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The Experiment in Congregational Education, 1993.

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MEMORANDUM

TO: CIJE Staff and Consultants
FROM: Shulmaith Elster
RE: HUC Consultation - May 17-18, 1993

I. Participant list is attached. Please note:

Rabbi Robert Orkard of Westpoint, Connecticut is the New Chair of the Commission on Jewish Education of the Reform Movement.

II. Role of Mandel Associated Foundations and its financial support was acknowledged as was Sara's participation in the Commission. Twersky's vision statement for the Commission was the D'var Torah for the Tuesday session.

III. Program (Sessions I-VII program attached).

IV. List of preliminary papers and their authors.

Larry Cuban: Changing Public Schools and Changing Congregational Schools

Joe Reimer: where School and Synagogues Are Joined

Susan Shevitz: Receptive Contexts and Enabling Traits for Changing Congregational Education

Isa Aron: From the Congregational School to the Learning Congregation: Are We Ready for a Paradigm Shift?

Riv-Ellen Priel: Reflections on the Social Sciences of American Jews and Its Implication for Jewish Education

PARTICIPATION LIST

HUC

Isa Aron
Bill Cutter
Michael Zeldin
Sara Lee
Lee Bycel (Dean, HUC, LA)
Laura Samuels (graduate student at University of Cincinnati
and HUC)
Sherry Blumberg (New York)

STANFORD

Lee Shulman
Larry Cuban
4 graduate students

BRANDEIS

Joe Reimer
Susan Shevitz

REFORM MOVEMENT

Seymour Rossel (UAHC)
Bob Orkard
Shelly Zimmerman (CCAR)
Michael Weinberg (CAJE)
Kyla Epstein-Asor (Cleveland)

OTHERS

Jeff Schein*
Barry Shrage*
Sharon Feiman-Nemser
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CIJE

Barry Holtz
Shulamith Elster

*CIJE Senior Advisors

Laying the Groundwork for the Experiment in Congregational Education

Rhea Hirsch School of Education
Hebrew Union College-Jewish Institute of Religion
in partnership with
The Commission on Jewish Education for the Reform Movement

The Problems of Congregational Schools

It is estimated that 80% of Jewish children in America will attend a Jewish school at some point in their lives. For over two thirds of these students, that school will be a supplementary school under congregational auspices. Critiques of the supplementary school date back to the 1880's, and have remained remarkably constant over the years. Supplementary schools having been faulted for being boring and irrelevant, having unqualified teachers, and lacking substantive parental involvement and support. In many urban centers the problems of supplementary schools have deepened, as day schools have siphoned some of the most committed parents, as well as the most professional teachers. These problems combine to limit the supplementary school in its ability to provide its students with either substantial knowledge of or a deep commitment to Jewish life. Despite numerous attempts to address these problems through curricular revisions and programmatic innovations, the essential structure and organization of most congregational schools has not changed much since the 1950's.

The Role of the Rhea Hirsch School of Education in Improving Congregational Education

The RHSOE, the Reform Movement's premier graduate program for the training of professionals in Jewish education, was founded in 1969. The school has over 150 alumni who serve in congregations, schools, camps, universities and other educational institutions throughout North America, and in England and Israel as well.

During the spring and summer of 1992, RHSOE faculty and staff engaged in a strategic planning process, which was supported, in part, by the Mandel Associated Foundations. In the course of our deliberations we became convinced that the RHSOE must not only prepare future educators, but also work more directly towards the improvement of settings in which our graduates work. While it would be unrealistic to expect that we could work intensively with hundreds of schools, camps, and Jewish centers, the RHSOE might well serve as a catalyst for improving these institutions through very targeted experiments, such as the Experiment in Congregational Education. A second grant from the Mandel Foundation enabled us to initiate the ECE in partnership with the Commission on Jewish Education.

The Experiment in Congregational Education

The purpose of the ECE is to stimulate a revitalization and re-configuration of congregational education. The ECE will bring together a small number of congregations (between four and eight) which will work together to re-think their notions of Jewish education and explore ways of restructuring their educational programs. Over the course of a three year period, these congregations will engage in a process of examining: what their goals are for Jewish education; what changes in their current institution will meet both their needs and their goals; and what resources will be required to institute these changes? As answers to these questions become clear, each of the congregations will develop and implement a plan for the reconfiguration of the totality of its educational programming.

The ECE is not undertaken with any fixed idea of the the final product that will emerge from the process of reconfiguration. It is likely that a number of different new structures will emerge, perhaps as many new models as there are partners in the ECE. But while we have no preconceived notion of the new structures which the experiment will yield, we do have some very strong convictions about the process which each congregation involved in the experiment will have to undergo. Our reading of research in educational innovation in the public sector and our first-hand experience working with congregational schools have led us to the conviction that school restructuring can only be successful when the process of deciding on the new structure is both broad and deep. The entire spectrum of congregational membership must be represented in this process, which must involve incisive probing into people's Jewish identities, commitments, needs, and values.

Beyond its immediate benefit in the improvement of education in a number of congregations, the ultimate contribution of the ECE will be to the entire field of Jewish education. After four years of analysis, intervention and documentation, we will have a much more sophisticated understanding of the internal dynamics of education in the congregational setting, and the possibilities for change in Jewish education. We will have a number of viable models of restructured institutions, and a wide range of new programmatic alternatives. We hope to use this knowledge in the creation (four years hence) of a "Laboratory for Congregational Education," which will serve as a resource to a larger number of congregations.

Phase One: The Initial Consultation

A new and complicated undertaking, such as the ECE, requires input from a variety of sources. In launching the ECE, we wanted to draw on the expertise of scholars and researchers in related fields, as well as congregational leaders from a range of settings. Thanks to a grant from the Nathan Cummings Foundation, a group of 25-30 scholars and congregational leaders with prior

experience and expertise in this area will be brought together for a two-day consultation in May, 1993.

The goals of this consultation are:

- 1) To gain a deeper understanding of what it will take to assist congregations in reconceptualizing and restructuring the full range of their educational offerings.
- 2) To be in a position to decide:
 - a) how the consortium of congregations might operate;
 - b) how partners in the consortium might be selected;
 - c) how research at each site might be conducted.

While decisions of this sort will probably not be reached at the consultation itself, the issues involved in making these decisions will be discussed.

We have attempted to structure the consultation in such a way as to permit each participant to share his or her knowledge and expertise, and the group as a whole to break new ground in applying its collective wisdom to the task at hand. Five papers have been commissioned which cover five relevant areas of scholarship:

- a) *What do the Jewish social sciences have to teach us about the current state of congregational education? What can we infer from the work of sociologists and anthropologists about the prospects for changing our current structures?* This paper will be written by Riv-Ellen Prell, professor of anthropology at the University of Minnesota.
- b) *What are the cultural, economic and political forces internal to congregations which result in particular educational arrangements, and how might these forces be harnessed to expedite the process of restructuring?* This paper will be written by Joseph Reimer, professor of Jewish education at Brandeis University.
- c) *What processes will enable congregations to reconceptualize their educational programs and to prepare themselves for change?* This paper will be written by Susan Shevitz, professor of Jewish education at Brandeis University.
- d) *What accounts for the durability of the dominant model of supplementary schooling? What attempts have been made to break this mold? Is fundamental restructuring necessary? Is it possible? How does it differ from innovation in a particular area?* This paper will be written by Isa Aron, professor of Jewish education at the Rhea Hirsch School of Education, HUC-JIR.

- e) *What can we learn from the past two decades of innovation in American public schools that might be applicable to the private, voluntary, part-time, anarchic non-system of congregational education?* This paper will be written by Larry Cuban, professor of education at Stanford University.

These papers will be sent out in advance, several weeks prior to the consultation. Participants will be asked to respond to the issues raised in the papers, based on their particular experience and expertise. Then the group will work together to define, outline and adumbrate the process of restructuring congregational education.



RHEA HIRSCH SCHOOL OF EDUCATION
Hebrew Union College-Jewish Institute of Religion

Reconceptualizing Congregational Education
Tentative Program for Consultation on May 17-18, 1993

Introduction

The Synergy Required to Arrive at a New Vision or Paradigm of Congregational Education

SESSION I

The mission of congregations and congregational education
(Monday morning)

What ought to be the mission of congregations? What should the role of Jewish education be, within this larger mission?

Drawing on our own knowledge, and our reading of the papers, we will contrast ideal views with the current realities.

SESSION II

What operating assumptions guide our current paradigm of congregational education? (Monday afternoon)

What are the implications of the assumptions that undergird current paradigms of Jewish education? What might we want/need to challenge in some of these assumptions?

SESSION III

What is Jewish learning? What power does it have to shape and transform people's lives? (Monday evening)

What experiences of Jewish learning in our own lives were transformative? What factors made them so powerful? What circumstances might make these kinds of experiences more common for members of congregations?

SESSION IV

Deriving conceptual principles as a guide for reconceptualizing congregational education. (Tuesday morning)

What core affirmations and assumptions would be consonant with an enhanced vision for congregational education? What conceptual principles can we affirm?

SESSION V

What are the forces that enhance or inhibit change in congregations? (Tuesday morning and afternoon)

Presentations by representatives of Leo Baeck Temple in Los Angeles and Congregation Beth Am in Los Altos Hills, on the process of restructuring education in their congregations.

What can we learn from these two case studies about the necessary pre-conditions for restructuring, and guidelines for the process itself? From this, we will derive a set of operational principles for restructuring congregational education.

SESSION VI

Where do we go from here? (Tuesday afternoon)

Presentation on how a coalition might work, drawing on several models.

Review of the "principles" arrived at in previous sessions; discussion of the relationship between the two types of principles.

Next Steps





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December 27, 1993

Professor Adam Gamoran
University of Wisconsin at Madison
Center for Educational Research
1025 Johnson Street
Madison, WI 53706

Dear Adam,

Enclosed, finally, is a copy of the latest revision of the "ECE Protocol and Description." Of special relevance to the CIJE, and our ongoing discussion of Roberta Goodman's participation in the ECE, are two important changes:

- The ECE will no longer require the congregation to have a separate research team. Research gets folded into "critical reflection" activities undertaken by the task force, and is the responsibility of the ECE adviser to write up.
- The title "Research Team Leader" (the ECE staff member assigned to work with the congregation) has been changed to "Adviser," to reflect a greater emphasis on offering support to the congregation, and a lesser emphasis on research.

These changes respond to the congregations' requests to make the project more affordable, in terms of both money and person-power.

One more important piece of information: we have decided not to work with an Atlanta congregation.

I'm hoping you, Alan, and the others, will be able to decide on whether or not Roberta can be assigned to this project within a month or six weeks. Two possibilities suggest themselves:

- a) that you assign her solely as a researcher, and we hire an additional advisor for Milwaukee; we could then negotiate the percentage of Roberta's time to be spent on this project.
- b) that you decide that the functions of "adviser" and "researcher" can be intermingled; this might demand a bit more of Roberta's time, perhaps 30 days a year, instead of 20, as originally thought.

In making this decision, I know that you'll be thinking, first and foremost, about what's best for the CIJE. I do hope, however, that you'll bear in mind the arguments that made you willing to consider sharing Roberta with us in the first place: it would *still* be important for the CIJE to study an example of transformational change at the congregational level; and it would *still* be good for our two acronyms (CIJE and ECE) to work on a joint project.

If there is any additional information you need from me, please let me know.

B'Shalom,



Isa



The Experiment in Congregational Education
Description and Protocol – Draft 3
Tevet, 5754

What is the Experiment in Congregational Education?

The Experiment in Congregational Education (ECE) is a project undertaken by HUC - JIR's Rhea Hirsch School of Education (RHSEO) in cooperation with the UAHC Commission on Jewish Education. The ECE will bring together a small number of Reform congregations (between four and six) to re-think and re-structure the *full* range of their educational programs, as they affect *all* age groups. Its ultimate goal is to widen the definition of education in the congregational setting, and to assist congregations in their efforts to transform themselves into learning communities.

What Values and Beliefs Underlie the ECE?

Central to the project are a number of beliefs about the nature of *congregational education*, and the value of experimentation:

We see the *congregation* as the primary Jewish community for Reform Jews. The congregation's mission is to provide opportunities for its members to participate more fully in *Torah* (learning), *Avodah* (worship), and *G'milut Hasadim* (acts of kindness and justice), the three pillars of the Jewish Tradition. In the Jewish Tradition the study of *Torah* is seen as both an end in itself (*Torah lishma*) and as a vehicle for a number of inter-related goals: enriching the Jewish lives of individuals; creating and sustaining a sense of community; linking local communities to one another and to the Jewish people as a whole.

Every aspect of the congregation's life, from services and sermons to fundraising and management, is a potential arena for the study of *Torah*. Too often, however, *congregational education* has been limited by the assumption that it should consist primarily of schooling for children. In recent years the importance of education has become evident, not just as a foundation for adulthood, but as a life-long activity for committed Jews. Congregations today face the challenge of re-thinking and re-designing their educational programs to increase the level of *Torah* study for all members. This process will require the involvement of key congregational leaders, and of representatives of the full spectrum of the membership as well.

This attempt at self conscious re-conceptualization of education in Reform congregations represents a departure from previous efforts at Jewish

educational reform. In choosing to participate in this project congregations are entering uncharted territory; neither the process nor its results can be fully predicted ahead of time. Thus, the title "*Experiment* in Congregational Education." Among the consultants to the ECE are nationally known experts in organizational and educational change, as well as congregational leaders who are engaged in similar attempts at re-configuration. Even so, the ECE's approach to reforming congregational education is, as yet, untested.

There is a second reason for our use of the term *experiment*, and that relates to the critical role of research in this project. Too often in Jewish life, changes are initiated without any provisions being made for documentation. Thus, whatever the project's outcomes, outside observers (and even the key actors themselves) are no closer to an understanding of the change process or the determinants of success than they were before. The ECE has been designed to assure that what transpires in the participating congregations (both process and outcomes) will be studied, and that the insights gained from these experiences will be available to congregations which attempt similar reforms in the future.

But while research is central to the ECE, the kind of research to be conducted is different from more conventional social science research, in which outside observers collect and analyze the data. Congregations which join the ECE will engage in *participatory action research*, in which the professionals and members of the congregation will participate in the research effort. Proponents of participatory action research, which is relatively new (though increasingly popular) in the field of education, claim that it has three important advantages over more conventional research: First, by participating in the process of research, those attempting change are provided an opportunity to reflect critically on their activities. Second, participatory action research provides a continual feedback loop; this process of *formative* (rather than *summative*) evaluation means that participants don't have to wait until the conclusion of the project to catch their mistakes, but can provide corrections mid-course. Finally, the knowledge generated through participatory action research is more useful to practitioners than the knowledge obtained by more conventional research. Since participants contribute to the creation of the research questions, the findings are less academic and more relevant to their practical concerns.

Three additional assumptions undergird this project:

Education in the congregational setting calls for changes that are broad and systemic. Congregations have tended to view education as synonymous with schooling; and past efforts to improve the congregational school have tended to be additive and incremental, taking the existent structures as given, and instituting new curricula, teacher training, or (most recently) family education. The ECE is based on the assumption that these limited changes

have led, at best, to limited outcomes. The challenges facing Reform Jewry call for changes that are more dramatic and far-reaching -- in a word, *transformational*.

Transformational change can only occur when an institution's key stakeholders are prepared to explore and challenge one another's core values and assumptions. This process is arduous and risky, bringing to the surface conflicts and contradictions that may have heretofore been glossed over. Its rewards, however, are many: for individual participants, new insight and deeper understandings; for the institution as a whole, a heightened sense of community and a renewed sense of purpose.

The discussion of the core values and assumptions of congregational education must be set in a Jewish context. Jewish texts, Jewish concepts and Jewish activities must serve as points of reference throughout. The process of exploration itself must be a form of *talmud torah*; participants must never lose sight of the fact that they are engaged in a holy task.

What are the ECE's goals for its first three years?

While each participating congregation will set its own specific goals, we expect that participating congregations will accomplish the following:

- Evolve a collective vision of the congregation as a *kehilla kedosha*, a holy community, and of the place of Jewish learning within that community.
- Arrive at consensus on what it means to be an educated, committed and practicing Reform Jew within that *kehilla*. The articulation of this vision must derive from a serious discussion of the place of classical Jewish texts, ritual practice, the Hebrew language, social action, and the land of Israel in the life of a committed Reform Jew. While every congregation in the ECE will probably arrive at a different statement of its vision, the traditional touchstones to be considered will be the same for all.
- Agree on a long-term plan for re-structuring the congregation's educational programs, in order to help all its members become educated Jews.
- Implement a number of more immediate changes that will move the congregation towards its long-term goals
- Develop a communication mechanism whereby members of the congregation can be informed of and participate in the shaping of the vision and the long-range plan.
- Share their understanding of the process unfolding in the congregation with a staff member of the ECE. This will enable the ECE to create a written record of both the issues that have been explored, and the processes through which this exploration has taken place.

What will congregations participating in the ECE do? What activities will the project entail?

While the specific issues facing the participating congregations will vary according to their particular circumstances and needs, a common pattern will guide their activities:

Convening a Task Force

Each congregation will convene an educational task force, whose purpose is three-fold:

- a) to serve as the catalyst and focal point for a myriad of conversations aimed at articulating a vision of Jewish life and Jewish education;
Some of the issues particularly salient for members of the task force might be:
 - What are the essential elements of being a literate Jew? Are knowledge of Hebrew and a facility with traditional texts criteria for Jewish literacy?
 - What should the relationship of the Bar/Bat Mitzvah ceremony be to the achievement of Jewish literacy?
 - What constitutes a Jewish role model? To what extent are those who serve in a teaching capacity role models for their students?To initiate and sustain these conversations the task force might employ parlor meetings, speakers, sermons, articles in the bulletin, and so on.
- b) to inquire into every aspect of the current educational program; to assess its strengths and limitations as measured against the task force's ideal vision; to investigate alternative institutional arrangements and educational modalities; and to derive from this inquiry a plan for restructuring. The full plan may take a year or more to formulate, and several additional years to implement (although parts of the plan will be amenable to implementation much sooner, as discussed below). At every step the task force should involve as many members as possible in its deliberations, and utilize a variety of mechanisms to keep members informed of its decisions.
- c) to institute a series of smaller, more immediate innovations that will be steps towards the ultimate goal; to use these changes as testing grounds for their ideas. For example, the congregation might:
 - broaden its conception of "teacher," and recruit a larger number of individuals to serve the congregation in some educative capacity;
 - create new mechanisms for trans-generational education;
 - give educational themes more visibility in its public events.

The task force should meet 6 - 8 times over the course of a year, attempting (wherever possible) to meet for extended periods of time in surroundings which are conducive to dialogue and reflection.

Task Force Membership

The task force should represent a broad range of stakeholders in the congregation, including: the rabbi(s), the educator(s), and other senior professionals, teachers and other staff members, lay leaders (e.g., the chairs of the Board and the education committee), and congregants ranging in age as well as level of involvement in synagogue life.

A respected lay leader who can champion the cause of congregation-wide education should serve as Chair of the task force. One or more congregational leaders with a breadth of educational vision should also be recruited.

Serving in the capacity of "staff" should be a Coordinator, who will oversee the work of various subcommittees, gather the requisite information and resource materials, maintain constant communication with members of both the task force and the congregation at large, and perform other functions aimed at facilitating the task force's work. We project that the Coordinator may require as much as a day a week to fulfill these responsibilities. Each congregation will have to decide whether the Coordinator ought to be a professional (e.g., the educator), who would be relieved of some of his or her other responsibilities, or a lay person with experience in group facilitation, familiarity with Jewish educational settings, and a Judaic background.

The ECE Advisor and Consultants

Each congregation will have an ECE Advisor, whose responsibilities will be two-fold: a) to assist the task force in its work, and b) to conduct research on the process of re-conceptualization and change. The Advisor, who will be hired and paid by the ECE, will visit the congregation several times a year (at the ECE's expense), and be available by telephone between visits. S/he will work closely with the task force Chair and Coordinator, serving as a broker between the congregation and ECE consultants with special expertise in Jewish education, planning, group process, and educational change.

Depending upon its composition and its needs, the task force may also require external assistance in planning, facilitation, data collection, and/or critical reflection. As needed, these skills will be provided by the ECE staff and its consultants at no cost to the congregation.

Participation in the ECE's Research Effort

As indicated above, the ECE Advisor will be responsible for studying both the process and the outcomes of the work of the educational task force.

Depending on the abilities and interests of task force members, this research may be more limited or more expansive in scope. At the minimum, it will

include participation in critical reflection activities at regular intervals. The advisor will document and write up these activities; s/he may also observe other congregational activities, and interview key informants.

In addition, the task force may designate one or more of its members to perform some of the following functions:

- collect baseline data on current educational programs;
- study the various subcommunities within the synagogue, their needs, interests and patterns of interaction with other subcommunities;
- keep an anecdotal record of the work of the task force;
- collect data on the tangible outcomes of restructuring.

The ECE Advisor will assist in the planning and coordination of these activities.

Networking with Other Congregations

Participating congregations will have other opportunities to share resources and work collaboratively on specific issues, such as the recruitment and training of educational staff, curriculum development, and family education. The ECE will have on its staff a "network manager," responsible for creating and sustaining networks among congregations. This person will also help the congregations find needed educational resources.

Three times during the course of the project, leadership teams from each of the participating congregations will come together for two or three days, for discussions of common concerns, and workshops on such topics as planning, and educational change.

What kinds of congregations is the ECE looking for?

From the perspective of the ECE, the primary criterion for a congregation's participation in this project is its commitment to deliberate for an extended period of time on a number of key issues: its ideal for itself as a *kehilla* (community); the role of education within the *kehilla*; and the fit between its current educational programs and this ideal.

Congregations who join the ECE must share the view that education is the purview of the entire synagogue, rather than just the school. Top lay and professional leaders must become actively involved in the task force process, and be able to sustain their commitment for a number of years. In addition, a wide range of members should be represented in the task force.

A third characteristic of participating congregations must be their willingness to take a number of risks: to re-think and revise some of their assumptions; to

explore alternative institutional arrangements; and to allow their deliberations to be written up and shared publicly as part of the research.

What will the congregation receive from the ECE?

- assistance in structuring its deliberations regarding Jewish life and Jewish education;
- assistance in strategic planning;
- support from the ECE Advisor and a limited number of free consultations from the ECE consultants;
- specific expertise in areas of Jewish education, such as curriculum and staff development;
- guidance through a process of critical reflection;
- opportunities to network with other congregations undertaking similar efforts;
- assistance in raising funds from local and national foundations, to cover the cost of hiring the Coordinator, sending teams to ECE workshops, and other task force expenses.

What commitments must a congregation make to the ECE?

- to convene a high profile task force in which the various constituents of the congregation are represented.
- to designate a task force Coordinator, who will be able to devote approximately one day a week to the project. This person might be an educational professional (relieved of other responsibilities to accommodate this task) or a lay leader with expertise in education, organizational development or planning.
- to cooperate with the ECE Advisor's efforts to document the planning process through questionnaires, observations and interviews; to allow results of this research (subject to review by the congregation) to be disseminated.
- to assume the travel costs for a team of at least three task force members to travel to three ECE workshops over a three year period. The ECE has a limited fund for defraying a portion of these costs, and will assist the congregation in raising funds from outside agencies.

How should a congregation decide whether or not to join the ECE?

The decision to join the ECE should be made through a series of explorations and conversations with an ever-widening circle of participants, according to the following schedule:

Initial Conversations

- At least four key leaders should be involved in the initial conversation: the senior rabbi, the educator, the congregation president, and a lay leader with educational responsibilities. This group might begin by reading this document very carefully, noting areas of agreement and disagreement, questions and concerns.
- After this group has had a chance to discuss the document, a conference call should be arranged with Dr. Isa Aron, Director of the ECE. During this conversation, questions will be answered and specific issues discussed.

Expression of Interest

If the group finds itself in agreement with the major premises of this document, and feels that it can meet the expectations delineated above, it should designate one or more of its members to summarize the main points of their conversations in a written "expression of interest," comprised of the following:

- 1) a cover letter, indicating the congregation's interest in joining the ECE, and its ability to:
 - convene a high level task force;
 - engage a Coordinator for a period of two and a half years;
 - allocate funds for travel over a period of two and a half years.This letter should be signed by the congregation's president and senior rabbi.
- 2) a short essay (1-2 pages) addressing the following questions:
 - Why is the congregation interested in joining the ECE?
 - What are the leadership's current thoughts about the nature of the synagogue community, and the role of Jewish education within that community?
 - How would participation in the ECE fit with the congregation's other spheres of activity and special foci?
 - With what "big issues" is the congregation grappling at the present moment? How might these issues impact on the work of the task force? How might the task force impact on these "big issues?"
- 3) a single page "data sheet" on the congregation, including:
 - the demographic breakdown of its membership;
 - a list of the educational programs, and the number of participants in each;
 - size and description of the educational staff;

If the congregation has engaged in a process of long range planning at some point in the past five years, it would be helpful if summary documents pertaining to this planning process could be included.

This written expression of interest should be sent to Isa Aron, at the RHSOE, by February 15, 1994.

Widening the Conversation

- In subsequent weeks, the initial group should cast its net more widely, involving other members of the congregation's leadership, in conversations similar to the one it has begun.
- Concurrently, the congregation should begin to think about potential members of the task force, especially the Chair and the Coordinator.

Site Visit

In February or March, 1994, either Isa Aron, the ECE Director, or Sara Lee, the Director of the RHSOE, will visit the congregation for approximately two days. This visit will serve as an opportunity for the congregation to learn more about the ECE, and for the ECE to learn more about the congregation. Arrangements should be made for the ECE representative to meet with diverse groups, such as the Board, the professional staff, and appropriate committees. These meetings will afford an opportunity to discuss some of the larger issues which will be raised in the course of the process, and to consider which congregants should be invited to join the task force. If possible, meetings should be arranged with some of these individuals.

When and how will the formal decision regarding the congregation's participation in the ECE be made?

The decision regarding participation in the ECE will be a joint decision between the congregation and the ECE, to be made in the Spring of 1994, after the site visit has taken place. If the congregation finds itself in agreement with the goals of the ECE, and able to meet the conditions outlined on pp. 6 - 7 of this document, a letter of agreement, outlining the mutual obligations of the ECE and the congregation, will be drafted. We recommend that participation in the ECE and the establishment of the task force be voted upon by the synagogue Board, and that the Board require the task force to report on its activities at regular intervals.

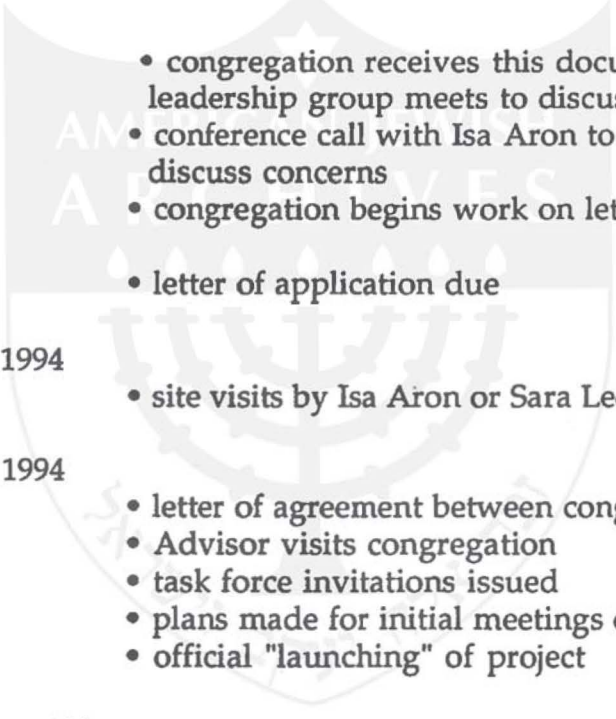
We hope to have all ECE participants on board by May, 1994.

When will the project officially begin?

By the time the agreement is reached, the initial phases of the experiment will have been well underway. At this point the Advisor will visit the congregation for the first time, to discuss:

- the composition of the task force;
- plans for the first few meetings of the task force.
- plans for the official "launching" of the project, through sermons, panel discussions, focus groups, articles in the Temple bulletin, etc.

Tentative Timeline



January, 1994	<ul style="list-style-type: none">• congregation receives this document; small leadership group meets to discuss reactions• conference call with Isa Aron to ask questions and discuss concerns• congregation begins work on letter of application
February 15, 1994	<ul style="list-style-type: none">• letter of application due
February/March, 1994	<ul style="list-style-type: none">• site visits by Isa Aron or Sara Lee
April/May/June, 1994	<ul style="list-style-type: none">• letter of agreement between congregation and ECE• Advisor visits congregation• task force invitations issued• plans made for initial meetings of task force• official "launching" of project
October/November, 1994	<ul style="list-style-type: none">• first workshop for leadership teams from all congregations (location to be announced)
May, 1995	<ul style="list-style-type: none">• second workshop for leadership teams from all congregations
March, 1996	<ul style="list-style-type: none">• third workshop for leadership teams from all congregations



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RHEA HIRSCH SCHOOL OF EDUCATION

November 5, 1993

Professor Adam Gamoran
Wisconsin Center for Education Research
1025 W. Johnson Street
Madison, WI 53706

Dear Adam:

This letter is a follow-up to our phone conversation of several weeks ago, regarding the possible assignment of Roberta Goodman as "research team leader" for HUC's Experiment in Congregational Education (ECE). Since our initial conversation, I've discussed the matter at length with Alan Hoffman, and have had a brief E-Mail exchange with Barry Holtz. In this letter, I will try to state the case for the CIJE's assigning Roberta to our project for a total of 20 days, spread out over 1994.

Our Proposal

We propose that during 1994 Roberta be assigned, as part of her CIJE responsibilities, to be a research team leader for the ECE. This would involve working with the volunteer research team at Congregation Sinai in Milwaukee, as they study and reflect upon their efforts at restructuring the educational programs of their congregation. Roberta would facilitate and supervise the work of this research team, and write summaries of their findings; this task would involve a total of 20 working days, spread out over the course of the year. If you wish, we could pay a proportion of Roberta's annual salary. After the first year, assuming that Roberta would have completed her doctoral dissertation, she would continue to work on this project as a paid consultant, in addition to her CIJE job, for two additional years. Although the CIJE would no longer be paying her salary, her work on the ECE could still be considered an integral part of CIJE's monitoring, evaluation and feedback effort.

What's in it for Roberta

Roberta has expressed great interest in participating in this project, since it joins together two of her deepest interests: *congregational change and action research*. As much as she would like to participate, however, Roberta has made it clear that her highest priority (appropriately, we all agree) must be the completion of her doctoral dissertation by December of 1994. Thus, Roberta's participation in the first year of the ECE is contingent on this work being considered as part of her CIJE assignment.

Professor Adam Gamoran
page two
November 5, 1993

What's in it for the CIJE

While it would be presumptuous of me to tell you how to structure the monitoring, evaluation and feedback project, my conversations with you and Alan made it clear that the CIJE has yet to reach a principled decision on the extent to which the field researchers will monitor specific projects in each lead community. So, in a way, this decision will be precedent setting. While it might seem a difficult precedent to set, there are, I believe, some good reasons for the CIJE to enter into this partnership with the ECE:

- a) Both the CIJE and the ECE are funded by the same donor. I believe that Mr. Mandel would be pleased to know that two of his grantees are pooling their resources in service of an improved product.
- b) Both the CIJE and the ECE stand to gain from this form of cooperation. The ECE is the type of project that may be of interest to a number of congregations in the lead communities. In return for "lending" us a researcher, the CIJE could certainly expect to have access to the data generated by the project. Alan and I discussed the possibility that the CIJE might wish to convene certain meetings in which participants in the ECE would speak of their work. Likewise, it might be possible to arrange for professional and lay leaders in the lead communities to attend the ECE annual gathering, and for CIJE staff to participate in ECE workshops (this, in fact, has already happened, with Barry attending our conference in May, and both Barry and Gail having been invited to a November 21 planning meeting).

From HUC's perspective, it is equally important for us to enter into a partnership with the CIJE, because it will create a synergy with more broad-based efforts and inform a broader audience of our work.

But over and above these instrumental benefits, there is a more principled reason, I believe, for us to try to work this out. The turf wars in Jewish organizational life are legendary. Given that so many of us have personal ties with one another, wouldn't it be a fine statement to have our organizations become partners?

I realize, of course, that our proposal poses certain problems for you: 20 days spent on the ECE are 20 days that Roberta would not be devoting to another, perhaps equally compelling project. If you have any further questions about my proposal, or suggestions of further comprises or "deals" that might be struck to make this work for all of us, please let me know. I know that your team will be meeting on November 14. As I may have told you, I will be out of the country from the 7th to the 15th. If you need to talk to someone at our end, Sara Lee can be reached through Faye Anderson, our departmental secretary. Sara is fully apprised of the situation and has discussed it with Alan.

Professor Adam Gamoran
page three
November 5, 1993

For your information, I am enclosing a fairly detailed description of the ECE, which outlines more fully the role of the research team leader. I look forward to hearing from you after your meeting.

B'shalom,



Isa Aron, Ph.D.
Professor of Jewish Education

c: Alan Hoffman



The Experiment in Congregational Education
Description and Protocol
Tishrei, 5754

What is the Experiment in Congregational Education?

The Experiment in Congregational Education (ECE) is a project undertaken by HUC - JIR's Rhea Hirsch School of Education (RHSEO) in cooperation with the UAHC Commission on Jewish Education. The ECE will bring together a small number of Reform congregations (between four and six) to re-think and re-structure the *full* range of their educational programs, as they affect *all* age groups. Its ultimate goal is to widen the definition of education in the congregational setting, and to assist congregations in their efforts to transform themselves into learning communities.

On what assumptions is the ECE based?

Underlying the project are a number of beliefs which derive from our understanding of both the needs of Reform institutions and the realities of institutional change. These assumptions are hinted at in the project's name -- the *Experiment in Congregational Education*.

Education, in our view, involves much more than schooling. It is the full range of activities through which a culture or heritage is transmitted. Education employs both formal and informal modalities, and involves people of all ages. A key ideological principle of the Reform Movement is that of "informed choice." Underlying the ECE is a belief that being informed is much more than simply absorbing information -- it requires spiritual and emotional, as well as intellectual engagement with the subject at hand.

The *congregation* is the primary Jewish community for most American Jews. Its mission is to create opportunities for its members to participate more fully in *Torah* (learning), *Avodah* (worship), *u'G'milut Hasadim* (acts of kindness and justice), the three pillars of the Jewish Tradition. For the congregation, the study of *Torah* (interpreted broadly) is both an end in itself and a means of sustaining community.

Every aspect of the congregation's life, from services and sermons to fundraising and management, is a potential arena for Jewish education. Thus the work of re-thinking and re-designing *congregational education* demands the attention of the entire leadership, as well as the full spectrum of the congregation's membership.

Finally, the ECE is an *experiment* in congregational education. We chose to characterize it as an experiment for a number of reasons:

First, this attempt at self conscious re-conceptualization of education in Reform congregations represents a departure from previous efforts. In choosing to participate in this project congregations are entering uncharted territory; neither the process nor its results can be fully predicted ahead of time. Among the consultants to the ECE are nationally known experts in organizational and educational change, as well as congregational leaders who are engaged in similar attempts at re-configuration. Even so, the ECE's approach to reforming congregational education is, as yet, untested.

There is a second reason, as well, that the term *experiment* was chosen, and that relates to the critical role of research in this project. Too often in Jewish life, changes are initiated without any provisions being made for documentation. Thus, whatever the project's outcomes, outside observers (and even the key actors themselves) are no closer to an understanding of the change process or the determinants of success than they were before. The ECE has been designed to assure that what transpires in the participating congregations (both process and outcomes) will be studied, and that the insights gained from these experiences will be available to congregations which attempt similar reforms in the future.

But while research is central to the ECE, the kind of research to be conducted is different from more conventional social science research, in which outside observers collect and analyze the data. Congregations which join the ECE will engage in *participatory action research*, in which the professionals and members of the congregation will serve as the primary researchers. Proponents of participatory action research, which is relatively new (though increasingly popular) in the field of education, claim that it has three important advantages over more conventional research: First, by conducting research themselves, those involved in the change process are provided an opportunity to reflect critically on their activities; this reflection leads to greater self-awareness and receptivity to change. Second, participatory action research provides a continual feedback loop; this process of *formative* (rather than *summative*) evaluation means that participants don't have to wait until the conclusion of the project to catch their mistakes, but can provide corrections mid-course. Finally, the knowledge generated through participatory action research is more useful to practitioners than the knowledge obtained by more conventional research. Since the research questions and issues are generated by participants themselves, the findings are less academic and more relevant to their practical concerns.

Three additional assumptions of the ECE, while not implied by its name, are equally important:

Education in the congregational setting calls for changes that are broad and systemic. Congregations have tended to view education as synonymous with schooling; and past efforts to improve the congregational school have tended to be additive and incremental, taking the existent structures as given, and instituting new curricula, teacher training, or (most recently) family education. The ECE is based on the assumption that these limited changes have led, at best, to limited outcomes. The challenges facing Reform Jewry call for changes that are more dramatic and far-reaching -- in a word, *transformational*.

Transformational change can only occur when an institution's key stakeholders are prepared to explore and challenge one another's core values and assumptions. This process is arduous and risky, bringing to the surface conflicts and contradictions that may have heretofore been glossed over. Its rewards, however, are many: for individual participants, new insight and deeper understandings; for the institution as a whole, a heightened sense of community and a renewed sense of purpose.

The discussion of the core values and assumptions of congregational education must be set in a Jewish context. Jewish texts, Jewish concepts and Jewish activities must serve as points of reference throughout. The process of exploration itself must be a form of *talmud torah*; participants must never lose sight of the fact that they are engaged in a holy task.

What are the ECE's goals for its first three years?

While each participating congregation will set its own specific goals, we expect that participating congregations will accomplish the following:

- evolve a collective vision of the congregation as a *kehilla kedosha*, a holy community, and of the place of Jewish learning within that community.
- arrive at consensus on what it means to be an educated, committed and practicing Reform Jew within that *kehilla*.
- agree on a long-term plan for re-structuring the congregation's educational programs, in order to help all its members become educated Jews;
- implement a number of more immediate changes that will move the congregation towards its long-term goals;

- develop a communication mechanism whereby members of the congregation can be informed of and participate in the shaping of the vision and the long-range plan.
- create a written record of both the issues that have been explored, and the processes through which this exploration has taken place.

What will congregations participating in the ECE do? What activities will the project entail?

While the specific issues facing the participating congregations will vary according to their particular circumstances and needs, a common pattern will guide their activities:

Convening a Task Force

Each congregation will convene an educational task force, whose purpose is three-fold:

- a) to serve as the catalyst and focal point for a myriad of conversations aimed at articulating a vision of Jewish life and Jewish education;
Some of the issues particularly salient for members of the task force might be:

- What are the key elements of being a literate Jew? Are knowledge of Hebrew and a facility with traditional texts criteria for Jewish literacy?
- What constitutes a Jewish role model? To what extent are those who serve in a teaching capacity role models for their students?
- Should a certain level of achievement and participation, rather than hours spent in a classroom, be prerequisites for becoming a Bar or Bat Mitzvah?

To initiate and sustain these conversations the task force might employ parlor meetings, speakers, sermons, articles in the bulletin, and so on.

- b) to inquire into every aspect of the current educational program; to assess its strengths and limitations as measured against their vision; to investigate alternative institutional arrangements and educational modalities; and to derive from this inquiry a plan for restructuring. The full plan may take 2 or 3 years to formulate, and as long as 5 - 7 years to implement (although parts of the plan will be amenable to implementation much sooner, as discussed below). At every step the task force should involve as many members as possible in its deliberations, and utilize a variety of mechanisms to keep members informed of its decisions.
- c) to institute a series of smaller, more immediate innovations that will be steps towards the ultimate goal; to use these changes as testing grounds for their ideas. For example, the congregation might:
 - broaden its conception of "teacher," and recruit a larger number of individuals to serve the congregation in some educative capacity;
 - create new mechanisms for trans-generational education;

- give educational themes more visibility in its public events.

The task force should represent a broad range of stakeholders in the congregation, including: the rabbi(s) and other senior professional staff, teachers and other staff members, lay leadership such as the chairs of the Board and the education committee, and congregants ranging in age as well as level of involvement in synagogue life. The task force should meet 6 - 8 times a year, attempting (wherever possible) to meet for extended periods of time in surroundings which are conducive to dialogue and reflection.

A respected lay leader should serve as Chair of the task force. Working closely with the Chair will be a Coordinator, who will oversee the work of various subcommittees, gather the requisite information and resource materials, maintain constant communication with members of both the task force and the congregation at large, and perform other functions aimed at facilitating the task force's work. We project that the Coordinator may require as much as a day a week to fulfill these responsibilities. Each congregation will have to decide whether the Coordinator ought to be a professional already working at the synagogue (who would be relieved of other responsibilities), or a lay person (with experience in group facilitation, experience in Jewish educational settings, and a strong Judaic background). In addition, the congregation may wish to engage a process consultant.

Assembling a Research Team

In addition to the task force, each congregation will recruit a research team, composed of 4 - 6 individuals, some of whom should also be members of the task force. Functions of the research team will include:

- collecting baseline data on current educational programs;
- studying the various subcommunities within the synagogue, their needs, interests and patterns of interaction with other subcommunities;
- keeping an anecdotal record of the work of the task force;
- collecting data on the tangible outcomes of restructuring;

Coordinating and guiding the work of the research team will be a Research Team Leader (RTL), who will be hired and paid by the ECE. The RTL, who may not live in the same city as the congregation, will receive documents regularly, maintain phone contact, and meet with research teams at each site three times during the year (travel costs will be paid by the ECE). The RTL will also work closely with the task force Chair and Coordinator, so that the task force will have an opportunity to request the collection of pertinent data, as well as timely access to the findings of the research team.

Collaborating with Other Congregations

-- Participating congregations will be paired with one another for "critical friends' visits," opportunities for members of the task force to visit one another's sites and discuss common concerns. Each congregation will be

- visited at least once during the three years of the project; and leadership teams from each congregation will participate in at least two visits.
- Participating congregations will have other opportunities to share resources and work collaboratively on specific issues, such as teacher recruitment and training, curriculum development, and family education. The ECE will have on its staff a "network manager," responsible for creating and sustaining networks among congregations. This person will also help the congregations find needed educational resources.
 - The ECE will sponsor an annual event for all participating congregations. At this event common concerns will be discussed, and cases written by the research teams analyzed.

What kinds of congregations is the ECE looking for?

From the perspective of the RHSEO, the primary criterion for a congregation's participation in the ECE is its commitment to deliberate for an extended period of time on a number of key issues: its ideal for itself as a *kehilla* (community); the role of education within the *kehilla*; and the fit between its current educational programs and this ideal.

Congregations who join the ECE must share the view that education is the purview of the entire synagogue, rather than just the school. Top lay and professional leaders must become actively involved in the task force process, and be able to sustain their commitment for a period of five to seven years. In addition, a wide range of members must be represented in the task force.

A third characteristic of participating congregations must be their willingness to take a number of risks: to re-think and revise some of their assumptions; to explore alternative institutional arrangements; and to allow their deliberations to be written up and shared publicly as part of the research.

Finally, a participating congregation must be able to recruit a number of individuals who have expertise in one or another of the research tasks this project will require. To become a participant in the ECE, a congregation must entice a number of these talented people to take on limited research assignments.

What will the congregation receive from the ECE?

- assistance in structuring its deliberations regarding Jewish life and Jewish education;
- assistance in strategic planning;
- specific expertise in areas of Jewish education, such as curriculum and staff development;

- expertise in group process;
- a semi-annual workshop for leadership teams;
- opportunities to network with, visit, and be visited by other congregations undertaking similar efforts;
- a Research Team Leader (RTL), who will visit the site 3 times a year, to work with the task force and the research team;
- travel grants to partially offset the costs of attending "critical friends' meetings" and semi-annual events of the ECE (these will vary in amount depending upon the congregation's location and resources);
- assistance in raising funds from local and national foundations, to cover the cost of hiring the Coordinator, sending teams to ECE events, and other task force expenses.

What commitments must a congregation make to the ECE?

- to convene a high profile task force in which the various constituents of the congregation are represented.
- to bring on board a task force Coordinator, who will be able to devote approximately one day a week to the project. This person might be a professional (relieved of other responsibilities to accommodate this task) or a lay leader with expertise in education, organizational development or planning.
- to recruit a research team of 4 - 6 members who will work to document the planning process through observation and interviews.
- to assume the travel costs:
 - for a team of at least two to travel to the semi-annual workshops;
 - for a team of three or more to travel to other ECE congregations for "critical friends" visits twice during the three year period.

The ECE has a limited fund for defraying a portion of these costs, and will assist the congregation in raising funds from outside agencies.
- to host one "critical friends" visit during the three years of the project.

How should a congregation decide whether or not to join the ECE?

The decision to join the ECE should be made through a series of explorations and conversations with an ever-widening circle of participants, according to the following schedule:

Initial Conversations

- At least four key leaders should be involved in the initial conversation: the senior rabbi, the educator, the congregation president, and a lay leader with educational responsibilities. This group might begin by reading this

document very carefully, noting areas of agreement and disagreement, questions and concerns.

- After this group has had a chance to discuss the document, a conference call should be arranged with Dr. Isa Aron, Director of the ECE. During this conversation, questions will be answered and specific issues discussed.

Expression of Interest

If the group finds itself in agreement with the major premises of this document, and feels that it can meet the expectations delineated above, it should designate one or more of its members to summarize the main points of their conversations in a written "expression of interest," comprised of the following:

- 1) a cover letter, indicating the congregation's interest in joining the ECE, and its ability to:
 - convene a high level task force;
 - engage a Coordinator for a period of two and a half years;
 - recruit a research team;
 - allocate funds for travel over a period of two and a half years.This letter should be signed by the congregation's president and senior rabbi.
- 2) a short essay (1-2 pages) addressing the following questions:
 - Why is the congregation interested in joining the ECE?
 - What are the leadership's current thoughts about the nature of the synagogue community, and to the role of Jewish education within that community?
 - How would participation in the ECE fit with the congregation's other spheres of activity and special foci?
 - With what "big issues" is the congregation grappling at the present moment? How might these issues impact on the work of the task force? How might the task force impact on these "big issues?"
- 3) a single page "data sheet" on the congregation, including:
 - the demographic breakdown of its membership;
 - a list of the educational programs, and the number of participants in each;
 - size and description of the educational staff;

If the congregation has engaged in a process of long range planning at some point in the past five years, it would be helpful if summary documents pertaining to this planning process could be included.

This written expression of interest should be sent to Isa Aron, at the RHSOE, by November 15, 1993.

Widening the Conversation

- In subsequent weeks, the initial group should cast its net more widely, involving other members of the congregation, drawn from different constituent groups, in conversations similar to the one it has begun. This might be done by means of parlor meetings, sermons, articles in the Bulletin, or other mechanisms. The ECE staff is currently working to gather and produce materials which will serve as appropriate conversation starters.
- Concurrently, the congregation should begin to think about potential members of the task force and research team, and, especially, the Chair and Coordinator of the task force. ECE staff members and consultants have thought a great deal about the composition of both groups, and would like to assist the congregation in recruiting appropriate individuals.

Site Visit by a Research Team Leader

In January or February, 1994, a Research Team Leader designated by the ECE will visit the congregation for two or three days. This visit will serve as an opportunity for the congregation to learn more about the ECE, and for the ECE to learn more about the congregation. Arrangements should be made for the Research Team Leader to meet with diverse groups, such as the Board, the professional staff, and, ideally, a range of congregants. These meetings will afford an opportunity to discuss some of the larger issues which will be raised in the course of the process, and to consider which congregants should be invited to join either the task force or the research team. If possible, the Research Team Leader should have an opportunity to meet with some of these individuals.

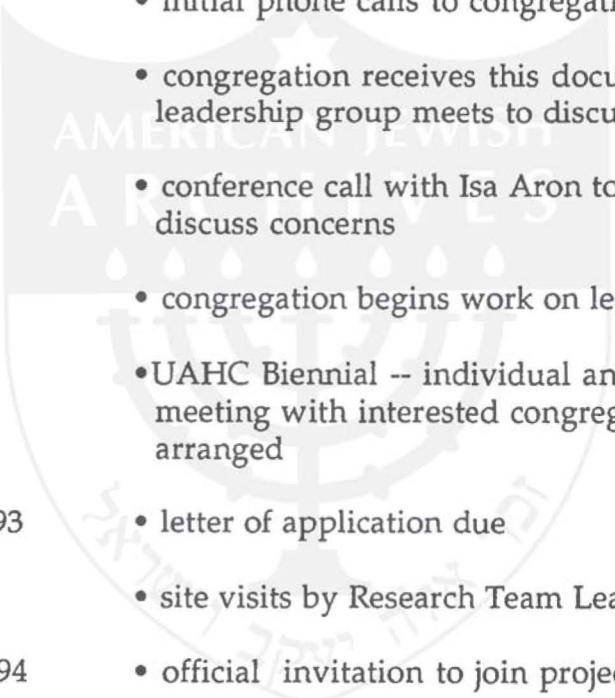
When and how will the formal decision regarding the congregation's participation in the ECE be made?

The decision regarding participation in the ECE will be a joint decision between the congregation and the RHSEO, to be made in the winter of 1994, after the site visit has taken place. If the congregation finds itself in agreement with the goals of the ECE, and able to meet the conditions outlined on pp. 6 & 7 of this document, a letter of agreement, outlining the mutual obligations of the ECE and the congregation, will be drafted. We recommend that participation in the ECE and the establishment of the task force be voted upon by the synagogue Board, and that the Board require the task force to report on its activities at regular intervals.

When will the project officially begin?

By the time the agreement is reached, the initial phases of the experiment will have been well underway. We hope to have all ECE participants on board by the end of February. The official "launching" of the project will be a workshop for team leaders from all ECE congregations, to be held in the spring of 1994 at a location to be announced.

Tentative Timeline



October, 1993	<ul style="list-style-type: none">• initial phone calls to congregations• congregation receives this document; small leadership group meets to discuss reactions• conference call with Isa Aron to ask questions and discuss concerns• congregation begins work on letter of application
Oct. 21-22	<ul style="list-style-type: none">• UAHC Biennial -- individual and/or group meeting with interested congregations can be arranged
November 15, 1993	<ul style="list-style-type: none">• letter of application due
Jan. & Feb., 1994	<ul style="list-style-type: none">• site visits by Research Team Leaders
Feb. or March, 1994	<ul style="list-style-type: none">• official invitation to join project
Spring, 1994	<ul style="list-style-type: none">• first workshop for leadership teams of participating congregations