



THE JACOB RADER MARCUS CENTER OF THE
AMERICAN JEWISH ARCHIVES

MS-831: Jack, Joseph and Morton Mandel Foundation Records, 1980–2008.

Series C: Council for Initiatives in Jewish Education (CIJE). 1988–2003.

Subseries 1: Meetings, 1990–1998.

Box
18

Folder
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Barth, Karen. Meeting. 20 May 1998, 1998.

For more information on this collection, please see the finding aid on the
American Jewish Archives website.

MLM/LP/KAB

5/20/98

1. JEWEL #1
2. 1999 Workplan #2, #3
3. Board Meeting #4
4. Forum #5
5. Mandel Foundation reorganization and implications for CIJE
 - New Board members
 - Fundraising
 - PR
6. Staffing #6



MEMORANDUM

To: Mort Mandel
Lester Pollack

From: Karen A. Barth

Re: JEWEL

Attached are two documents for our discussion this week. The first is a "strawman" plan for JEWEL, which represents our "best thinking" at this early stage of the formal planning process.

The second is an outline of the JEWEL pilot for senior educators that we are suggesting for the 1999 workplan.

We continue to feel that the combination of formal planning and piloting is the best approach to creating a truly excellent leadership development center.

I look forward to discussing this with you.

Karen A. Barth

“STRAWMAN”

Plan for JEWEL

NEED FOR JEWEL

Visionary lay and professional leaders are crucial for bringing about change in Jewish education. Currently there is shortage of senior leaders who can inspire, shape and transform communities, institutions and people. Current programs leave important gaps. Programs for professional leaders:

- Provide few opportunities for in-service development
- Prepare too few leaders
- Offer few opportunities to people interested in moving into Jewish education from other fields
- Provide little development of skills for leading change

In addition there are few, if any, recruiting and development programs targeted for lay leaders in Jewish education.

PURPOSE OF JEWEL

To provide an integrated approach to the recruitment, placement and development of senior lay and professional leaders who are able to vitalize, energize and influence Jewish education in North America and who:

- (1) Have an inspiring vision of their institution or community rooted in Jewish sources and ideas
- (2) Can communicate that vision to others, can bring others on-board, and involve them in refining and implementing the vision
- (3) Can manage a process of transformational change of an entire institution or community including motivating and retraining staff
- (4) Can conduct their work in keeping with Jewish ideas and ethical principles.

Although JEWEL will principally work to develop *educational* leaders for the Jewish community, it will also offer programs for other senior leadership in the Jewish community.

JEWEL CONCEPT

An organization with three closely linked functions

- (1) Recruitment and placement

- (2) Preparation and development
- (3) Planning for personnel needs

Target groups include:

- (1) Professionals (current and potential)
- (2) Lay leaders (current and potential)

RECRUITING

JEWEL will have an active recruiting/placement department that will work on:

- (1) Personnel planning with communities and institutions.
- (2) Recruiting high-potential young people and mid-career people into the field
- (3) Designing and implementing "fast-track" entry-level opportunities for highly talented people entering the field
- (4) Identifying and tracking the stars and potential stars and helping ensure that they get the right career opportunities

DEVELOPMENT PROGRAMS

JEWEL will have a flexible array of training programs but 6 programs will form the core:

- (1) "Stars" program – a program for up-and-coming Jewish education professionals which allows them to move from teaching, programming or other junior positions to senior roles.
- (2) "New Blood" program – a program for highly-talented people who want to enter Jewish education or communal service from other fields (business, law, education, etc.)
- (3) Leaders of training institutions – an ongoing series of conferences and training opportunities for the leaders of rabbinic seminaries and institutions that train communal and educational leaders. This will be designed to "infiltrate" the existing system of pre-service training with JEWEL's philosophy.
- (4) "Custom" programs – custom-designed programs for organizations that want to train for specific roles (e.g. JCC directors, Federation directors, Hillel directors, Continuity Commission leadership, etc.)
- (5) Lay Leadership programs – an "on-the-road" training program for senior educational lay leaders which may (or may not) include a National Leadership forum every 2 – 5 years.
- (6) The ongoing cohorts of TEI

Other programs that might eventually become part of JEWEL include:

- (1) A principal's center like the one at Harvard with multiple week-long topical seminars for principals and leaders of Jewish educational institutions.
- (2) A center for the training of Jewish foundation professional and lay leaders on issues in funding Jewish education.

CURRICULUM

- The core curriculum will have 2 parts:
 - (1) Developing a personal vision
 - Jewish texts and philosophy
 - Educational theory and practice
 - (2) Leading an institution
 - Personal leadership qualities
 - Change management
 - Planning
 - Communication skills
 - Lay/professional relations
 - (3) In addition curricula will be developed for customized target groups or individuals
 - (4) Field work, mentoring and job placement will be an *integral* part of the program

KEY INSTITUTIONAL CHARACTERISTICS

- Full time director
- Small core faculty / extended adjunct faculty
- Has its own facility – though some programs will take place elsewhere
- Affiliated with a major university (or universities) with a top quality school of education and business school
- Closely linked to both CIJE and CAPE

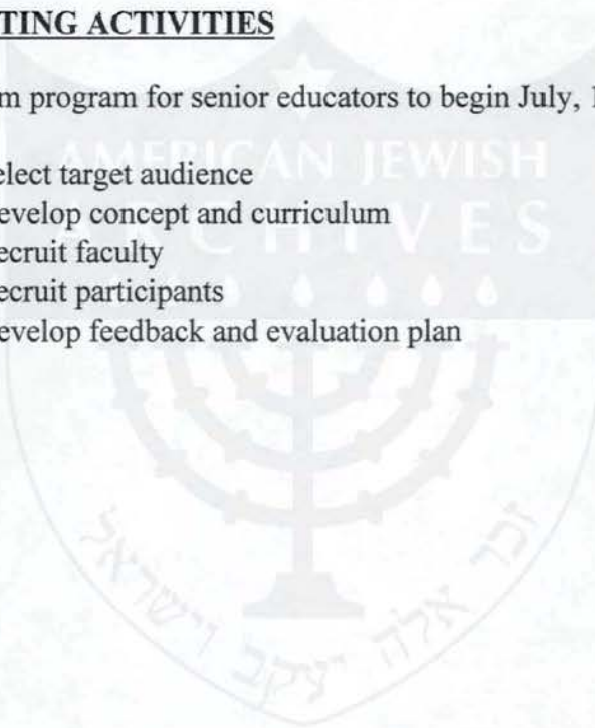
NEXT STEP PLANNING ACTIVITIES (IN PROCESS)

- Scans of leadership training in various domains
 - Business
 - Education
 - Non-Profit/ Public sector

- Board/ lay development
 - Jewish communal/institutional
- Needs Assessment
 - Communities
 - Institutions
- Study of texts about “leading Jewishly”
- Business planning
- Implementation planning

NEXT STEP PILOTING ACTIVITIES

- Develop long term program for senior educators to begin July, 1999
 - Select target audience
 - Develop concept and curriculum
 - Recruit faculty
 - Recruit participants
 - Develop feedback and evaluation plan



PROPOSED TIME TABLE

	1998	1999	2000	2001	2002
Finish Business Plan	●	●			
Hire Director		●	●		
Hire Faculty for Pilot	●	●			
Start Lay Pilot		●	●		
Start Professional Pilot		●	●	●	
Look for site		●	●		
Start 1 more program			●	●	●
Start 1 more program				●	●
Start 1 more program					●

JEWEL PILOT DRAFT OUTLINE

Overview: A long-term, transdenominational development program for senior educators

Audience: Senior “stars” from the field plus a few people from other fields who are senior “stars” in their current careers.

Venue: Linked with a “name” institution of higher education (e.g. Harvard, Columbia, Brandeis)

Cohort size: 10-15

Length of program: 2 years plus 1 summer

Format: Local weekly studies (½ – 1 day per week)
6 times per year – Sunday through Thursday
4 week summer program in Israel

Start date: July, 1999

Curriculum:

- Vision
- Jewish studies
- Educational theory and practice
- Leadership qualities and skills

Custom curriculum:

- Each participant will have a customized program designed to fill in any gaps
- Field work, mentoring, and placement will be an integral part of the program

Leadership team

- Ellen Goldring and Gail Dorph

**DRAFT
WORKPLAN 1999 (18 months)**

		1998	1999
JEWEL	Planning	Planning Process	Complete
	Pilots	TEI	Continues
		Rabbinic conference	Continues
		High School Leadership	Continues
			"Stars Program"
			Lay Leadership Pilot
CFWW	Planning	Planning Process	Launch
	Pilots	Torah Umesorah	
		JTS	Continues
			JCCA
		She'arim	
R & D		Indicators	Becomes a test site
		Synagogue Change	Becomes a field project and publication
		Economics of Jewish education	Becomes a test site
		Early Childhood	Becomes a field project
Publications		Teachers' Report	
		Leaders' Report	
			Policy brief on professional development
			Synagogue Change research
			Policy brief on rabbinic education?

LEADING UP TO 8/27 MEETING AT MPP

#3

	May			June					July				August			
WEEK OF	11	18	25	1	8	15	22	29	6	13	20	27	3	10	17	24
LP/KAB	X															
LP/MLM	X															
MLM/LP/KAB 5/20		X														
KAB/SF 5/21		X														
KAB/LP					X											
KAB/Chuck – TB sched					X											
KAB/Stanley – TB sched					X											
KAB/John – TB sched					X											
KAB/Steve – 6/10					X											
CIJE Board Meeting							X									
KAB in Israel																
MLM/KAB telecon									X							
LP/KAB telecon – TB sched										X						
2 nd reviews with Steve, Chuck Stanley																
2 nd review with MLM/LP – TB sched																
CIJE Board Meeting																X
MPP Board Meeting																X

DRAFT AGENDA
JUNE 23rd BOARD MEETING

9:00 am – 10:00 am	Intros & Minutes
10:00 am – 11:00 am	Economics of Jewish education
11:00 am – 12:15 pm	1999 work plan
12:15 pm – 1:00 pm	Lunch
1:00 pm – 2:00 pm	CIJE's work in Teacher Education
	<ul style="list-style-type: none">• the work of TEI graduates• She'arim
2:00 pm – 2:45 pm	Our external image
2:45 pm – 3:30 pm	Updates

May 13, 1998

Karen Barth
Nessa Rapaport
CIJE
15 East 26th Street
New York, New York 10010-1579

Dear Karen and Nessa:

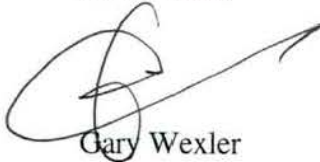
As we discussed, the starting point for our discussion on the marketing issues for CIJE begins with the following four central questions:

1. What is the problem(s) this marketing effort will be trying to solve?
2. What is CIJE "selling" on a tangible level?
3. What is CIJE "selling" on an emotional level? What part of the Jewish soul is CIJE "selling"?
4. To whom is CIJE "selling"?

I believe that I can tackle these questions within the forty-five minute time allotment. I will need an easel, flip chart and black marker.

I look forward to working with you.

All the best,



Gary Wexler

The Leadership Forum for Jewish Education

Planning Status Report

Leadership Forum for Jewish Education: Today's Discussion

- A First Cut at the Program
- Marketing Strategy
- Discussion of Our Next Steps



OVERALL THEME AND MESSAGE

(what we want people to walk away with)

THEME: Revitalizing our institutions

MESSAGE: The key levers for creating great

Jewish educational institutions are:

- *Leadership*
- *Effective Change Programs*
- *Broader Funding Options*
- *Accountability*

Key Topical Themes and Messages

Themes	Messages
Leadership	We have a leadership crisis which demands a major rethinking of the way we recruit, train and employ educational leaders – both lay and professional – and national, focused action.
Institutional Change	Improving our educational institutions will require significant reengineering at the institutional level (not just programmatic changes). Although this is a long and difficult process, it can be done if the right factors are in place.
Measuring Ourselves	We need accountability and better ways of measuring success to insure that investments in Jewish education are well spent.
Economics	Jewish Education is under-funded and funds are misallocated. We need out-of-the-box approaches and a change of mindset.

WHAT WE HOPE THEY WILL DO AFTER THE FORUM

Leadership

Push for changes in the way professional Jewish educational leaders are recruited and trained, and the way they are treated in their jobs. Redesign approaches to lay involvement!

Institutional Change

AMERICAN JEWISH
A R

Becomes advocates for and support projects that help a whole institutional to change; understand what makes these projects work or not work.

Funding

Develop innovative approaches to the funding of Jewish education.

Accountability

Support serious efforts to measure the outcomes understand the difference between effective and superficial outcome measures.

BASIC APPROACH TO EACH TOPIC

Opening Speaker	Frames the issues	10 minutes
Presentation of research	Sheds light on the issues	20 minutes
Panel presenting things that are being tried	Gives some ideas	30 minutes
Group discussion of the issues	Involves participants in thinking about ideas & solutions	45 minutes
Closing Speaker	Synthesizes & summarizes	15 minutes
	Breaks	20 minutes
	Total with breaks	150 minutes (2½ hours)

Introduction

- Welcome & Overview
- Text Study - Adin Stensaltz
- Discussion of what makes great Jewish education (film?)
- Inspirational speaker

Rough Schedule

Sunday

Lunch and Registration

2:00 pm

Welcome & Overview

2:30 pm

Text Study

3:30 pm

Discussion Groups

4:30 pm

Wrap up

4:45 pm – 6:00 pm

Break

6:00 pm – 8:00 pm

Dinner

8:00 pm – 9:00 pm

Speaker

Monday

9:00 am – 12:00 pm

Track 1 & 3

12:00 pm – 1:00pm

Lunch

1:00 pm – 4:00 pm

Track 2 & 4

5:00 pm – 7:00 pm

Track 1 & 3

7:00 pm – 9:00 pm

Dinner

Tuesday

9 am – 10:00 am

Finish tracks 1 & 3

10:15 am – 12:00 pm

Tracks 2 & 4

12:00 pm – 2:00 pm

Lunch

2:00 pm – 2:30 pm

Wrap up & Farewell

2:30 pm – 3:30pm

Discussion on next steps

(for those who are
interested)

Preliminary Ideas

Professional and Lay Leadership – Track #1

Possible Inside Work	Possible Outside Speakers	Possible Message
Ellen Goldring & Adam Gamoran (professional leaders research)	Ron Heifetz (Director of the Leadership Center at The Kennedy School)	The current state of professional leader's preparation is very poor
Pearl Beck (lay leader research)	Reynold Levy (Author of a book on lay leaders & philanthropy)	Training professionals as change agents requires a different kind of approach
JEWEL Needs Assessments: JEWEL Scans/CAPE Research	Judith McLaughlin (a head of Leadership Development Program at Harvard)	We are missing out on the opportunity to involve some of the best potential lay leaders
	Larry Hoffman (Clergy 2000)	Lay leadership development may require a change of lay structures & roles in Jewish Educational institutions

Institutional Change – Track #2

Possible Inside Work	Possible Outside Speakers	Possible Message
Synagogue Change Research	Mike Hammer (Inventor of the concept of Reengineering) Seymour Fox on vision John Katzenbach (Head of the Change Center at McKinsey)	How redesigning educational institutions can enhance our effort at continuity How vision can become the key driver of change Why Jewish educational institutions need to change

Measuring Outcomes – Track #3

Possible Inside Work	Possible Outside Speakers	Possible Message
Indicator Papers (Adam)	Barbara Schneider	The role of social indicators in driving social change Where are we: The current strengths and weaknesses of our techniques for measuring outcomes

Economics – Track #4

Possible Inside Work	Possible Outside Speakers	Possible Message
Economics research	Hank Levin Mike Smith (Undersecretary of Education)	There are different ways of looking at the funding of Jewish education based on using public financing models in the field of general education

PROPOSED MARKETING STRATEGY

Announcements	Announcement letter to 100 key leaders inviting their input
Megagivers	Personal phone calls from MLM, LP
Foundation Principals (<i>top 25 foundations</i>)	Personal calls from Board members
Community strategy	<ul style="list-style-type: none">• Select “point” person/team in each of 20 key communities (someone we know)• Staff meet with point person to generate excitement• With help of point person and staff, network to create list of invites from that community• Send letter of invitation• Personal call from point person, board member or staff
National Agencies	Personal calls from Board or Advisory Board
Professionals – All	Letter followed by personal call from staff member

MARKETING: OPTION 1

1998

1999

[illegible]

MARKETING: OPTION 2

	1998												1999												2000			
Action	Lay	Pro	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A		
Networking to get list of names		✓	●				●																					
Advisory Board meeting	✓	✓					●																					
Calls for Advisory Board	✓	✓	●	●																								
Call megagivers	✓		●				●																					
Meetings in 15 – 20 communities	✓	✓					●										●											
Calls to 200 potential lay invitees	✓										●						●											
Calls to 100 potential professional invitees		✓									●						●											
Hold the date		✓											●															
Program institution		✓															●											
Final registration																							●					
Conference																								●		●		
Smaller programs?																												
Pre-GA program										●							●											
Pilot JEWEL program												●												●				
Jewish Funders Network							●										●					●						

NEXT STEPS – KEY DECISIONS

- Go or No Go
- Marketing Strategy
- Date
- Program Outline

