trees will receive a framed certificate crafted specifically for the inaugural campaign for Ya'ar Ravsak and Israel at 60.

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## Transition and Stability: The Day School and the Interim Head

[continued from page 16]

typically has oversight of all school functions—educational, business, development, etc.—most internal interim Heads come out of a specific function within the school and need access, at their discretion, to resources which can help them through new areas, answer questions without “agenda” and be a confidential source of guidance. We were able, in large part, to connect our Interim Head with some of these resources over time, but the establishment of such a small, confidential Team at the outset would have provided her with an invaluable resource.

What are the key objectives for the Interim Head? Each school is in a different place when engaging an Interim Head, but all are in some form of transition. In our case the primary objective was to maintain stability—in our educational objectives, in staffing, in enrollment—to allow a focused search to take place, to ensure that students and their families continued to receive a quality and caring educational experience, and to assure the community that we were engaging in our mission in a positive and thoughtful manner. Not that the process was without challenge. In the midst of this the Board was also engaged in strategic planning to meet the objectives of our primary accrediting agency, a process that I would

not advise take place simultaneous with a Head of School search if at all possible.

Another challenge with an Interim Head is finding the balance for both the Board Chair and the Board in providing advice where needed but staying within the proper roles of Board and Head. We were fortunate that my predecessor, John Uhlmann, guided the Board through a review of its governance processes and procedures during the year preceding our Head's departure and led the Board in adopting a new governance framework. Many times during the Interim year we found ourselves referring back to this framework for guidance on how to properly draw the line between the Board's role and that of the Interim Head. The reality is that while an Interim Head may need more coaching and external support than an experienced Head of School, the role of the Board during the Interim period should not change in relation to the Head. This aspect might be the most challenging to sustain as it is not entirely intuitive. Board members act with good intent and want to help their institution thrive, but it is important to maintain leadership structure and role separation during this period for the future success of the school.

Mrs. Gould and I worked frequently on ensuring that where she sought advice it

was given but that there was no ambiguity about who was running the day-to-day operations of the school. Mrs. Gould worked tirelessly throughout the Interim period to ensure that standards remained high for faculty, students and staff and she was the key partner to Mr. Haas, our new Head of School, in the transition to his leadership. The keys to her success were solid and consistent communication, maintaining quality standards, and the ability to manage a vast array of demands with kindness, professionalism and dignity. She conveyed a sense of calm throughout the school and empowered those around her, some of whom had also taken on interim roles to support the school during the transition year.

In retrospect, I think an Interim year may be of value for many schools as an opportunity for introspection and planning if the resources exist within the school to sustain leadership during such a period. The Interim year allowed our school to consolidate our strengths and define our goals and objectives for the future in a way that is often challenging to do in the whirl and demands of the typical school and Board year. The Hyman Brand Hebrew Academy benefited from the professional leadership of our Interim Head and the ability to lay the groundwork for a transition to great new leadership. ■

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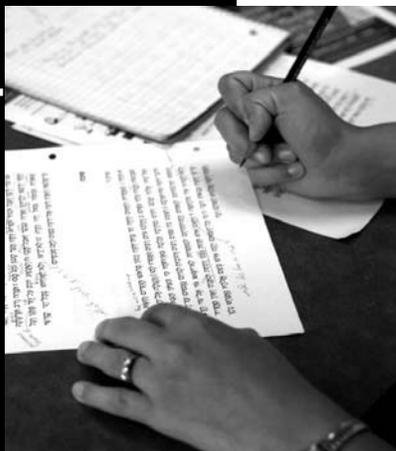


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# Why Boards Don't Govern

■ by CompassPoint Non-profit Services

*This article is reprinted with permission from the website [www.grassrootsfundraising.org](http://www.grassrootsfundraising.org).*

In the aftermath of every “non-profit mismanagement” news story is the question: Why didn't the Board do something? Yet the Boards of the non-profits recently headlined with scandals such as outlandish compensation for executive directors, the use of organizational funds for personal luxuries, or nepotism did not do any less than most non-profit Boards. The reality is that most non-profit Boards are ineffective in their governing function. Only when gross mismanagement is discovered does a failure at governance come to the fore. Sometimes the failure does not involve personal scandal but reveals organizational laxity, such as an organization using funds raised for one purpose for other program areas.

Nothing can dampen donors' interest more quickly than an organization that does not seem to be taking responsibility for itself – and that responsibility lies in those who govern.

## What Is Governance?

The two roles of support and governance encompass different tasks. In the role of supporters, Board members seek to raise money, bring clout to the organization, provide special skills, such as in law or accounting, and act as ambassadors to the community. The many books and seminars on the subject testify to the emphasis on helping Boards help – on strengthening organizations by means of Board assistance.

The governance role, in contrast, has a different goal; protection of the public interest. Governance responsibilities for Boards include selecting the top executive (the chief executive officer or executive director) and assessing his or her performance, reviewing and authorizing plans

and commitments, ensuring compliance with legal and contract requirements, and evaluating the organization's work.

Both of these Board roles are distinguished from that of management, which is the province of the executive director.

## What's Wrong With The “Ideal” Board Member?

When most Board members and executive directors dream of their ideal Board member they envision someone who contributes money, obtains contributions from others, helps the organization get media coverage and political contacts, brings specialized expertise, and helps diversify the Board's composition. This ideal Board member also identifies with the organization, is liked and admired by staff and other Board members, and “fits in.” These characteristics describe a Board member who can help provide the critical support agencies need to succeed.

But the very qualities that make Board members good supporters are often qualities that limit them as governors. The reason Boards don't govern is less because they are uneducated or uninterested than because of some crucial, material, inherent reasons:

Board members rely on staff for information. Because Board members are often recruited to bring assistance and skills from other sectors of society, they often rely on staff for information about both the field and the organization. Unless they are themselves part of the people served (patrons of the community theater, adult children of Alzheimer's patients, tenants of affordable housing), they typically have no independent information about the organization on which to draw.

Board members are often unfamiliar with non-profit management. Non-profits are

fundamentally different from either large corporations or small businesses. For example, a manufacturer can drop an unprofitable product line without the ill social consequences of an after-school program closing. In particular, people from business are often unacquainted with volunteer management, indirect cost rates, and fundraising strategies.

A crucial limitation on Board effectiveness is the simple lack of time. Board members are usually achievers with many responsibilities and find it difficult to attend meetings, study materials, and attend functions. In response, organizations try to keep meetings short and have fewer of them per year, or simply demand more time than most people can give.

At least narrowly speaking, it is not in the interest of the executive staff to have an active, governing Board. Supporters help the manager get the job done; governors often make the job harder. The governance role is an outsider's role, holding the organization, and specifically the executive staff, to high standards of performance. While most non-profit managers work hard to do a good job, it is not in any manager's personal interest to make her own job harder.

Finally, the consequences for inadequate governance have rarely been borne by non-profit leaders as individuals. Even when an organization fails, Board members are unlikely to have their careers or reputations affected, and the executive director can usually find another job. The big losers are the people or community purpose the organization was designed to serve.

## Boards Govern In Crisis, So Why Don't They Govern All The Time?

Despite the obstacles and uncertainty, Boards strive to perform their governance roles well. They make valiant ef-

forts to read and understand financial statements. They listen attentively to reports about client-centered methodologies and new x-ray machines. They give up Sundays for Board retreats.

When agencies are in crisis, Boards go further. They give up weekends to attend emergency meetings where hard questions are asked; they sort out financial problems, and meet with disgruntled funders and clients. They seek out a wide range of informants: funders, staff, colleagues in the field, and members or other Boards. When serious charges are brought to Boards about CEO's, Boards often hire independent investigators or analysts to report on charges of sexual harassment, racial or gender discrimination, alcohol or drug abuse, or misuse of funds. In crisis, Boards realize that while they can't manage, they must govern. And to do so they need information sources that are independent of executive staff; they need their own, diverse channels of information.

If Boards can act to overcome some of their limitations and act effectively as governors in time of crisis, why don't they act that way in normal times?

Some reasons that Boards don't govern all the time have been noted: lack of time, lack of independent information, and lack of familiarity with the "business." But in addition, another important factor is at work: a desire to avoid tension and conflict.

When Boards act in their governance and oversight roles, uncomfortable questions may be asked; tensions may enter the room. It takes a lot of nerve for a Board member to challenge a staff recommendation in a Board meeting. New Board members are often quiet, waiting until they know more before speaking up. But long-time Board members too are reluctant to appear adversarial, not "with the team."

In fact, when asking probing, "tough" questions, Board members may feel

guilty. Is it fair to question staff competency in fundraising when I've only made an average contribution myself? Is it being distrustful to ask for a list of salaries and comparable salaries in similar organizations? Does my admiration for a competing organization's programs reflect a lack of loyalty to my own organization? A subtle cause of this avoidance of conflict is the emphasis on a smooth working partnership. Boards often view tension as a symptom of an illness that everyone must try to avoid catching. Conflicts should be smoothed over. Staff frequently see Board members with serious questions as obstacles at best, enemies at worst. (This is exacerbated when Board members who don't do much as supporters still want to ask questions.) As a result, some Boards neglect this responsibility altogether and act as a rubber stamp for the director. Just as often, Boards will allow one or two members to be the chronic complainers without permitting them any real influence.

The wider non-profit community has coluded with this avoidance through the scant attention given to the governance role in books, academic papers, and other management literature. A small industry has grown up around Board training and consulting. While consultants and trainers have done a great deal to help Boards raise more money, they have done little to help Boards be more effective as governors. One reason is that they have been hired to help the Board support the organization, not to help it govern.

In crisis, the emphasis on a smooth working relationship takes a back seat to the need for action and straight answers. It is "okay" in a crisis to ask tough questions. In normal times, Boards need to learn how to use the authority they are willing to assert in times of crisis.

### **The Paradox and The Challenge**

The Board-staff relationship is a paradoxical one. When acting in their gov-

erning role, the Board must stand above staff and be the "boss." But when acting in their supporting role, Board members act to support and assist staff-led work.

Some Boards become so excited about their roles as governors that they mistake governance for close supervision of management and begin meddling in minor management affairs. In other cases, as Boards govern more, they shirk their supporting role. The challenge is to fulfill both roles, not simply switch from one to the other.

In short, Boards have some inherent limitations in their ability to govern, including lack of time, lack of familiarity in the field, and lack of material stake. These limitations have been supplemented by the sector's nearly exclusive emphasis on the Board's supporting role and by a human tendency to avoid conflict. A first step toward an effective Board acknowledgement of the paradox and an understanding of the need to perform both functions equally well. A failure to govern as well as support is a transgression both against clients and against the wider community.

### **Strengthening Governance**

Here are some practical ways to strengthen governance:

Make sure that, as a Board member, you have information about the financial and program performance of the organization that comes from independent sources. Too often Boards get all their information from the executive director; they may not realize that the organization is having financial difficulties until too late, or that the organization's programs are not keeping up with changes in the world. To obtain independent financial information, make sure that the Board (or its audit/finance committee) selects the external auditor, hears the auditor's report, and has at least one meeting per year with the auditor and without staff present. Periodically the Board should similarly work

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# Associate Member Article

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Center for the Blind

### for the Blind

A Mitzvah Project to Sponsor a Puppy for the Israel Guide Dog Center for the Blind covers all the food and veterinary costs for a puppy that will eventually provide independence and dignity for a blind Israeli. This summer we graduated our 280th partnership; your students can be a part of guaranteeing our continued success and have a direct impact on improving the life of an Israeli in need.

[www.israelguidedog.org](http://www.israelguidedog.org),  
[www.mitzvahdog.blogspot.com](http://www.mitzvahdog.blogspot.com)

## Jewish Genetic Disease Consortium

Screening for nine Jewish genetic diseases will be available at the Riverdale Y in Riverdale, NY on December 2nd. For more information and to register, visit our Events Calendar at [www.jewishgeneticdiseases.org](http://www.jewishgeneticdiseases.org) or call (866) 370-GENE (4363).



Keshet: The Center for  
Educational Tourism in Israel

### Keshet Israel

When you partner Keshet to plan your school's Israel trip, you can trust that you are working with an educational organization based in Israel that will bring you and your students closer to the land and people of Israel. We are proud to offer unique programming aspects such as low ropes course elements to strengthen the group dynamics, exciting mifgashim with Israeli youth and educational programming that compliments your curriculum. Call us today to begin planning your school's next trip!

Interested in becoming an Associate Member? Please contact Marla Rottenstreich, Marketing Coordinator at [marlar@ravsak.org](mailto:marlar@ravsak.org) or (646) 496-7162



National Gaucher Foundation

National Gaucher Foundation

Expression of Hope art exhibit will be held at the National Museum of Health and Medicine in Washington, DC. A collaboration with the National Gaucher Foundation, Expression of Hope and the National Museum of Health and Medi-

cine. Artwork by individuals with Lysosomal Storage Disorders. November 8th – opening night by invitation only, Open to the public November 9, 2007 to February 28, 2008



PANIM

There is still room to bring your students to PANIM's Panim el Panim and Jewish Civics Initiative seminars in 2008! Log onto www.panim.org to sign up before the remaining

spaces fill up! Also, let your students know about our two outstanding summer programs, Summer JAM [www.dejam.org](http://www.dejam.org) and PanimWorks [www.panimworks.org](http://www.panimworks.org).



Oranim Educational Initiatives

Oranim is deeply involved in a project to bring Jewish Educators to Israel on a free program, especially those who have not been to Israel before. [www.JewishAdventures.com/T2I](http://www.JewishAdventures.com/T2I)

## RAVSAK Selected by Jewish Teen Funders Network To Join National Program

**R**AVSAK was recently selected as one of ten programs nationwide to participate in the Pilot Incentive Grants Program of the Jewish Teen Funders Network (JTFN), a youth philanthropy project of the Jewish Funders Network. This grant, together with a matching gift from the RAVSAK Executive Committee, will fund **Project ROPE: Roots of Philanthropy Education**, an inter-school collaborative linking Jewish sacred-text study with student philanthropy and social justice learning.

Project ROPE will give to a new generation of young American Jews the skills, tools, Jewish lens and experiences through which to become lifelong learners, doers and givers. There are three core goals of Project ROPE: to teach teens the Jewish roots, values and imperatives of philanthropic giving; to give them a basic understanding of effective fundraising fundamentals including the grant making process and effective philanthropic methods; and to provide them with the hands-on learning experience of running a fundraising campaign for a cause of their choice and responsibly allocating the funds raised.

Recognizing the potential of Jewish youth philanthropy programs to empower and educate teens about effective philanthropy and Jewish values, JTFN awarded ten grants to Jewish communities committed to creating high quality Jewish youth philanthropy programs. In addition to a grant of \$10,000 per year for three years, JTFN will work closely with grantees on program development and staff training.

"We are confident that the foundation provided by Jewish youth philanthropy programs will strengthen the teens' insight and commitment to philanthropy, and that the alumni of these programs will engage in lifelong giving within the framework of Jewish values," shares Ricky Shechtel, co-founder of JTFN and current chair of the Jewish Funders Network.

### About Jewish Teen Funders Network

The mission of the Jewish Teen Funders Network (JTFN) is to provide Jewish teens with hands-on opportunities to engage in collective philanthropic giving with their peers, guided by Jewish values. A program of the Jewish Funders Net-



work, JTFN is committed to increasing the number of Jewish youth philanthropy programs around the country, and the number of teens involved in these programs. JTFN also aims to enhance the Jewish educational value of these programs by providing curricular and programmatic resources on Jewish values and philanthropy. JTFN is supported by the Max M. and Marjorie S. Fisher Foundation, the Estelle Friedman Gervis Foundation, and, and the Sierra Foundation. ■

# Partners in Leadership

■ by Marcy Balogh and Cheryl Finkel

**B**oard Chair: “An article about leadership, so I guess you should write it since you are the leader of the school.”

Head of School: “No, it seems clear to me that if they are talking about a leader, they are talking about you.”

Board Chair: “But not only do you run the operations of the school, you have great expertise related to day schools in general. You are in the best position to speak as the leader.”

Head of School: “The Board is responsible to provide the vision for the school. They elected you to serve as their leader. As Chair of the Board of Trustees, the school depends on you to lead our school into the future.”

Board Chair: “My role is term limited. Thus, you have the more significant voice.”

Head of School: “My voice alone is not adequate in leading.”

Board Chair and Head of School: “So, maybe we should be Partners in Leadership!”

The concept of partnership may appear easy; however, the actual implementation can be complex and challenging. Various metaphors illustrate the importance of this partnership – among our favorites are tennis doubles, and a three-legged race. In both of these metaphors there is no individual success without the team’s success; also both partners must be constantly aware of the other’s capabilities, constraints, and actions in order to make their own moves successful. Another nice partnership metaphor is a marriage. Here the important points center on communication:

- No secrets
- No surprises
- No delayed information
- Total loyalty
- Total discretion and confidentiality

We invite you to explore the importance of this shared leadership model as well as “10 Top Tips” for making it work.

## Crystal Clear Roles and Boundaries

We must begin with the fundamentals – with an understanding that Boards do governance and staff do operations. Thus, the leader of the Board and the leader of the staff must both have defined roles congruent with these responsibilities. However, this separation of roles is not always easy to maintain. Job descriptions for each of these positions should be articulated verbally and in writing. It works best when confusing or dissenting areas are identified early, preferably before a problem occurs. Resources related to roles definition and boundaries are plentiful. Check out the materials at [www.nais.org](http://www.nais.org), [www.peje.org](http://www.peje.org), and [www.boardsource.org](http://www.boardsource.org). Also, local federations and non-profit associations often have Board workshops to support their agencies.

## Vive la Difference: You’ve Both Got Style

As if day schools are not complex enough, partnering is a challenge in any venue – schools, work or home. Board Chairs and Heads of School are wonderful, intelligent, and committed



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people. That said, some partnerships are easier “fits” than others. It is important to get to know your partner. That means really take the time to find out what makes your partner unique. Learn about each other’s history. Discuss your dreams. Explore ways that each of you like to work. Have you discussed when your partner prefers to meet? Meetings at 6:30 am are not everyone’s favorite. That said, not everyone is a night owl either. Do you know if your partner would prefer to communicate by email or phone? Should you use a work, cell or home number? These superficially simple details make a big difference. By dealing with your style preferences up front, you make dealing with the inevitable big, more stressful issues easier. We recommend using tools like Myers-Briggs Type Indicator or other preference tools to structure these conversations. You might consider having a consultant or coach help facilitate and get you started on the right foot.

## Communicate, Communicate, Communicate

So, you’ve been a Head of School for 20 years....or two years. It doesn’t make a

difference. When it comes to your Board Chair, you must communicate (even if this is your 12th Board Chair). The same goes for you, the new (or not so new) Board Chair, you must set a time to meet. The success of your schools depends on

this partnership. Do you have weekly meetings? Bi-weekly? Meet together to deal with specific issues, meeting planning as well as general support. You are each other's most important supporter. To accomplish this partnership, regular

and adequate communication is vital.

The "Ten Top Tips for Effective Partnerships" is a good place to begin. Enjoy the partnership experience—it will be good for you and your school! ■

## Ten Top Tips for Effective Partnerships

### *For the Head*

1. Recognize that it is your responsibility along with the Board Chair to keep the Board on task and in focus.
2. Make sure you have consistent and timely meetings with the Board Chair and set up a calendar structure for these meetings to happen.
3. Tell the Board Chair everything that is going wrong or may go wrong BEFORE the complaints come. If you are taking potentially controversial action – even when it's clearly within your purview – use "sechel" (common sense) and give the Board Chair a heads-up.
4. Be positive and supportive of the Board and its individual members in all public settings and events. Help educate the other constituencies of the school about the role and function of the Board of Trustees.
5. Ask for support; share your needs; holding back information about realities of the demands on you (and other staff members) prevents the Board from doing its job effectively.

### *For the Board Chair*

1. Lead the Board in fulfilling its charge and in maintaining boundaries between the Head of School and Board roles. Specifically make clear that the Board does not generally function as a court of last appeal to overrule Head decisions, since it does not regulate day to day operations. Rather the role of the Board is to hold the school in trust; i.e., to finance the school and plan for its future.
2. Tell the Head of School all the complaints you hear; you can be most supportive by not withholding information.
3. Ensure that any disagreements with the Head are discussed in a private forum, with confidentiality. Public discord between Head and Board is never okay.
4. Direct school problems to the attention of the appropriate school employee, usually the Head, and let the Head know you've done it.
5. Accept that you will not fully understand the demands of the Headship, which absorbs pressures from competing constituencies, including the Board; therefore offer empathy and support at all times.

## Membership has its privileges.

To renew or start your membership, visit us on the web, at [www.ravsak.org](http://www.ravsak.org).

Questions? Please call Robin Feldman,  
Director of Member Services at **212-665-1320**

# RAVSAK Catapulted into the Philanthropic Spotlight by Slingshot '07-'08

We are pleased to announce that RAVSAK has been acknowledged by 21/64, a non-profit consulting division of the Andrea and Charles Bronfman Philanthropies, as one of the 50 most creative and effective organizations from across the country. Over 500 Jewish organizations were nominated for this award. Profiles of these leading-edge organizations are featured in Slingshot '07-'08. This book is meant to be used by funders of all sizes and ages who want to support innovative Jewish life. A free copy of Slingshot '07-'08 can be ordered or a PDF of the guide downloaded at [www.slingshotfund.org](http://www.slingshotfund.org). ■



## Why Boards Don't Govern

[continued from page 29]

with independent program evaluators and outside experts who make their reports directly to the Board and the staff jointly. Organizations that are too small to need an audit should make sure that someone outside of staff periodically looks over the financial situation.

Use independent management evaluators. In addition to auditors and program evaluators, Boards need unbiased sources of information about management as well. One of the most difficult tasks for Boards is the evaluation of the executive director. On one hand, a Board can't interview staff about their opinions; but on the other hand, problems are created when a Board obtains all its information from the person being evaluated. An independent evaluator might interview staff, and, for example, if there were several allegations of sexual harassment, would report to the Board that such charges exist.

Make governance an explicit part of meetings. Boards should affirm their responsibilities in both support and governance. Board agendas should be clearly marked "Governance Items," and "Supporting Items." Among the qualities we should seek and reward in Board members are critical thought, discernment, and a questioning attitude. When someone raises an objection or concern, or votes against the majority, the Board president should make a point of expressing appreciation for the seriousness and courage to make the point.

Board chairs should encourage dissent, debate, and questions. The Board chair should make comments such as the following at each meeting: "Marc, thank you for bringing up the risks involved with this idea," or "Well, we may all be in agreement...but Crystal, could you serve as our devil's advocate and give a strong argument for the other side?"

Recruit governors. When recruiting, Boards should seek members who are good governors as well as those who are good supporters; people who know clients as well as people who know philanthropists; people familiar with non-profit management as well as those familiar with business; operational volunteers as well as fundraising volunteers; people who ask critical questions as well as people who cheer. A diverse Board such as this will keep the agency rooted in the world it serves as well as in the world in which it raises funds. In many cases, governors and supporters may turn out to be the same people once governing responsibilities are recognized and valued as much as supporting responsibilities.

CompassPoint is located at 731 Market Street, Suite 200, San Francisco, CA 94103. They can be reached at 415-541-9000, [info@compasspoint.org](mailto:info@compasspoint.org) and [www.compasspoint.org](http://www.compasspoint.org). ■

# LIFE IS A JOURNEY. ISRAEL IS A FIRST STEP.



*"Being in Israel and seeing it hits you in such an incredible way."*

—Ari Stern



*"Every day I think about last summer. I think about the places I saw and the Israelis I met and how inspiring they were. And most of all I think about the feelings I had...when I realized I was in the most beautiful place on earth. My experience has given me the drive to make a difference in the world."*

—Dori Goldman



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