

# The Institute for Day School Management *for Jewish Day School Leaders*

A joint program of the  
Columbia University Graduate School of Business  
and UJA-Federation of New York



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**UJA**  **Federation**  
*of New York*



The Institute for Day School Management  
*for Jewish Day School Leaders*

Funded by UJA-Federation of New York  
under the auspices of the Fund for Jewish Education

# The Institute for Day School Management

## *for Jewish Day School Leaders*

**P**rincipal, head of school, *menahel*, headmaster — the names may be different, but the challenges are the same. School leadership is the nexus of vision and mission where leadership and management intersect. Our era is one of rapid growth and change coupled with heightened expectation and accountability. School leadership today goes beyond the role of instructional leadership and requires the ability to think and plan strategically and to anticipate and implement change.

School leaders are masters of many domains yet often have limited formal management training. Strong and effective executive leadership means that organizational management strategies and skills must be learned, enhanced, and reinforced. Knowledge of management theory and practice is a vital complement to the school leader's educational expertise and scholarship.

UJA-Federation recognizes the pivotal role of the leader in achieving the maximum potential from a day school or yeshiva. As part of UJA-Federation's overall efforts to propel Jewish education toward a goal of widely acknowledged excellence, UJA-Federation is making a substantial investment in quality leadership. UJA-Federation is therefore partnering with Columbia University's Graduate School of Business' Institute for Not-for-Profit Management (INM) to create the Institute for Day School Management (IDSJ). This endeavor will bring the highest level of executive education to Jewish day school leaders. INM is one of the world's leading providers of executive education, featuring an outstanding faculty of academics and practitioners. The INM approach is comprehensive, integrating theory and practice to create a results-oriented program.

A program of study has been customized in conjunction with a Curriculum Advisory Committee comprising Jewish communal and academic leaders. Participants will study and receive applied training in such areas as strategic management, administration, financial management, conflict management and negotiation, fund development, marketing and public relations, and personal leadership.

By completing the program you will:

- Develop new insights, enabling you to lead through increasingly complex conditions and challenges.
- Be empowered to translate your vision into practice and implement constructive change.
- Improve your abilities to work with your board and the community.
- Strengthen your skills in financial management and resource development.

## What are the Institute's Features and Benefits?

### Results-Oriented Process

The INM approach is comprehensive and integrates theory with practical applications. Courses explore a wide range of disciplines, with an emphasis on strategic management. The faculty uses highly interactive methods that reinforce the concepts taught, creating an educational experience that is both intense and demanding by design. The courses require pre-work that must be completed in advance and assignments for completion between modules that help participants use new tools and skills.

### Role of the Jewish Day School Leader

Courses have been customized by a Curriculum Advisory Committee drawn from leading Jewish communal and academic leaders. Participants will examine and analyze challenges facing the day school leader.

### Nationally Renowned University Faculty

Columbia University is recognized for its superior academic standards and pursuit of excellence. A cadre of specialized and experienced professors and practitioners constitute the IDSM faculty.

Successful completion of the institute merits a joint certificate from Columbia University and UJA-Federation of New York. The ability to complete the rigorous academic program identifies graduates as members of executive leadership committed to excellence and growth.

### Development of a Comprehensive Strategic Plan

Each participant develops a strategic plan for his or her organization to better meet the current and future needs of constituents. In the process,

participants prepare the following:

- Mission review
- Vision development
- Internal and external appraisals
- Environmental scan
- Portfolio analysis
- Strategic gap analysis
- Identification of strategic priorities and key performance outcomes
- Organizational alignment
- Implementation plan

The strategy project evolves throughout each course and is developed throughout the program, with faculty and peer feedback in periodic small-group sessions. The project culminates in a comprehensive plan for implementation in the workplace.

### Board Participation

A key board representative of each participating school will be invited to attend designated segments of the IDSM and participate in the development of strategic vision and its implementation. Schools will be offered a variety of follow-up options to support implementation of new management techniques.

### Interactive Format

Active engagement in analysis and discussion of case studies, as well as other interactive learning techniques including small-group projects, simulations, and participant presentations, help reinforce learning and encourage participation. Diverse participant backgrounds provide a valuable resource for the entire group and pave the way for networking and meaningful agency collaborations.

## What Should I Know About the Institute?

### Locations and Schedules

The institute takes place 18 days over the course of one year, including two four-night overnight retreats in July 2007 and 2008, and three Manhattan-based modules in fall and winter 2007 and spring 2008.

Retreats are held at attractive, esthetic facilities conducive to study, reflection, and professional rejuvenation.

### Meals

Retreats will include three gourmet glatt kosher meals and snacks throughout the day and evening. Course cycles will include continental breakfast, lunch, and snacks.

### Small Class Size

The program is limited to 24 participants.

## Who Should Apply to the Institute?

Participants are heads of schools (*menahalim*, educational directors, and principals) who work with lay boards to set and implement strategic direction for their schools.

## How Do I Apply to the Institute?

Requirements are listed on the application form.

To be considered for the institute, applicants must submit the application packet to the Institute for Day School Management no later than Friday, March 30, 2007.

An interview is required for all candidates.

### Cost

There is no cost. This program is funded by UJA-Federation of New York under the auspices of the Fund for Jewish Education.

### Participant/Agency Agreement

Participants must submit an agreement stating that the participant agrees to participate fully in the institute, which requires a significant amount of time and preparation. In addition, participants agree to design a strategic plan for the agency and to share it with the agency upon completion of the institute.

The school agrees to release participants for all regularly scheduled programs and to pay the participants' full salary and benefits while engaged at the institute.

# COURSE CONTENT AND FACULTY

## Course Descriptions

### Strategic Management

#### Professor Murray Low

*B.A., M.B.A., Simon Fraser University, 1976, 1985; Ph.D., University of Pennsylvania, 1991. Associate professor and founder of the Entrepreneurship Program, Columbia University Graduate School of Business, and director of the Eugene M. Lang Center for Entrepreneurship. Interests in strategic management, and entrepreneurship in independent, corporate and not-for-profit settings.*

This part of the Institute for Day School Management deals with the overall strategic direction of the organization. Particular emphasis is placed on strategy formulation — the process of crafting a course of action that aligns with the organization’s mission, its environment, and its internal strengths and weaknesses. The course achieves its aims through a combination of case discussions, lectures, and small group analyses. The course, and the entire program, culminates with a strategic plan you will develop for your own organization.

### Administration and Management

#### Professor Thomas P. Ference

*B.S., M.S., Ph.D., Carnegie Mellon University, 1963, 1966, 1967. Faculty, Columbia University Graduate School of Business, 1966–93; founder of the Institute for Not-for-Profit Management, Columbia Business School; faculty director of the Institute for Not-for-Profit Management for Jewish Communal Service, 1976–present. Interests in organizational and personal determinants of career progress, organizational structure and management, decision making, and strategic planning.*

This course is concerned with the efficient and effective use of institutional resources in the achievement and fulfillment of institutional mission and values, and the role of the individual in defining the substance and the process of strategy formulation, implementation, and execution. The course will open with a consideration of the challenge to the individual in successfully balancing professional, managerial, and leadership roles in a strategically managed organization. The second part of the course will focus on the governance of the organization and the role of the Board. The final portion of the course will deal with concepts and approaches for the creation and operation of effective organizational systems and processes.

### Financial Management

#### Professor Fred Putney

*B.B.A., University of Washington, 1961; Ph.D., Stanford University Graduate School of Business, 1968. Executive vice president at Brownson, Rehms & Foxworth, 1969 – present; deputy vice-president at Health Sciences Campus, Columbia University, 1970–1981. Interests in accounting and information systems, personal finance and investment planning, and managerial accounting.*

The purpose of the accounting, budgeting, and finance component of the Institute for Day School Management is to provide the participant with a basic set of analytical skills and techniques in the financial management of a nonprofit organization. At the end of this series of classes, the participant will know how to use financial statements, budget documents, and other financial and program reports to manage an effective nonprofit organization. Through the use of course readings, case studies, and lectures, participants will learn how financial management assists the nonprofit manager in making operating, budgeting, and strategic decisions. The lectures will also examine some of the contemporary issues of governance and ethics facing the nonprofit sector today.

### Marketing and Public Relations

#### Professor John Winkleman

*B.A., Clark University, 1977; graduate, Institute for Not-for-Profit Management Executive-Level Program, adjunct faculty, Institute for Not-for-Profit Management, 1997–present; founder of public relations and marketing agency for the not-for-profit industry. Interests in marketing issues, including demographics, research, audits, brand identification, crisis communications, public relations, advertising, strategy, and tactics.*

This course will focus on the concepts and processes of marketing as applied to how an independent school relates to its various “publics.” In this sense, marketing includes such activities as public and community relations, customer-client information and education, and organizational identity and image management. The course will address such concerns as market segmentation and demographic shifts, program development and mix, program pricing, customer satisfaction and retention, and competitor-collaborator analysis (including competition for students, faculty, staff, and volunteers). This course will also explore the ways in which effective marketing supports fund development. Through hands-on components, participants will learn how to construct creative market-focused strategies for their schools, including objectives, positioning, and action plans, and to prepare for crisis communications.

## Resource Development

### Professor Daniel T. Forman

*B.S. and B.A., State University of New York at Buffalo; M.S.W., Boston University Graduate School of Social Work; graduate, Institute for Not-for-Profit Management Executive-Level Program. Vice president for institutional advancement at Yeshiva University, 1995–present; executive director of UJA-Federation's Capital Campaign, 1983–1995. Interests in strategic planning and development.*

The course begins with an overview of philanthropy: Why do donors give? What motivates the largest gifts? How we can leverage philanthropy? What are the key factors for fundraising success? How can a case for major support be created? The course then guides participants in creating a comprehensive development plan. The course explores types of fundraising — annual, capital, endowment, restricted — and a seven-step process for soliciting gifts. It concludes with an exploration of development's role within the institutional structure of day schools, including the executives' and lay leaders' roles and the relationship of marketing and public relations to development.

## Personal Leadership

### Professor Joann Baney

*B.A., University of Chicago; M.B.A., Columbia University Graduate School of Business. Co-founder and vice president of the Professional Development Company; adjunct professor of management communications at Dartmouth College's Tuck School; adjunct professor with Columbia Executive M.B.A.; associate director of the Professional Development Center at Columbia Business School, 1990–1997. Interests in management communications, presentation skills, and interpersonal skills.*

### Professor Lori A. Roth

*B.A., Brandeis University; M.P.P.M., Yale School of Management, 1990; doctoral candidate, Teachers College. Faculty, executive education, Columbia Business School, 2004–present; executive director, Institute for Not-for-Profit Management, 1995–2004. Interests in organizational change, leadership development, conflict resolution, team building, and executive coaching.*

These sessions examine the various lenses the executive draws upon to execute her or his role in the organization: awareness of self, awareness of others, negotiation, mediation, coalition building, and leadership. Through a combination of lectures, case study, role-plays, experiential exercises, and self-report psychometric instruments, participants build emotional intelligence and gain a deep understanding of their personal impact. They learn to direct their enhanced self-awareness toward the development of others through coaching, and toward the development of the organization through leading change. Participants will construct clear leadership messages that draw on personal and institutional values, strategic priorities, and compelling examples from their personal and school histories.

## Special Features

### 360-Degree Feedback and Individual Coaching

Increasingly, high-impact leadership development is achieved through the use of feedback from those who work closely with the individual participant. When offered as part of an educational program, participants have a means to compare their impact as leaders with the best practices they study in the program. Participants will select up to 15 colleagues to receive an online or hard-copy survey through which to offer feedback on behaviors related to four key competency areas: leading the organization, leading as a coach, leading groups, and leading as a person. Participants will receive detailed, confidential reports of their feedback, aggregated by type of respondent (supervisors, peers, and direct reports). Participants will meet with an executive coach to help them derive insights from their feedback and develop action plans for improvement.

### Strategic Management Project Groups

A key component of IDSM is a comprehensive, interdisciplinary application project that participants undertake individually and discuss, at intervals, in facilitated small groups. The assignment guides participants in conducting a strategic analysis of their school as a whole or of a division they oversee. In this way, participants are directly supported by a member of the faculty and a small group of peers as they apply program concepts to issues they currently face. Through peer-group discussions, they practice critical reflection on their work, surfacing assumptions they hold about the organization and its potential, and they explore the complex relationship between the individual division or school and the larger context in which it operates. The first two phases of small-group consultation support the project's development, and the final phases support project implementation.

For further information, please contact:

**Rabbi Elimelech Gottlieb**, Institute for Day School Management  
UJA-Federation of New York, 130 East 59th Street, New York, NY 10022  
Telephone: 1.212.836.1752 | Fax: 1.212.836.1130  
E-mail: [gottliebe@ujafedny.org](mailto:gottliebe@ujafedny.org)

**Institute for Day School Management of the Wiener Educational Center of UJA-Federation of New York  
and the Columbia University Graduate School of Business**

130 East 59th Street • New York, NY 10022 • 1.212.836.1752

## APPLICATION PROCEDURE

To apply for acceptance to the Institute for Day School Management, please submit the following documents together:

- 1) Letter of support from the president or board chair of your school (or head of school, if applicable).
- 2) Completed Participant/Agency Agreement
- 3) Current resume
- 4) Present job description
- 5) Current organizational chart

You will be required to attend an interview as part of the application procedure.

The deadline for submitting an application to the 2007 – 08 Institute for Day School Management is Friday, March 30, 2007.

### UJA-FEDERATION LEADERSHIP

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**Institute for Day School  
Management, Program Manager**

Rabbi Elimelech Gottlieb

**Curriculum Advisory Committee**

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Rabbi Ellis Bloch

Dr. Mildred David

Rabbi Chaim Feuerman, Ed.D.

Rabbi Heshy Glass, Ed.D.

Dr. Steven Lorch

Roanna Shorofsky

*\*Executive Committee member*

**Institute for Day School Management of the Wiener Educational Center of UJA-Federation of New York  
and the Columbia University Graduate School of Business**

130 East 59th Street • New York, NY 10022 • 1.212.836.1752 • gottliebe@ujafedny.org

## APPLICATION FOR ADMISSION 2007 – 08

### PERSONAL INFORMATION

Name \_\_\_\_\_  
First Last Middle Initial

Present title \_\_\_\_\_

Name of School \_\_\_\_\_

School Address \_\_\_\_\_

City State ZIP

Home Address \_\_\_\_\_

City State ZIP

Telephone (W) \_\_\_\_\_ (H) \_\_\_\_\_

Fax \_\_\_\_\_ E-mail \_\_\_\_\_

Are you currently enrolled in a formal or continuing education program? If so, please describe.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### SCHOOL INFORMATION

Please attach an organizational chart for your school.

Describe the nature and scope of your responsibilities.

\_\_\_\_\_  
\_\_\_\_\_

Approximate annual operating budget of your school (or division, if applicable) \_\_\_\_\_

Name and title of person to whom you report \_\_\_\_\_

**PERSONAL STATEMENT**

What are your personal and professional reasons for desiring to enroll in the Institute for Day School Management at this time? Please include conditions, personal interests, and aspirations that you believe will make the institute of value to you.

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In what ways do you expect your school to benefit from your participation in this program?

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I affirm that all of the information contained herein is complete and accurate.

Signature \_\_\_\_\_ Date \_\_\_\_\_

**Please submit your completed Application for Acceptance and all other documents required by the application procedure in one packet. Send complete packet by Friday, March 30, 2007.**

Attn.: Rabbi Elimelech Gottlieb  
The Institute for Day School Management  
UJA-Federation of New York  
130 East 59th Street, Fifth Floor  
New York, NY 10022

Should you have questions regarding the application procedure, please call the Institute for Day School Management at 1.212.836.1752.

## **PARTICIPANT/AGENCY AGREEMENT**

Participant admission to the institute is contingent upon an agreement between the sponsoring agency and the participant. This agreement ensures that there is a serious investment in and commitment to the program both by the agency and the participant. Original forms should be maintained with the participant and agency, and a signed copy should be sent along with the Application for Admission.

### **AGENCY AGREEMENT**

1. The agency will pay the participant's full salary and benefits while the participant is engaged in the institute.
2. The agency will grant paid release time for attendance at all regularly scheduled sessions of the institute.
3. The agency will cooperate with the participant's development of a strategic plan.

### **PARTICIPANT AGREEMENT**

1. The participant will design a strategic plan for the agency.
2. The participant will share the strategic plan with the agency for discussion and possible implementation upon completion of the class work.
3. The participant will disclose any alternate educational programs in which he or she is engaged while at the institute.

The above has been agreed to by the agency and the participant as follows:

Participant's Signature

\_\_\_\_\_ Date \_\_\_\_\_

Agency Executive or Board Representative's Signature

\_\_\_\_\_ Date \_\_\_\_\_

UJA-Federation cares for those in need,  
rescues those in harm's way, and renews  
and strengthens the Jewish people in  
New York, in Israel, and around the world.



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