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Lay Leadership Research Consultations, 1997-1998.

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MEMO

To: Karen, Cippi, Gail, Ellen, Dan
From: Nessa
Subject: Lay leadership: Background
Date: October 29, 1997

Attached are the notes from my September meeting with Lee Hendler, which I thought would interest you as we think about the Forum and JEWEL.



Meeting with Lee Hendler: 9/16/97

Nessa Rapoport

Some principles and observations about lay leadership development and education:

Whatever the audience--lay or professional--leadership education is about teaching and learning. The same laws apply: Thus, frontal teaching, "imparting facts," is not going to be as effective as engaging the learner and empowering him/her.

Lay leadership development must defy the current "class system," in which the more national the organization, the more prestigious the volunteer position is perceived to be. This model is empty; the real work is done locally, where you know the people and they know you--and you're accountable.

Lay leadership development for Jewish education is about creating a culture. Judaism is not the sole province of rabbis and professionals. Confident rabbis/professionals find the engagement of lay leaders a fulfillment of their vision, not a challenge to it. The text and its pertinence to the life and work of the lay leader need to be seamless, integrated.

Leadership is not about "being nice." It depends on the magic of chemistry, culture, energy and talent. Thus the job in lay leadership development is to identify individuals and develop them deliberately. It's not an "open house."

Money offers the power to influence people, and there's no way around that reality. It's not sufficient but it's necessary, because the power it confers is necessary to effect real change. We need to understand better how power works in the Jewish community. And we need models of women leaders with a range of styles and ways of doing things.

LH's generation: We need to understand how hurt they've been by Jewish life, their incredible vulnerability, and how many stumbling blocks have been put in their way. We should look for independent funders, like those at the Jewish Funders Network. They may feel disaffected, but they have also inherited money designated for Jewish sources. They have the resources, the competence, and the very high levels of secular education to be in a position to make a difference.

The quest for meaning, no matter how superficial its manifestations may appear, is real. We are the first generation to grow up on a truly secular diet, and it's not very sustaining. The leaders in their 60s and 70s--our parents--found the drama of saving Jews sufficient. The organizations that embodied that drama, like the federations, worked for them. We've inherited the idea that there must be Jews in the world--but why?

The generation of the 20s and 30s seems radically different. Not vacuous, as is often claimed, but marketing is in their bones. Their language is visual and quick, which makes the wordiness of Judaism a problem. They seem more cynical in some ways, but with a serious commitment to social action; they feel poverty, illiteracy, and the destruction of the environment keenly.

Criteria for Lay Leadership:

1. Power/resources. See above.

2. Talent.

3. A Range of Models.

4. Desire for Jewish knowledge and desire to lead out of that knowledge.

5. Experience. It counts: In the doing, in the trenches, putting in the hours is the way you learn. Trying to make something happen--running a program, serving on a board, running a business. There is no substitute for the seasoning that results from real time and effort, from making mistakes and learning from them. To bring in people who have never had experience is going to slow the learning curve.



Steven M. Cohen
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Re: Pooled data sets

October 5, 1997

Ms. Karen Barth
CIJE
15 East 26 Street
New York, N.Y. 10010

Dear Karen,

In the course of our conversation about ten days ago, you outlined the CIJE's interest in establishing Jewish community profiles that would draw, in part, upon already collected data sets. I suggested that many extant survey data sets collected during the last decade could be merged to provide reasonably adequate data for intermediate size Jewish communities and larger. This memorandum outlines the rationale, procedures, benefits, and limitations of such an endeavor.

The sorts of information commonly available in extant data sets that are of interest to you include the following:

Popular Holiday Observance: Passover Seder, Chanukah candle lighting, Yom Kippur fasting, High Holiday service attendance, and refraining from having a Christmas tree.

Ritual practice: Lighting Shabbat candles, using two sets of dishes for meat and dairy products, eating only kosher meat at home, not handling money on Shabbat (or some functionally equivalent restriction), attendance at Shabbat services.

Affiliation: membership in synagogues, JCCs, and other Jewish organizations; patterns of contributions to Jewish and other charities; reading Jewish periodicals.

Association: in-marriage; friendship with other Jews; Jewish density of neighborhood (zip code).

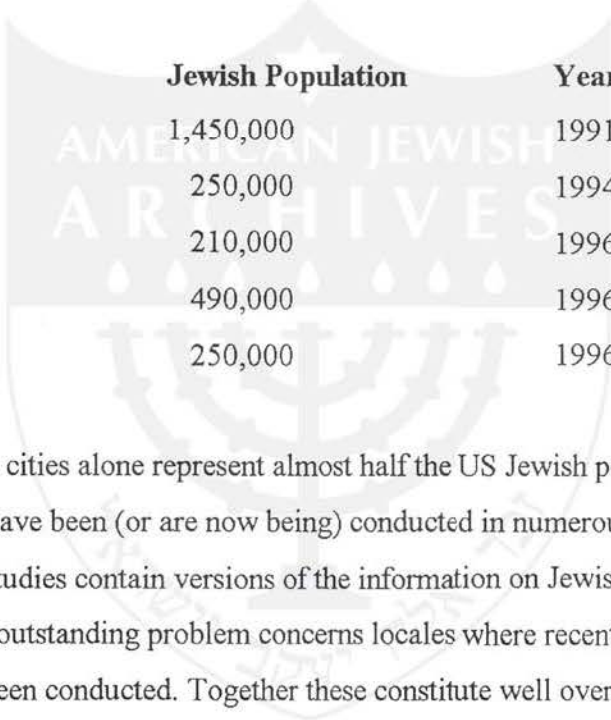
Jewish education, past and present, self and children: schooling (main form, years); Bar/Bat Mitzvah; youth group; camp (usually poorly measured); trips to Israel; Hillel participation; university Jewish studies; and adult Jewish education (sometimes).

(The division of Jewish identity items into four groups – holidays, rituals, affiliation, and association – derives from factor analyses of data I have explored; other researchers have uncovered similar patterns in their data.)

The objective of obtaining extant information on small or rare population groups (such as individual Jewish communities) is one that has been frequently addressed by social scientists over the years. When a defined population is too small to generate sufficient numbers of cases for reliable statistical estimates, researchers often turn to amalgamating or “pooling” data sets collected at several points of time containing identical or similar questions. American Jews, for example, constitute only about 2% of the national population. Obviously, they are too few in number to yield enough cases on any one standard survey ($N =$ approximately 1500). I refer you to an article to appear in the Fall 1997 issue of the *Public Opinion Quarterly*, in which Charles Liebman and I analyze 20 pooled data sets stretching from 1972 to 1994 to examine the nature and etiology of Jewish liberalism. I bring this example to substantiate my contention that pooling data is an effective analytic

technique, and one that is widely accepted in scholarly circles (POQ is the leading journal in its field, one noted for its methodological rigor).

For the purposes of constructing community profiles, we would rely primarily upon recently conducted Jewish community studies, of which there are many. In fact, since 1991, most of the American Jewish population has been covered by local Jewish population studies, of which five appear below:



City	Jewish Population	Year (Approximate)
New York	1,450,000	1991
Chicago	250,000	1994
Boston	210,000	1996
Los Angeles	490,000	1996
Philadelphia	250,000	1996

These five cities alone represent almost half the US Jewish population, and, to reiterate, studies have been (or are now being) conducted in numerous other locales. Generally, these studies contain versions of the information on Jewish identity and education noted above. The outstanding problem concerns locales where recent Jewish population studies have not been conducted. Together these constitute well over a third of the American Jewish population.

To establish community profiles in these areas, I suggest pooling several extant data sets. For the communities which have not recently conducted surveys, this procedure would result in data not at all heretofore available. The procedure even promises some benefit for the larger communities which could be arrayed against common, nationwide measures of Jewish identity and Jewish education. (The larger communities' studies could be used to assess and refine the estimates derived from the pooled data sets.)

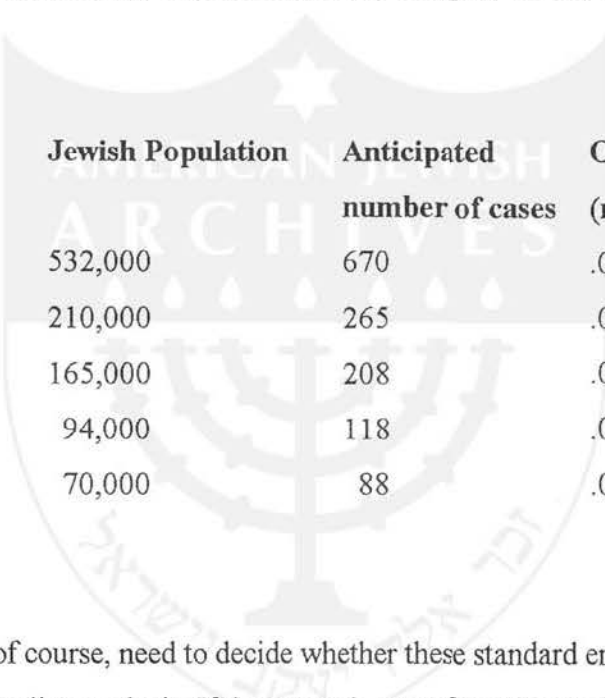
The data sets that I know of that would be most useful in such an endeavor, consist of the 1990 National Jewish Population Study, as well as several national surveys of American Jews I have conducted with the help of Market Facts, Inc., a leading survey research corporation. This company maintains a "Consumer Mail Panel" (CMP) of over 250,000 Americans who agree to respond to surveys. Of these about 10,000 include a Jewish head of household, that is, someone whose religion is identified as Jewish (thus, excluding the small number of Jews who identify as ethnically Jewish but who would answer, "none" or "other" when asked for their religious affiliation). Between 1988 and 1997, I have conducted four nationwide, mail-back surveys using the CMP, drawing demographically balanced samples from the 10,000 or so Jewish households. Each time I found the samples highly resembled the vast majority of Jews in the 1990 NJPS who are "Jews by religion" (identify their religion as Jewish) or who are "Jews by choice" (converts to Judaism). The following table summarizes the relevant information on the studies. ("NSAJ" refers to "National Survey of American Jews," the studies I conducted with the Market Facts Consumer Mail Panel.)

Survey	Year	N	Sponsor
NSAJ	1997	1004	Jewish Community Center Assoc'n
NSAJ	1993	1464	Joint Fund for Jewish/Zionist Ed
NSAJ	1991	1151	American Jewish Committee
NJPS	1990	2441	Council of Jewish Federations
NSAJ	1988	1252	American Jewish Committee

The total number of cases available from these five studies amounts to 7,312. In addition, scattered pieces of evidence can be gathered from other national surveys. For example, from 1993 to 1997, the American Jewish Committee has conducted annual nationwide telephone surveys using the Market Facts Consumer Mail Panel. Each study encompassed over 1,000 respondents. Although these studies ask far fewer questions than the mail-back studies, they do contain some key variables. Among these are: synagogue affiliation, denominational identification, and intermarriage. Taken together, these three

variables, when crosstabulated can create a typology that can fruitfully predict other indicators and can only augment our understanding of particular communities.

Even if we exclude the recent American Jewish Committee studies and assume no other studies can be uncovered, we can still count on a pooled data set of over 7,000 cases. The anticipated number of cases for selected communities (assuming a national Jewish population of 5.8 million) appear below. In addition, the table presents the calculation of one standard error for dichotomous variables with a 50-50 split, that is, where sampling error would be largest.



City (metropolitan areas)	Jewish Population	Anticipated number of cases	One standard error (maximum)
Miami area	532,000	670	.019
San Francisco	210,000	265	.030
Wash., DC area	165,000	208	.035
Detroit	94,000	118	.046
San Diego	70,000	88	.054

You will, of course, need to decide whether these standard errors imply sufficient precision for your policy analysis. If they are adequate for your needs, then amalgamating and analyzing pooled extant data sets may provide a relatively low cost procedure for establishing Jewish community profiles.

An alternative, one which could stand alone or augment previously collected data, is to construct your own mail-back survey using the Market Facts CMP. You can oversample particular communities (those that have not recently conducted a Jewish population study), while still collecting data nationwide.

I hope and trust this memorandum addresses most of your initial questions regarding this procedure. Please do not hesitate to call or e-mail should you have any questions or wish any further information on this matter.

Sincerely yours,

Steven M. Cohen



Lay Leadership Research Consultation

October 5, 1997

Potential Invitees for the consultation:

* Steven M. Cohen steven@vms.huji.ac.il

Sam Heilman - Queens NY

Charles Kadushin -

Pearl Beck

Barry Kosmin - (England) Nessa

* Reynold Levy Nessa

Calvin Goldscheider (Brandeis Brown)

Susan Stadolsky prof.

Barbara Schneider prof.

Dele Pergale
Bethamie Horowitz

Charles Leibman

Jonathan Sarna - Brandeis

Gary Tobin - SF

Steve Bayme

Egon Mayer

Jack Wertheimer

Arnie Eisen - Stanford

Paul Rutterband

Riv Ellen Prell - anthropologist
Minn

Michael Paluy
Yitz Greenberg

Need phone numbers or e-mails for the above list and who could be the contact person

KAB's availability is Nov. 19. Nov. 24, Dec. 24 (Sundays?)

Idea for a script to use in speaking to potential consultation participants:

The CIJE is considering developing a serious piece of qualitative research on lay leadership to include philanthropy and volunteerism. We would like you to join a small group of experts to consult with us and share your expertise about what research has already been done and what research could be done in. We want to learn about what has already been done in the field of lay leadership research and to hear ideas from you for directions and possibilities to pursue. possible research designs

We are hoping you can assist us articulate and define what the research should look like.

Some of the questions we have been wondering about are:

- why lay people get involved
- why lay people don't get involved
- why lay people get uninvolved after a period of time of involvement
- what are the stumbling blocks to involvement
- what are the stories and paths lay leaders have taken to become leaders

This is just a preliminary list of questions.

ask - what would you like to do? what questions would you like to ask? lay

identify ideas

send this as e-mail to Gail, KAB, Nessa

Lay Leadership Research Consultation

October 5, 1997

Potential Invitees for the consultation:

✓ PCH-Steven M. Cohen steven@vms.huji.ac.il
PCH-Gary Tobin ✓ PCH-Susan Stodolsky

✓ BH-Sam Heilman ✓ BH-Charles Kadushin

KAB-Michael Paley
KAB-Lee Hendler KAB-Jack Wertheimer
KAB-Chuck Ratner

NR-Barry Kosmin ✓ NR-Reynold Levy
✓ NR-Jonathan Sarna ✓ NR-Bethamie Horowitz

✓ GZD-Barbara Schneider

Please forward PCH phone numbers, e-mails, addresses for the above list

Additional Possibilities:

Calvin Goldscheider	Dela Pergala	Arnie Eisen
Charles Leibman	Steve Bayme	Riv Ellen Prell
Pearl Beck	Egon Mayer	Paul Ritterband

Please contact the names listed above with your initials and use the ideas below as a guide. We are trying to find out the availability of a small group and will arrange the consultation based on the greatest number of people available on one of the following dates- **Nov. 19, Nov. 24, and Dec. 24**

Idea for a script to use in speaking to potential consultation participants:

CIJE is considering developing a serious piece of qualitative research on lay leadership to include philanthropy and volunteerism. We would like you to join a small group of experts to consult with us and share your expertise. We are interested in learning about what research (in the field of lay leadership) has already been done and ideas for future research designs related to lay leadership.

We are hoping you can assist us articulate and define potential research designs.

Some of the questions we have been wondering about are:

- why lay people get involved
- why lay people don't get involved
- why lay people get uninvolved after a period of time of involvement
- what are the stumbling blocks to involvement
- what are the stories and paths lay leaders have taken to become leaders

This is just a preliminary list of questions.

MEMO TO: Steven M. Cohen, Samuel Heilman, Charles Kadushin, Barry Kosmin, Reynold Levy, Jonathan D. Sarna, Susan Shevitz, Jack Wertheimer

CC: Gail Dorph, Adam Gamoran, Ellen Goldring, Nellie Harris, Cippi Harte, Nessa Rapoport, Susan Stodolsky

MEMO FROM: Karen A. Barth

DATE: November 26, 1997

Re: Lay Leadership Research Consultation

Thanks to each of you for agreeing to join us and offer your expert input at our research consultation on lay leadership in Jewish education. We hope that this project will illuminate the key issues that need further research. CIJE's 1998 work plan includes a number of projects that focus on Jewish educational leadership.

We hope this consultation will help us sharpen our thinking and direction in the area of lay leadership development. We are interested about what it would take to mobilize lay leaders to support Jewish education.

Some questions we are asking ourselves about this issue are stated below. At the consultation, we would like your input on these and any other questions and issues we should be examining.

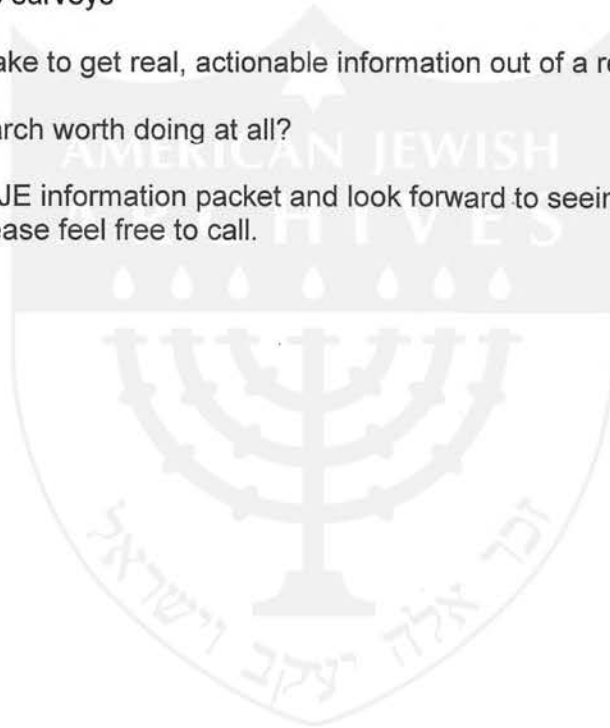
Research Questions

1. What would we like to know?
 - A. Why and how do lay people volunteer their time and money in support of Jewish education?
 - How do they get involved?
 - What keeps them involved?
 - What different roles do they play?
 - What obstacles/frustrations do they encounter?
 - B. What keeps people from getting involved?
 - Why do active lay leaders who are involved in other Jewish causes stay out of Jewish education?
 - Why do Jews who are active in non-Jewish philanthropy stay out of Jewish education?
 - What would it take to get them involved?

- C. Do the answers to A and B above differ by segment?
- Age
 - Number of generations that the family has lived in the US
 - Level of wealth
 - Jewish education
 - Family status
 - Gender
- D. Given trends in the American Jewish Community, how are the future lay leaders likely to differ from current/past lay leaders?
2. What would be appropriate research methodologies?
- A. What would be the most useful methods to investigate the above questions?
- Focus groups
 - Interviews
 - Quantitative surveys
 - Other
- B. What would it take to get real, actionable information out of a research project like this?
3. Is this kind of research worth doing at all?

We have included a CIJE information packet and look forward to seeing you on Dec. 24th. If you have any questions please feel free to call.

Enc.





MEMO TO: Steven M. Cohen, Samuel Heilman, Charles Kadushin, Barry Kosmin, Reynold Levy, Jonathan D. Sarna, Susan Shevitz, Jack Wertheimer

CC: Gail Dorph, Adam Gamoran, Ellen Goldring, Nellie Harris,
✓ Cippi Harte, Nessa Rapoport, Susan Stodolsky

MEMO FROM: Karen A. Barth

DATE: December 5, 1997

Re: Lay Leadership Research Consultation

Thanks to each of you for agreeing to join us and offer your expert input at our consultation on research about lay leadership in Jewish education.

Central to CIJE's philosophy and approach is the belief that through a partnership between lay leaders and professionals, meaningful progress can be made in advancing the quality of Jewish education in North America. Yet we and others have encountered significant challenges as we work to achieve this vision.

We hope this consultation will help us sharpen our thinking about lay leadership development.

Some questions we are asking ourselves about this issue are:

- A. Why and how do lay people volunteer their time and/or money in support of Jewish education?
 - How do they get involved?
 - What keeps them involved?
 - What different roles do they play?
 - What obstacles/frustrations do they encounter?
- B. What keeps other people from getting involved?
 - Why do active lay leaders who are involved in other Jewish causes stay out of Jewish education?
 - Why do Jews who are active in non-Jewish philanthropy stay out of Jewish education?
 - What would it take to get them involved?

Do the answers to A. and B. above differ by segment?

- Age
- Number of generations that the family has lived in the US
- Level of wealth/giving
- Jewish education
- Family status
- Gender
- Lay role
- Geographical location
- Institutional setting

Given trends in the American Jewish Community, how are future lay leaders likely to differ from current/past lay leaders?

The proposed agenda for the consultation is:

AGENDA

1. How could research help answer these questions? Are they the right questions?
2. How can we best tap into existing research in the Jewish and secular world on this subject? In what ways would using existing research be appropriate or not to the area of Jewish education?
3. What are some appropriate research methodologies?
 - a. What would be the most useful methods to investigate the above questions?
 - Focus groups
 - Interviews
 - Quantitative surveys
 - Other
 - b. Who would you survey and interview? How would you choose, etc.
 - c. What would it take to get information that has clear policy implications out of a research project like this?
4. Would a research project such as this be a useful step in an effort to push forward a community mobilization agenda?

We would appreciate any feedback on the agenda via e-mail to:
pcharte@compuserve.com.

We have included a CIJE information packet and look forward to seeing you on December 24th. If you have any questions, please feel free to call Cippi Harte at 212-532-2360 ext. 21.

Enc.

12/24/97

Lay Leadership Research Consultation: Summary of Issues Raised

Participants: Karen Barth, Gail Dorph, Adam Gamoran, Ellen Goldring, Nellie Harris, Cippi Harte, Charles Kadushin, Barry Kosmin, Reynold Levy, Nessa Rapoport, Susan Shevitz, Susan Stodolsky, Jack Wertheimer

Introduction:

Karen Barth began the consultation by introducing some of the challenges we are addressing, building the profession and community mobilization. There was an opportunity for all participants to introduce themselves. She then explained that we had invited participants to this consultation because we want to think more deeply about the issue of mobilizing lay leadership for Jewish education. Our purposes for the consultation include: clarifying the questions and issues and beginning to develop a research design to learn about lay leadership in Jewish education.

Part 1 Issues Discussed:

This part of the discussion focused on defining the problem. The conversation included the following:

What is the nature of the problem?

- Is there a shortage of quality lay leadership?
- At what level (national, regional local)?
- Are there institutions where the problem doesn't exist?
- How does Jewish educational lay leadership compare to volunteer leadership in other areas of Jewish life?
- What is the connection between the quality of lay leadership and issues of time and money?

Is there something fundamentally broken that needs to be fixed? (possible examples---)

- The way boards work-organizationally, structurally and within a contextual frame
- The expectations-demands of lay leaders both articulated and non-articulated
- The status and cache

Why do we want to mobilize lay leadership for Jewish education?

They bring the following kinds of resources

- Work

- Wisdom
- Financial assistance

Why do/don't people volunteer?

- Status, cache
- Identity
- Meaning
- Time availability
- Personal connections and expectations
- Need for knowledge

Part 2 Suggested Approaches to Learning more about these Issues:

Define issues of product/image. Are we talking about citizens, who own the enterprise or consumers who, are beneficiaries of the system and use it but are not invested in the same way as the citizen image.

Clarify terms. In an age of specialization and uniqueness (boutique) to talk about Jewish education as a mammoth venture is too broad and vague and needs to be sharpened and clarified.

Sharpen focus. Is there a lack of numbers, lack of quality, question as to whether Jewish education can make a difference, competing priorities.

Gather new data.

How are lay leaders recruited? What works and what doesn't in the way we recruit? What are the expectations of lay leaders? Roles and responsibilities? Are lay leaders valued? In what ways? What decision-making opportunities do lay leaders have? What are the institutional expectations of lay leaders?

Look at vibrant boards and boards that are in high demand as a way to understand the issues and motivation. Look at board members who are past the first generation of a board. Who are successful board builders, what are their characteristics? What can we learn from them? Facts: size of board, age of board members, level of giving of board. What would board practitioners like to know? Are there barriers to entry into leadership positions in Jewish education? What are they, how are they defined? Are there systems for overcoming these barriers?

One hypothesis generated in response to the nature of the problem was that there are heavy demands placed on members of Jewish boards versus other non-profit boards. We need to learn more about this. Planned Parenthood and the Red Cross are examples of national not-for-profit boards that deserve further investigation.

Part 3 Focusing on Sharpening the Questions to Direct the Research:

CIJE's goal is to develop an effective strategy to strengthen lay leadership in Jewish educational institutions and settings.

A multi-faceted matrix was suggested as a means of researching and dividing up the questions and issues for investigation. The dimensions include:

- people to talk to,
- movements/affiliation-orthodox and other streams of Judaism,
- institutions-day schools, synagogue schools, JCC's, camps
- levels of education-early childhood, school age, teens, adult
- Facts-size of board, level of giving, age of board

We discussed possible research methods, including interviews, observation, focus groups, and questionnaires.

Early information to gather includes:

- Who is the target audience-board chair or the school
- What does it take to ask people to participate and get involved?
- What is the relationship between volunteer capacities in Jewish education and other volunteer roles both in and out of the Jewish community?
- What is the relationship between synagogue lay leadership and federation lay leadership hierarchy (similarities and differences within each category and between the two)?
- Are unusual educational institutions marked by great leadership? Or, is great leadership a consequence of vibrant educational enterprises?

One of the ways we can focus the research is in terms of national, local and institutional data gathering.

Other information that might be gathered and tracked include:

- Track and follow Jewish money that is being given to secular institutions
- Talk to parents, community members, representatives from other Jewish organizations
- Track volunteer careers-in Jewish education, Jewish communal service, secular not-for-profit world

A book was recommended, *Why the Wealthy Give* by Francine Astrower as a suggestion for reading and learning more about those who give and why.

Lay Leadership Research Consultation Participants
December 24, 1997

Steven M. Cohen is Professor at the Melton Centre for Jewish Education, Hebrew University, Jerusalem.

Samuel Heilman is Harold Proshansky Professor of Jewish Studies and Sociology at Queens College, and is on faculty at the CUNY Graduate Center.

Charles Kadushin is Professor of Sociology and Psychology and the Coordinator of the Advanced Social Research Concentration at the CUNY Graduate Center.

Barry Kosmin is Director of Research at the Institute for Jewish Policy Research in London; faculty member of the Sociology Ph.D. Program at the CUNY Graduate Center; and Senior Associate at the Oxford Centre for Hebrew & Jewish Studies.

Reynold Levy is President of the International Rescue Committee.

Jonathan D. Sarna is Joseph H. and Belle R. Braun Professor of American Jewish History at Brandeis University.

Susan Shevitz is Director of the Hornstein Program in Jewish Communal Service at Brandeis University.

Jack Wertheimer is Provost of the Jewish Theological Seminary; the Joseph and Martha Mendelson Professor of American Jewish History at JTS; and the Director of the Joseph and Miriam Ratner Center for the Study of Conservative Judaism at JTS.

CIJE Consultants:

Adam Gamoran is Professor of Sociology and Educational Policy Studies at the University of Wisconsin.

Ellen Goldring is Professor of Educational Leadership and Associate Dean of the Peabody College of Education at Vanderbilt University.

Susan Stodolsky is Professor of Education and Psychology at the University of Chicago.

CIJE Staff:

Karen Barth, Executive Director

Gail Dorph, Senior Education Officer

Nellie Harris, Education Officer

Cippi Harte, Project Manager

Nessa Rapoport, Leadership Development Officer

MEMORANDUM
CIJE
15 East 26th Street, Suite 1817
New York City, New York 10010

TO: Consultation Participants

FROM: Karen A. Barth, Cippi Harte

DATE: February 1998

RE: CIJE Lay Leadership Research Consultation:
Summary of Issues Raised December 24, 1997

Participants: Karen Barth, Steven M. Cohen, Gail Dorph, Adam Gamoran, Ellen Goldring, Nellie Harris, Cippi Harte, Sam Heilman, Charles Kadushin, Barry Kosmin, Reynold Levy, Lisa Malik, Nessa Rapoport, Susan Shevitz, Susan Stodolsky, Jack Wertheimer

Introduction:

Karen Barth began the consultation by introducing some of the challenges we are addressing: building the profession and community mobilization. There was an opportunity for all participants to introduce themselves. She then explained that we had invited participants to this consultation because we want to think more deeply about the issue of mobilizing lay leadership for Jewish education. Our purposes for the consultation include:

- clarifying the questions and issues
- beginning to develop a research design to learn about lay leadership in Jewish education.

Part 1 Issues discussed:

This part of the discussion focused on defining the problem. The conversation included the following:

What is the nature of the problem?

- Is there a shortage of quality lay leadership?
- At what level--national, regional, local?
- Is there a lack of numbers, lack of quality?
- Can Jewish education make a difference?
- What are the competing priorities?
- Are there institutions where the problem doesn't exist?
- How does Jewish educational lay leadership compare to volunteer leadership in other areas of Jewish life?
- Are we looking for quality lay leadership or people willing to give time and money? What if these don't always overlap?

- Is there ambivalence about inviting lay leaders into the decision making process?

Is there something fundamentally broken that needs to be fixed? Possible examples:

- The way boards work – organizationally, structurally and within a contextual frame
- The expectations and/ or demands of lay leaders, both articulated and unarticulated
- The status and cache
- The mechanisms that link people to boards
- Lay “career tracks”

Why do we want to mobilize lay leadership for Jewish education?

- Is there a need for resources or for leadership or both? If so, what kind of leadership is needed?
- Is the involvement of lay leadership an end in itself, i.e. part of living Jewishly?
- How many people would it take to solve the problem? Of what type?

Why do/don't people volunteer?

- Status, cache
- Identity
- Meaning
- Time availability
- Personal connections and expectations
- Need for knowledge
- Emotional needs/barriers
- No one asked/the right person asked
- Contact with an inspiring professional leader

Also discussed was the question of whether we are talking about citizens who own the enterprise, or consumers who are beneficiaries of the system and use it but are not invested in the same way as the citizen image.

One hypothesis generated in response to the nature of the problem was that there are heavier demands placed on members of Jewish boards versus other non-profit boards. We need to learn more about this. Planned Parenthood and the Red Cross are examples of national not-for-profit boards that deserve further investigation.

Another strong hypothesis is that status issues get in the way of recruiting people to Jewish education, e.g. being on the board of Harvard versus being on the board of a local Jewish day school.

Part 2 Suggested approaches to learning more about these issues:

Focus and define the Study: In an age of specialization and uniqueness (boutique), to talk about Jewish education as a mammoth venture is too broad and vague and needs to be sharpened and clarified.

Gather new data:

One approach is to interview lay leaders to understand:

- How are lay leaders recruited?
- What works and what doesn't in the way we recruit?
- What are the expectations of lay leaders?
- What are the roles and responsibilities?
- Are lay leaders valued? In what ways?
- What decision-making opportunities do lay leaders have?
- What are the institutional expectations of lay leaders?
- Are there barriers to entry into leadership positions in Jewish education?
- What are these barriers?
- Are there systems for overcoming these barriers?

Another approach is to look at vibrant boards and boards that are in high demand as a way to understand the issues and motivating factors. Look at institutions that are past the first generation of a board and professional director. Who are successful board builders? What are their characteristics? What can we learn from them? Facts: size of board, age of board members, level of giving of board. What would board practitioners like to know?

A multi-faceted matrix was suggested as a means of selecting people to interview. The dimensions could include:

- Level of involvement or role (board chairs, foundations, non-involved)
- Movements/affiliation
- Institutions (day schools, synagogue schools, JCC's, camps) or age groups (early childhood, school age, teens, adult)

Another approach would be to gather data about boards – size of board, level of giving, age of board members.

We discussed possible research methods, including interviews, observation, focus groups, and questionnaires.

Part 3 Focusing on sharpening the questions to direct the research:

We discussed the goals of the research. CIJE's primary goal is to develop an effective strategy to strengthen lay leadership in Jewish educational institutions and settings.

Key questions could include:

- Who is the target audience – board chair or the school?
- What does it take to ask people to participate and get involved?

- What is the relationship between volunteer capacities in Jewish education and other volunteer roles both inside and outside the Jewish community?
- What is the relationship between synagogue lay leadership and federation lay leadership hierarchy (similarities and differences within each category and between the two)?
- Are unusual educational institutions marked by great lay leadership? Or is great lay leadership a consequence of vibrant educational enterprises?

One of the ways we can focus the research is to look only at national, local or institutional lay leaders or some combination.

Additional areas of focus might be:

- Investigate Jewish money that is being given to secular institutions.
- Talk to parents and community members, i.e. lay volunteers not in leadership positions.
- Talk to lay leaders from other Jewish organizations, i.e. outside of Jewish education
- Track volunteer careers in Jewish education, Jewish communal service, the secular not-for-profit world

A book, *Why the Wealthy Give* by Francine Astrower, was recommended. It illuminates some of the issues we discussed. Chuck Kadushin distributed an article from the October 1997 *American Sociological Review*, "Toward an Integrated Theory of Volunteer Work."

It will be important to look ahead and think about how the future will be different from the past.

revised

Lay Leadership Research Consultation

Date: December 24, 1998

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Jessica Holstein, secretary (JSH)

KAB: We don't know enough about the problem. People can be motivated to care about other issues, for example, Soviet Jews, saving the whales. Why is there no interest in Jewish education?

RL: What is the problem? Participation at what level: local, national, institutional? Are there not enough people involved? Would having 5000 extra people involved solve the problem?

KAB: There is a handful of people interested at the national level, and even that is mostly in the last ten years. In schools, it is mostly parents on the boards. Synagogues and synagogue schools have very weak leadership; they are not attracting highly talented lay leaders like those at United Way, Federations and universities.

GZD: It is a lack of numbers and a lack of quality. People do not believe that Jewish education can make a difference. We believe it can.

AG: Before we look at answers, we need to define the problem. CIJE has done a lot of work and made much progress in the area of Building the Profession. However, in the area of

community mobilization and lay leadership, we do not know very much about it. Lay leadership should see Jewish education as a top priority, but there are other competing priorities.

BK: Are members of the Jewish community citizens or consumers? For example, only parents are interested in schools, but as citizens, empty-nesters pay for (public school) education for young people, and people in Kansas pay for the Coast Guard. Jewish education may be too amorphous, and we are a compartmentalized society. Jewish education may be threatened in a world of increasingly polarized theology.

KAB: CIJE board and lay leaders across the US are not Jewishly educated; there is a problem of negative personal experience.

SC: Were they not educated, albeit unconventionally, by working in Jewish education, by working on budgets, and why is it necessary for lay leaders to be "Jewishly educated"?

RL: Before we discuss the causes of the problem, what is the problem? Is lay leadership development a means or an end? Are lay leaders a client?

SH: There must be a realization that Jewish education is a crucial to Jewish continuity.

CK: If they are interested, what do you do want them to do?

KAB: Lay leadership development is a means to an end. Mobilization leads to improvement of Jewish education. About two to four times more money is needed, plus we need leadership. Areas where lay leadership has taken control have seen real progress.

GZD: Maybe lay leadership development is both a means and an end.

LM: If lay leaders are not interested in Jewish education, then the end needs to be broadened from Jewish continuity to Jewish life. For example, people interested in Jewish education are not on Jewish federation boards.

CK: What about boards of Jewish education? Locally or nationally? What happened to these institutions? They are not mentioned in *A Time to Act*. Were they total failures?

SH: Who were the leaders of these boards? Maybe they more parochialized and became much more elite.

KAB: BJE's were neglected and failed to attract senior lay people. There was a time when Jewish education was not even on the agenda. Bureaus lost funding, and continuity commissions attracted funding and lay leaders.

NR: Jewish education is a means to a richer Jewish society in America, which in turn, makes a greater contribution to American culture. We need to have a big enough of a vision of the possibilities.

EG: Maybe we need to be asking others "What is the problem?" We look at it through our lens and maybe we are not right. We are not looking to create or recreate boards of Jewish education. We are looking to make Jewish education a priority for lay leaders. Why do people volunteer? One of the reasons is status.

SH: Getting on the agenda is a matter of status, for example, the New York Public Library. Education and learning, however, are small, local, and institutionally based.

SSh: We have an issue of separate systems: schools (day and synagogue) and federations. How do you pull together these two systems?

JW: A Protestant benefactor came to JTS for advice, saying that Jews have the answers. Are we really doing so badly and compared to whom?

SC: Are the best Jewish education institutions marked by the quality of their lay leaders? In Francine Astrower's book *Why the Wealthy Give*, she states that philanthropists are advancing their own visions and agendas of what society should look like.

LM: Lay leadership is an end – it is empowerment.

SH: It is both – leaders motivate and act as models.

BK: Do we have a definition of Jewish education? Does the system itself have a lack of clarity?

SH: Twersky's epigram is what Jewish education is.

RL: Is Jewish education more or less deprived than other areas, for example, Jewish arts? What are the size of boards? According to Astrower's book, doubling or tripling the size of boards leads to more money. What is progress and can that be researched? What are good, attractive models?

RL: Founding, charismatic professional leaders don't need strong lay leaders, for example, George Balanchine and Joseph Papp. But the second generation of leaders in an institution needs strong lay leaders.

EG: This is called institutionalization.

RL: There is the impression of a closed circle given to those outside Jewish institutions.

SH: People as they make it in America give to non-Jewish institutions as a symbol of having made it. We need to have a turn-around of attitude about being Jewish.

BK: We do have university chairs in Jewish studies programs.

SH: And we have Holocaust memorials.

BK: We have this assumption that lay leaders need to be "educated up," and this is threatening. Imagine saying that one needs to be ballet dancer in order to be on the board of a ballet company.

BK: Follow the dollars, for example, \$1 million to set up a Jewish studies chair.

RL: Fred Rose gave money to Jewish studies at Yale. This is money to Yale in his mind, not to Jewish education.

SC: According to Astrower's book, high prestige Jews are not involved in federations, for example. We are talking about creating a society of Jewish lay leaders who confer status upon one another.

SSh: Research might reveal painful things about how our community functions.

CK: We have two models: 1) go where the money is, and 2) look where "non-buyers" are. We want to buy their soul. How do we buy their soul and interest?

EG: People only have a certain amount of discretionary time, and there is a lot out there. Is that connected to "soul"?

CK: Jewish organizations are seen as greedy institutions.

KAB: There is a generational, life cycle issue why 40 to 55 years olds do not volunteer. They are sandwiched between aging parents and small children, and in two income households, people have less time.

EG: But people on boards have more money and consequently have more time, for example, women who do not have to work.

BK: Donors increasingly just want to give money and not be otherwise involved.

JW: The people involved in education are parents.

EG: If you compare to independent schools, they have prominent boards and donors.

RL: Constituencies of older (non-Jewish) institutions have been cultivated or have evolved.

JW: Are we trying to get givers of money or time?

SS: How do we mobilize different people to do different things?

KAB: How do we recruit people?

SH: They are self-selecting, not recruited.

JW: They have networks – people on boards talk to their peers and get them excited.

SSh: Let's look at models of lay governance. There are different kinds of alternative routes in. We have local, national and regional institutions with different dilemmas, and how do we create links among them?

SC: Lay leaders with entrepreneurial personalities are not interested in tedious board activities. CIJE's board, for example, is the kind of board which has tried to address that issue.

AG: How does the way Jewish education is structured and organized in formal and informal institutions facilitate or create barriers to lay leaders becoming involved, especially in supplementary schools which are run by organizations, i.e., synagogues, which are outside the federation system? There are issues of territory here. Synagogues have viewed BJE's as largely irrelevant.

SSh: Do federations really have the golden key? No. Federations themselves are deeply troubled. We have the entrepreneurial piece and the generational piece. But continuity commissions bring in money that would otherwise not be given to education.

AG: Continuity commissions don't have anything to do with educational institutions because they are in different systems/structures.

KAB: The federation is not a ruling or governing body; they are just player. Let's talk about methodology. Here is what we've been saying: We have to be clear about the outcome we are seeking. What do we want from lay leaders: time, money, or soul? Is there really a shortage of lay leaders? At what level does the problem exist? Are there places, institutions where the problems do not exist? Why does the problem exist: status, personal meaning, styles of work, i.e., entrepreneurial versus reality of operation of Jewish institutions? Is there something about how we use lay leaders? Or is it the structure of the system?

AG: There has been a lot of research done on the demography of volunteering, but has any research been done on how to motivate involvement? Are we correct in assuming that no such research exists?

RL: People need to be asked. How many people have been turned down when they have volunteered? How many people have been asked?

SH: What is the pool of potential volunteers? Do we need recruiters?

(JSH left the room briefly – notes interrupted.)

CK: What are the mechanisms that link structural to personal? We need a three pronged research approach.

BK: Careers of those involved could be tracked.

KAB: We could create a path to get from “farm team” to “major league” if we find out that this is the problem.

LM: In terms of the existing literature, there is a research handbook on non-profit organizations put out by Yale University Press edited by Wolf or Geiss with a section on lay leadership, and there is also the Journal of Volunteer Action.

SC: I would suggest four focus groups and ten in-depth interviews. There needs to be a relationship between data collection and data reflection and refraction with the involvement of an advisory group, i.e., us, to look at the preliminary data.

SS: The project needs to include successful, innovative contacts in research if we are interested in policy consequences. We need to know what is out there and what we are up against.

RL: Look at successful boards outside the Jewish community. What are the patterns of support and the patterns of protection. Who are the most admired sets of institutions, and who attracts people? For example, the Planned Parenthood national board is drawn from local boards – this is the “farm team” model.

SSh: Is there a community in the Jewish world which uses the Planned Parenthood model? You have competing spheres within communities: movements, denominations, and federations.

AG: We need a career analysis of Jewish lay leaders.

SC: The Detroit Jewish community is a model of a successful community.

SH: We need to consider the ideological factors of the Reform and Orthodox not being willing to serve together. We need to be sensitive to this as we move from local to national. Look at the proportions of the Orthodox in education, one-third, compared to the percentage of the Orthodox in the Jewish population, which is about seven percent.

BK: What is Jewish education? It is not scholarship and learning as much as it is socialization.

SH: What kind of Judaism do we want to continue?

BK: To avoid these issues, donors give to Yale. If we use focus groups and interviews, the research could raise some unpleasant issues.

SH: Not just pedagogical issues, but also cultural issues. What is the nature of continuity? What is the nature of plurality? What if we bring in these lay leaders and then the debate changes from how to raise money to what the curriculum should be, should classes be mixed cross-denominationally, male and female?

RL: If we bring in these people, they will have opinions.

KAB: If you have larger boards, no single person or opinion will dominate.

SH: The Orthodox, as a smaller constituency, will feel surrounded and will fight back.

SC: Orthodox institutions are more rabbinically run, and community support for education is much greater. Let's not put too much emphasis on increasing lay leadership in the Orthodox community. It is so different; it should be treated separately and seriously.

CK: This group (here) might not get entry into that world.

KAB: Not true. Torah Umesorah has asked for lay leadership advice from CIJE.

Summary research questions:

1. People who participate in successful boards
 - Participation in lay leadership in Jewish education, long term and more recent
 - Non-participants in Jewish education
 - Who recruits lay people for educational institutions
2. Orthodox and non-Orthodox – at least in the first round to see how different they are
3. Institutional – schools, JCCs, direct service education
 - Local – bureaus, continuity commissions, federations
 - Regional
 - National
 - Movements
 - Formal/informal

JW: What is national?

BK: Preschool, elementary, secondary, higher education, rabbinic education.

EG: Are we looking at people and following across, institutions and looking at people, successful and unsuccessful people or institutions?

SC: Who are the advocates?

KAB: National organizations are not real players.

JW: Are national organizations like Torah Umesorah or United Synagogue Department of Education really the clients?

SSh: What is the legitimate role of a lay leader? Do we have models from other non-profits or from Jewish philosophical traditions? This is going to be an ideological statement. Jewish education is in trouble because professionals are not in control of Jewish education.

LM: We need to do interviews and surveys, but direct observation of board meetings is the most important.

SC: We can't look at the entire US. We need to focus on non-orthodox day schools and well-functioning communities in the northeast and north-central US and draw conclusions about secondary and tertiary education from primary education.

KAB: We could interview fifty successful participants. Let's talk about research philosophy and trade-offs. These are emotional, value-laden issue we are trying to get at here.

SS: We must make a case early on that this is worth doing. We need to establish that a problem exists and that there is a connection between lay leadership and good Jewish education.

RL: For example, does the eighty percent of the problem exist in twenty percent of the population?

KAB: How do you research these issues?

SC: By looking at successful boards and the individuals who are key to running them.

BK: When you finish research, who do you want to read it?

KAB: The number one audience is CIJE itself, in order to develop strategy to motivate lay leadership.

BK: What are the resources in terms of funding? What is the time-frame: three months or three years?

CK: You should start small with three focus groups.

SH: And we must be prepared that what works in one setting may not work in another.

KAB: CIJE wants to develop a strategy, but we do not know what the problem is.

SH: How will this be presented? The audience will define the method of presentation.

RL: Let's get facts about boards: size, age, level of giving. We need to ask lay leaders and professionals what would be helpful to them with an eye on barriers to entry.

SC: A principle audience would be those recruiting lay leaders.

KAB: Is sharing this material with people the most useful way to use it?

EG: The facts may suggest a different strategy or a two-pronged approach. Does some of this information exist in archives?

BK: Ownership of the problem is linked to willingness to change.

