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Synagogue Change Research Project. Malik, Lisa, 1998.

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CONGREGATION RODEPH ALPAYIM: A CASE STUDY

PART I – BACKGROUND

Congregation Rodeph Alpayim (CRA) is a 400 family congregation in a suburb of a major city. It was created eight years ago by the merger of a Reform and Conservative congregation and many members still identify themselves strongly with one of those movements. Although the synagogue has chosen not to affiliate with any movement, the Reform prayer book is used on Friday night and the Conservative prayer book is used on Saturday morning and for the high holidays. The congregation is completely gender-egalitarian.

The members of the congregation are well-educated, middle to upper-middle class and concentrated in the thirty-five to fifty-five age group. Most members are married and have children, though there is a small group of singles in their twenties and thirties and a few older people. An unusual number of congregants have strong Jewish backgrounds. At least thirty have gone to day schools or Yeshivot as children.

Groups in the congregation

There are four distinct groups in the congregation:

1. **The Right wing** – Most are day school or Yeshivah graduates. They generally subscribe to the theology of Conservative Judaism but are only loosely observant of Jewish Law; they want the liturgy and style of services to be as close as possible to the traditional orthodox service of their childhood. At the first sign of anything “too” innovative, they head for the door (literally).
2. **The Left wing** – They are fans of the renewal movement (*Aleph/Pnei Or*) and frequently attend retreats and services run by renewal groups. They want services at CRA to be much more creative and participative. They have their own “havurah minyan” that meets once per month in people’s homes to do a creative prayer service. Past services have experimented with body movement, drumming, chanting and meditation
3. **The Reform classicists** – They grew up with Reform liturgy and view it as “traditional”. They are as attached to Reform liturgy as the right wing is to the orthodox liturgy.
4. **The Mainstreamers** – They are not attached to any particular liturgical style but are generally comfortable with the existing services at CRA. They are not opposed to change, but they are a bit wary of it.
5. **The 2-day-a-year attenders** – These are the members who come only on the high holidays. They like some of the melodies, but are bored by much of the liturgy which is in Hebrew.

| GROUP | SERVICE THEY ATTEND PRIMARILY | ATTITUDE TO CHANGE | PERCENT OF CONGREGATION | FREQUENCY OF ATTENDANCE |
|--------------------|--|---|--------------------------------------|----------------------------|
| Right Wing | Saturday AM + holidays | Very resistant to change away from traditional liturgy | 10%, but very vocal | Regular |
| Left Wing | Friday PM, Saturday AM + holidays | Very welcome | 10%, but very vocal | Often |
| Reform Classicists | Friday PM + high holidays | Somewhat resistant to change in liturgy – okay with new music | 8%, but many in leadership positions | Intermittent |
| Mainstreamers | Friday PM, Saturday AM + holidays | Open to gradual change, but wary | 22% | Intermittent, some regular |
| 2-Dayers | Rosh Hashanah + Yom Kippur, usually only part of the service | Mixed | 50% | |

Services

Roughly 35-50 people attend Friday night services. The service, which is co-led by the rabbi and cantor, follows the standard Friday night liturgy in the Reform movement's "Gates of Prayer." There is some congregational singing and a couple of cantorial solos. The cantor plays the clarinet before the service. As an outgrowth of Synagogue 2000 (low hanging fruit), the cantor has added a *niggun* (wordless song) at the beginning of the service, which is very popular with the congregation.

Saturday morning services typically have 100-150 people and up to 300 when there is a Bar/Bat Mitzvah. There is a policy that two shabbatot per month are reserved for services with no Bar or Bat Mitzvah. The service uses the standard Conservative liturgy (*Sim Shalom*). Parts of the service are led by the rabbi and parts by congregants. There is usually some spirited congregational singing. Services run from 10 a.m. to 12:30 p.m. with a lively Kiddush afterward. There have been no "low hanging fruit" changes since Synagogue 2000 started.

High holiday services fill up the sanctuary of roughly 1000 seats in terms of tickets sold but only a few hours of the service are actually full. The second day of Rosh Hashanah has about half the attendance of the first day — 450 - 500. The cantor and rabbi lead most of the service with some led by congregants. It is a lively service with lots of congregational singing, not dissimilar from a lively orthodox service. There are some new English readings compiled by the rabbi.

The Key Players

Shira Cohen is the President and a member of the original Synagogue 2000 team. She is a strong advocate of change in the services and believes that in order to grow; the congregation must make its services more attractive to new members. She most closely affiliates with “**the Mainstreamers**.”

Ellen Stone is the Chair of the Ritual Committee and an ardent **Right-Winger**. She attended Yeshiva for 12 years, she is not on the Synagogue 2000 team and is already gearing up for a fight.

Bob Gold is the largest giver to the synagogue and a member of the Board. He has been too busy at work to join the Synagogue 2000 team, but is open to hearing about new ideas. He is a **Reform Classicist**.

Jonathan Newman is the leader of the Synagogue 2000 team and is a strong **Left-Winger**. He is impatient with the Synagogue 2000 process and wants to get moving with some really radical new approaches to the service.

Richard Frum is the only member of the **Right Wing** who is on the Synagogue 2000 team. He is committed to finding a way to make the Synagogue 2000 ideas work and still maintain the sense of tradition that he finds so appealing at CRA.

Rabbi Samuels has been with the congregation for 6 years. He is an enthusiastic member of the Synagogue 2000 team and has played a major leadership role on the project. He has slowly introduced changes into the synagogue services and synagogue life but has dreams of making much more dramatic changes.

The Status of the Synagogue 2000 Project

The Synagogue 2000 team has been meeting two times per month for almost a year. It has been a fabulous year of study and reflection. There has been very little attrition in the group and attendance has been high. The members are brimming with ideas and anxious to start “really doing something.” A small sub-group has been meeting and has drafted a vision statement (see box below). There is much contention about the vision statement. There have been arguments over the basic philosophy, the language, the inclusion and exclusion of certain ideas and even about the right of this group to create a vision statement.

At the last meeting before the Ojai conference there was a lengthy discussion about where to go from here. There were four basic ideas on the table:

1. **Shira Cohen’s idea** – Hold off on action for another six months. Continue a visioning process involving many more people in study and reflection and culminating in a consensus vision statement. Reasoning: “We are not ready to go ahead with change until we have a better idea of where we are going and until we have more support from the congregation.”

2. **Richard Frum's idea** – Revamp the Friday night service. Develop a new service more closely based on the traditional service, perhaps with a different prayer book, a lot more music and singing and a serious study session. Maybe even add a meditation piece. Reasoning: “Attendance is pretty low anyway and the standard Reform service is out of synch with the more traditional style that most congregants like. Most of the “Right Wing” does not come on Friday nights anyway so experimentation would be easier.
3. **Jonathan Newman's idea** – Create a “library minyan” on Shabbat morning with a truly creative service that builds on the ideas and experiences of the creative minyan that has been meeting once per month. Reasoning: “We must do something really dramatically different or people will say that nothing really happened from all those hours of meetings. A ‘library minyan’ would let us experiment with major change without offending people who like the service the way it is. Gradually, people would visit the new minyan and become accustomed to the new ideas, which might eventually be incorporated into the main service.”
4. **The Rabbi's idea** – Develop a program for the second day of Rosh Hashanah that would replace large chunks of the service with some new materials including a healing service, a long meditation, some new readings and some new music. Rationale: “Attendance is already very low on the second day. Many members find the repetition of this long liturgy to be boring and not in any way meaningful or spiritual. The more loosely affiliated are voting with their feet.” This kind of a change will reach a large number of people at a receptive time.

There was a lively and somewhat heated discussion about these ideas at the meeting and everyone was glad that they were soon leaving for Ojai 1997 where they would have a chance to compare notes with other congregations and discuss this dilemma with the liaison team.

TABLE 1

VISION STATEMENT
(in progress)

PRAYER

- The feeling of a **real** community engaged in a **real** prayer.
- Joyful music and singing with high attendance and participation.
- Steeped in the tradition but open to creative additions or adaptations.
- Congregants participate in leading services.
- Cognizant of different ways of thinking about God.
- Liturgical flexibility within the boundaries of Jewish law.
- Serious study as an act of prayer that is part of every service.
- Healing part of every service.
- A variety of prayer experiences that reflect the diversity of the community

AMBIENCE

- Physical space and human interaction make newcomers and regulars feel welcome 100% of the time.
- New members are integrated into the community in a conscious and thoughtful manner.
- Small groups are available to meet many different interests and needs.
- No one in the congregation feels alone in times of stress or crisis.

PART I – STUDY QUESTIONS

Please come to the first session prepared to **argue** your answers to the following questions. Even if you see pros and cons to other positions, please **argue** your position strongly.

1. What is good about CRA's vision statement? What needs more work?
2. Should CRA go ahead with an action program, or should they continue working on their vision statement?
3. If they do work on their vision statement, how should they do it?
4. If they do decide to take action, which proposal makes the most sense and why? Or is there another venue for change that you would suggest?
5. What would a parallel set of action options look like for a healing track congregation.

Note that there are no right or wrong answers to this case. It is designed to foster discussion on the key issues and not as a test of whether you can find **the** answer.

CONGREGATION RODEPH ALPAYIM: A CASE STUDY

PART II – THE DECISION

After much reflection and discussion at Ojai 1997 and a contentions meeting upon their return that lasted until 1:15 a.m., the Synagogue 2000 team decided to go ahead with the rabbi's idea of revamping the second day of Rosh Hashanah. The major reasons were as follows:

- ¶ It was a way of doing something really different without attacking (yet) the two Shabbat services to which people are most attached.
- ¶ The rabbi's enthusiasm and creative ideas for the second day of Rosh Hashanah got the team very excited.
- ¶ The timing was good in that it allowed a full nine months for planning and processing the change.
- ¶ There was a strong belief that it would set the stage for broader changes the following year.

The team also decided to go ahead with further work on the vision. They decided to move forward with a plan for an on-going series of visioning workshops as well as setting up an opportunity for a second cohort to go through the itinerary.

The beginning of the team's next meeting was devoted to a lengthy discussion of how to move forward with the high holiday idea. One question concerned how to link back to formal structures in synagogues.

Should the idea be brought to the Board? the Ritual Committee? What is the right order? Are there other committees that need to be involved?

Another question was whether there needs to be some input or involvement from the rest of the congregation. Should there be some communication to the congregation (e.g. a letter, an article in the newsletter)? Should there be a congregational meeting?

The most difficult challenge however revolved around the question of how to explain the idea. As John Newman put it, "How can we possibly get them to a place where they understand what we now understand and where they see what we now see? We have been through months of study and reflection together as a group; learning, struggling, challenging each others basic assumptions. How in one, or two or even three meetings could we ever get them to understand the potential of these new ways of thinking."

They left all of these issues up in the air and decided to move on.

The second part of the Synagogue 2000 meeting was devoted to a discussion of the plan for continuing the visioning process.

There were 5 basic questions discussed:

1. Who should be involved in the process (e.g. the original Synagogue 2000 team, another 20 people, the whole congregation)?
2. What should the process look like
 - A repeat of some or all of the itinerary
 - New study materials
 - Deliberation and discussion
3. How should the formal synagogue structures be linked in?
4. What is the goal of the process?
5. When can it be considered completed?

CONGREGATION RODEPH ALPAYIM: A CASE STUDY

PART II – STUDY QUESTIONS

Tomorrow's session will focus on how to bring the high holiday idea to the rest of the congregation and on how to work with the existing structures in the synagogue to bring about the realization of this idea.

Please come prepared to **argue** your position on the following:

1. What is the best approach to bring this concept to the rest of the congregation? Who are the key groups that need to be brought into the process? What is the best order for these meetings?
2. How would you organize the message to make a compelling case for the project?

We will also discuss ideas about how to move forward with the visioning process.

CONGREGATION RODEPH ALPAYIM: A CASE STUDY

PART III – THE MEETING

After several meetings, the Synagogue 2000 team came up with a plan for moving forward with the high holiday idea. They decided that it was best to go straight to the Board with the idea. Their concern was that if they went to the Ritual Committee first, the Board members would hear about it anyway and would “dig in their heels” even before the Synagogue 2000 team had a chance to present and explain their ideas. The hope was that after the Board approved the plan, then a meeting of the whole congregation could be held to explain the plan and solicit feedback.

The Synagogue team decided that it would be impossible to bring the Board members fully into the thinking and ideas of the Synagogue 2000 process but they came up with a series of presentations through which they would try to give Board members an overview of the most important ideas behind the proposal.

The Rabbi was out of town at a convention that week, but they decided to go ahead with the presentation without him.

The Presentation

The Board meeting began with an introduction by Shira Cohen about the project and the work that the team had done to date. She showed the Synagogue 2000 video. Then John Newman spent 10 to 15 minutes reviewing the philosophy of Synagogue 2000 as well as some highlights of the ideas the team has learned. Richard Frum presented the Synagogue 2000 team’s vision-in-progress and the plan for continuing the team’s work in this area.

Until this point the meeting went very well. There were lots of questions and concerns about the vision-in-progress but these were quickly diffused by talking about the process and the fact that there would be plenty of opportunity for input from the Board and other members of the community.

Then Shira Cohen presented the proposal for the second day of Rosh Hashanah. She handed out the attached written proposal. Before even a word came out of her mouth, Ellen Stone began to turn red. Then she stated in a raised voice, “This is much worse than I thought. First of all, how **could** you be putting a proposal this radical in front of the Board without sharing it first with the Ritual Committee. I heard about this, you know, through the grapevine. I’ve had at least 15 phone calls from some of the more traditional members of the Shul who had heard that we might be doing some kind of new age thing on the second day of Rosh Hashanah. Let me tell you, they are pretty upset about this and I’m upset about it too. Look, the people who come the second day and sit through the whole thing are the core of our community and most of them are more traditionally minded. I don’t think we should do this to them. Also the proposal itself is appalling. Meditation, English readings, healing services. This doesn’t seem to fit with what this shul is all about or at least with what it is about for me.”

When she stopped her diatribe there were tears in her eyes. There was a moment of shocked silence. Then everyone started talking at once. Shira finally quieted down the group. It was clear that her prepared presentation was not going to work.

Bob Gold said: "I don't like this at all. I don't like the process that was followed here. I don't like getting this proposal at the meeting and having to react off the top of my head."

"It is clear that we have much to discuss about this project but let me remind everyone that this is just a proposal. It is nine months until the high holidays. There is plenty of time for discussion, for input, for adapting the idea, even remaking the proposal. Ultimately, we can throw it out and start again, if we need to. We are trying to get a discussion started tonight, not to make a decision."

Some of the Synagogue 2000 team members then started to defend the proposal. "Why did we sign up for this project if we weren't open to change" said one. "Why don't you just let us try this once and see how it goes" said another. "You haven't even given us a chance to explain the idea" said a third. Another chaotic discussion ensued.

Shira decided that the meeting had deteriorated to such a degree that it was best to adjourn early and regroup. So she suggested "Why don't we have a communal meeting to solicit ideas and input from the members. We could have a Shabbat afternoon meeting with childcare. Let's see how our community feels about these ideas and then we can decide. We need to be open to scrapping this idea completely but I want to ask you, Ellen, and others here who are uncomfortable with the proposal, to come to the meeting, to listen with an open mind and to help me think about whether there might be some solution short of giving up entirely on this idea.

Everyone was happy to see the meeting come to an end and to escape from this uncomfortable conflict situation.

CONGREGATION RODEPH ALPAYIM

Proposal for the Second Day of Rosh Hashanah

Rabbi Samuels
The Synagogue 2000 Team

It has been our custom in previous years that the service on the morning of the second day of Rosh Hashanah is very similar to the service on the first day. Some of the *piyyutim* (medieval poems) are different, and there are more modern readings, but the greater part of the liturgy is similar on both days.

We propose that we take the time on the second day of Rosh Hashanah to explore/experience some different forms of liturgy. These might be based around the three special themes of the Musaph service of Rosh Hashanah: *malchuyot* (sovereignty, healing and power), *zichronot* (memories, tradition) and *shofarot* (praise, revelation).

The traditional liturgy would remain in an abbreviated but halakhically valid form. We think it is critical that the new explorations be embedded in the middle of the traditional service. There is a risk of seeming to encourage two separate observances of Rosh Hashanah, which is not our intent at all. The Congregation should retain its commitment to the traditional liturgy and reflect the diverse interests of the membership.

The time needed to do this could be found by eliminating the repetition of the Amidah in *shaharit* and *musaf* and by eliminating a formal sermon and address by the leadership of the community. We suggest that the rabbi and cantor lead the preliminary sections also, to ensure that we keep to the time schedule.

We propose the following time schedule

| | |
|----------|--|
| 8.45 AM | Pesukei deZimrah |
| 9.00 AM | Shaharit |
| 9.45 AM | Torah Service (without "mi sheberakh for healing") |
| 10.40 AM | Shofar blowing |
| 11.00 AM | New Liturgy |
| 12.30 PM | Musaf |
| 1.30 PM | Announcements, Adon Olam |

The "new liturgy" section would include a service of healing, new prayers from various recently published sources, English readings, new melodies and psalms/songs of praise, sounding of the Shofar and some quiet, meditative experience.

CONGREGATION RODEPH ALPAYIM

VISIONING PROPOSAL

Over the last year, a team of people from CRA have been involved in a project with 15 other synagogues from around the country. The project has involved a team of 20 people from our congregation in a process of study and reflection about who we are and where we are going. The focus has been on our prayer services and on the ambiance of our community.

One outcome of the project is that we have begun to create a vision statement to help us **articulate** a picture of what we want to build toward as a community. We believe that without such an articulated vision, it will be hard to move forward together in a serious way.

The vision statement we've developed is a good start, but clearly much more work is needed. We therefore propose the following plan:

1. We will set up a second cohort to study the Prayer itinerary from Synagogue 2000. We will ask for volunteers who want to join. Members of the first cohort will teach the second.
2. We will create a visioning team that will hold four visioning workshops during the year. Members will be:
 - four members of the original Synagogue 2000 team
 - four members of the second cohort
 - four members who have not been involved in Synagogue 2000
3. We will have a Board retreat in the fall to engage the Board in this discussion.

We look forward to comments and ideas about this plan.

CONGREGATION RODEPH ALPAYIM: A CASE STUDY

PART III – STUDY QUESTIONS

Please come to our last session prepared to **argue** a position on the following questions:

1. What went wrong? Why did this meeting blow up? What should the team have done differently?
2. What should they do now?

CONGREGATION RODEPH ALPAYIM: A CASE STUDY

PART IV – THE CONCLUSION

The day after the difficult Board meeting Rabbi Samuels met with Shira Cohen and Jonathan Newman. They were discouraged but they did not want to give up. Rabbi Samuels suggested a plan:

1. Speak to each Board member on the phone and understand their perspective.
2. Meet individually with the members of the Board and the community who are most upset about the idea. Include Bob Gold and other large donors. Listen to their objections. Try to solicit their agreement to hold back from voicing their objections at the communal meeting.
3. Amend the proposal based on the input and objections.
4. Take the proposal to the Ritual Committee.
5. Hold a community meeting as planned.
6. Make further adjustments if needed.
7. Bring the plan back to the Board.

“Look,” said Shira “It’s going to be a lot of work, but we have to do it.”

Rabbi Samuels suggested, “I think part of the problem is that people just don’t get it. They can’t imagine what the new liturgy will be like. I think I should bring some samples to the community meeting and maybe even have Cantor Risker sing some of the new melodies. If they can “taste and see” (to quote one of our psalms) they might feel differently about this.”

They all agreed to the rabbis idea and to the plan. The individual phone calls and meetings were held. It turned out that what people disliked most was the feeling of not being involved in the process. There were really only 15 people with objections to the proposal. Their major problems fell into three categories:

- Not rooted in tradition
- Not *Hulachic*
- Too weird and different

The whole Synagogue 2000 committee worked on the proposal and made some important changes to link the new material more strongly to traditional liturgical forms. At the same time, the rabbi and cantor pulled together some of the actual material for the service.

The proposal was revised and an invitation to the community meeting was crafted. Both were sent in advance (see attached) to Ritual committee members.

By the time the meeting was held with the Ritual committee, the proposal was old news. Everyone in the community had discussed it and discussed it. There were surprisingly few objections raised at the meeting. Ellen Stone was not happy but she said, “I think you’ve made some important changes to the original proposal. Let’s see what the rest of the community

thinks. I am never going to be happy with this but I'm willing to suspend judgement until after next Sunday's communal meeting."

The communal meeting invitations went out (see attached). The rabbi and others on the Synagogue 2000 team made phone calls to encourage people to come and to prepare them about the issues. 55 people attended.

The meeting began with the rabbi giving an *halachic* and historic perspective on the development of our liturgical customs. This talk later became a sermon (copy attached) given during the high holidays.

Then he handed out some samples of the new liturgy and Cantor Risker sang some of the new music, including a meditative niggun. The niggun was really the turning point. After it was sung there was silence for a long time and the energy level of the objections seemed to drop significantly.

The proposal was amended again and passed the Board unanimously with one abstention.

Over the summer the rabbi and the cantor crafted the liturgy and a small group including some Synagogue 2000 members and some of the right-wingers reacted and helped refine the material. Originally they had wanted to write it as a group but eventually they decided that a committee cannot create the kind of cohesive art that makes for great liturgical experience.

The liturgy was approved by the Ritual Committee and the Board at the end of the summer. The holidays came and there was an enormous excitement in the community about this experiment. Attendance the second day of Rosh Hashanah was almost as high as the first day. Everyone was curious.

In the end, the new liturgy was very successful. Some of the right-wingers admitted that even they were very moved.

Different people liked different parts of it. Some parts didn't work at all but the overall experience was very positively received by all but a few. Perhaps most importantly, it started a conversation about new forms of prayer throughout the community.

Ten days later, Ellen Stone gave the community address on the morning of Yom Kippur (see attached). Perhaps it was the spirit of *teshuvah* or the mood of forgiveness but she shared with great courage, humility and sense of humor some of the ways her views on changing the services at CRA had changed.

**Invitation to a discussion on
services for the second day of Rosh Hashanah**

"Many will teach us to be eloquent...who will teach us to be silent"

Rabbi Abraham Joshua Heschel

Dear members of the community,

Each year as we journey through the liturgy of the High Holidays, it seems that there is so much that we might celebrate together; there are many songs of praise and prayers that express our hopes and dreams. Somehow we do not find much time for silence together and to turn to the compositions of our own era, - because the traditional liturgy, printed in our Siddurim is so long.

The Ritual Committee (concerned with services and religious celebrations) commends to the community a proposal that we make time on the second day of Rosh Hashanah for a creative / reflective service. This will be based on the themes of Rosh Hashanah, incorporating time for silent reflection, prayers, psalms and songs for healing, poetry and prayers drawn from the contemporary teachers, thinkers and rabbis.

The time for this creative liturgy would mainly be found by dispensing with the sermon, leadership address, and some readings. The traditional part of the service would begin a little earlier than usual, and some omissions would be made in the shacharit and musaph amidah. Those concerned about the *halachic* issues should note that these variations are practiced by various Conservative congregations, and are approved by the Rabbinical Assembly.

There will be a seudah shlishit (third Shabbat meal) on Saturday at the Synagogue to discuss this. Cantor Risker and Rabbi Samuels will share some thoughts, and there will be time for open discussion. If you cannot attend please let Rabbi Samuels, or our President, Shira Cohen, or any member of the Board of Trustees know your thoughts on this idea.

PARK SLOPE JEWISH CENTER

Proposal for the Second Day of Rosh Hashannah

After extended discussion within the Avodah Committee, and consultation with the Board and the community, the following proposal is offered for the morning of second day of Rosh Hashanah.

Two new sections of liturgy will be introduced into the service; these sections will include new liturgical compositions, prayers and readings, quiet meditative time and substantial musical content. Rabbi Samuels and Cantor Risker will meet with a small group of shul members to prepare a final version to present to the Ritual Committee and the Board by the end of August.

The new material will take between 75 and 90 minutes. Supplementary leaflets will be produced, so that there will be no need to refer to more than one text during this time. It will remain the goal for services to conclude by 1:40pm, and the time needed will be found in the following ways:

- The rabbi's sermon will be limited to a 5 minute introduction to the new liturgy
- Elimination of the "normal" supplementary readings
- Elimination of the address by the leadership of the congregation
- Eliminating some of the traditional *piyyutim* (medieval poems)
- Commencing the preliminary service at 8:30m rather than 8:45am
- Using a "heicha kedushah" for the musaph (additional) service

The traditional 100 blasts of the shofar will be observed by sounding the shofar during the Torah service, the silent Amidah and the Kaddish Shalem. A few "additional" soundings may be incorporated in the new liturgy.

Much of the motivation for this proposal is to expand the music that the community encounters each year. This approach to the second day of Rosh Hashannah will certainly increase the proportion of time that the community sings together with Cantor Risker.

The first section will address issues of healing and the needs and aspirations of the community. This material will be included at the point that is traditional for community prayers, after the haftarah and leading into the sounding of the shofar. The liturgy will include the shofar blowing section.

The second section will be a creative development of the three liturgical themes of the musaph service on Rosh Hashannah: Malchuyot (themes of power and sovereignty); Zichronot (memory and consciousness); Shofarot (revelation and praise). This material will be included after a "heicha kedushah" for musaf.

Comparison of “Traditional” and “New” models for Rosh Hashannah

| Item | Traditional | New |
|--------------------------------------|-------------|------------|
| Start time | 8:45am | 8:30am |
| Pesukei dezimrah | Included | Included |
| Hamelech | Included | Included |
| Shema & Blessings | Included | Included |
| Shaharit silent Amidah | Included | Included |
| Reading prior to repetition | Included | Omit |
| Repetition of shaharit | Included | Included |
| “Atiti lechanenach” | Included | Omit |
| “Hashem melekh” | Included | Omit |
| “Le’el orech din” | Included | Included |
| Kedushah | Included | Included |
| Avinu Malkeinu | Included | Included |
| Introduction to Torah service | Included | Omit |
| Torah service | Included | Included |
| Introduction to Torah reading | Included | Omit |
| Introduction to Haftarah | Included | Omit |
| Sermon | Included | Reduced |
| Address by Leadership | Included | Omit |
| New Liturgy of healing and community | ---- | Introduced |
| Shofar Service | Included | Included |
| Returning Torah | Included | Included |
| Hineni | Included | Included |
| Kaddish introducing Musaf | Included | Included |
| Avot, Gevurot | Included | Included |
| Unetaneh Tokef | Included | Included |
| Kevakarat | Included | Included |
| B’Rosh Hashannah yekateivu | Included | Included |
| Kedushah | Included | Included |
| Vekol ma’aminin | Included | Omit |
| New material on RH themes | ---- | Introduced |
| Ohila La-eil | Included | Included |
| Aleinu | Included | Included |
| Birkat Kohanim | Included | Included |
| Hayom | Included | Included |
| Ein Keloheinu, Aleinu, Kaddish | Included | Included |

ELLEN STONE'S COMMUNITY ADDRESS FOR THE MORNING OF YOM KIPPUR

I'm here to talk to you about intimate relationships, prayer experiences, and fish heads. Joining a shul is a little like entering into an intimate relationship, except that you're doing it with about 200 people. You have someone to hang out with in weekends, you take care of and are taken care of, and after the initial relationship-building work is done, you start to create a family within the community. If you become a regular and you're lucky, you soon have about 75 members of your new synagogue family telling you exactly how to raise your children. It's kind of like finding a partner and inheriting a bunch of children, cousins, mothers-in-law and grandparents all at the same time. A bit overwhelming perhaps, but once you get used to it, you realize how incredibly gratifying it is.

But, like any significant relationship, your relationship with the shul involves some giving back, and some giving up, some sacrificing. Over the last year, many of you have received phone calls from some committee chair, asking if you could give up some of your time to paint the shul, attend a meeting, or stuff some envelopes. In the last week, most of you have received phone calls from a Board member, and last night all of us heard a direct appeal, asking us to give up some of our money to the shul. And, even though most of us frequently feel strapped both for time and money, in some ways these are the easy things to give up for our shul. We know exactly what's being asked of us, and we can qualify how much we can give, in minutes and hours or dollars and cents.

What's harder to think about is the intangible things that you give up when you join a synagogue community. Like any other relationship, entering into a shul relationship can involve a certain loss of autonomy, of independence, of the ability to have things the way you alone want them to be. All of a sudden, decisions about some aspects of your life, and particularly your religious life, need to take into consideration anywhere from 50 to 500 other people.

I think that nowhere in the life of a synagogue is this issue more salient than when it comes to prayer services – Friday night, Shabbat morning, weekday mornings, and on the holidays throughout the year and the High Holidays. Each of us has our own ideas about prayer – about whether, how and when we pray, about what form the prayer must take in order to have meaning, about what words we do or don't like to say, and about the context in which we pray. In fact, prayer is an issue that stirs people's passions. Those of us who grew up with certain prayer traditions and memories may feel passionately either about continuing to pray exactly the same way that we used to, or about having an adult prayer experience that's dramatically different from those we experienced growing up. Those of us who don't come with vivid memories or associations may care passionately about creating exactly the right prayer experiences as an adult.

Here at CRA, this diversity of backgrounds, interests and passions is one of our greatest strengths as a community. But, it's also one of the greatest challenges we face. How do we create prayer services that meet the needs and passions of several hundred people with dramatically differing needs and passions? How do we ensure that Shabbat morning is a

meaningful experience for both the most traditional and the least traditional daveners among us? And, how do we remain open to each other's needs, and remain able to listen constructively to each other as we talk about the difficult subject of prayer?

I've been thinking a lot about these questions over the last few years, in my role as chair of the Synagogue's Ritual Committee, and especially more recently since the Synagogue 2000 project has started. There have been times when I've found myself having to struggle very hard to stay open to other people's needs and passions, when I've had to fight hard to make myself listen to others, especially when they were telling me that the traditional high holiday services didn't always "work" for them. I think that while it's easy for us to look at someone else's prayer style and say, "Oh, that doesn't work for me," it's often harder to remember that the way **we** want to pray may not work for them. I feel like I learned that lesson the hard way this summer, as the Ritual Committee wrestled with our discussions of our high holiday liturgy, and of finding the balance in a prayer experience.

Often it's easier to fall back on the position that my way is the right way, and life – and services at the synagogue – would be perfect if everyone else just realized that. Sometimes on Shabbat morning, when services are getting a bit long, I retreat into a daydream and fantasize about my ideal shul, where everyone does realize that. In my ideal shul, the service is completely traditional – fully egalitarian, but completely traditional. We say every word of every prayer in Hebrew, though we somehow manage to start at 11 am and are always done by 12:30. In my ideal shul, my favorite Torah readers do all the Torah reading, the 'd'var Torah' or sermon is never a second over 15 minutes long – partly because people actually pay attention to my little "time signals" – and nobody uses tunes that I don't like. There are no explanations or interruptions in the prayer service, and at kiddush, somebody has kindly cut the heads off the smoked fish, so I don't have to look at them.

I'm really very happy in my ideal shul, until the moment that I start looking around to check out the crowd. That's when I start noticing that the only thing wrong with my ideal shul is that there's nobody else davening there. All of my friends and community members must have gone to daven in **their** ideal shuls, where services begin and end on **their** schedules, all of **their** favorite tunes are sung, and the prayers are designed to conform to **their** needs and preferences.

Generally at this point in my daydream, somebody sitting next to me gives me a hard nudge, and I come back to reality on a bench at CRA. I come back to the reality that the d'var Torah has been going on for 18 minutes, somebody is doing a very long explanation of one of the prayers, the clock is ticking, and somewhere in the kitchen, I know there's a fish head with my name on it. But, I also see that there are 100 other people in the room participating in a prayer experience that, on some level and in some way, seems to touch each one of them.

As that number of people grows, and as that growth is likely to bring with it even more diversity in people's prayer needs and passions, the challenge will grow even greater to find ways to balance those needs and passions, and to create a prayer experience that allows each of us to find our way in. Each of us has our own path to prayer. For some of us, the signposts are in Hebrew, for others in English. For some of us, the comfortable path is straight and narrow, for others of us, it takes some creative twists and turns along the way. Our challenge remains figuring out

how to make those paths converge, and to create a common experience that touches each of us. I hope that those of you who have been here at our Friday night and Shabbat morning services recently, agree that we've begun to meet that challenge and to create that common experience. And, I hope that those of you who haven't yet shared in those experiences decide to give it a try, and to come find your own path to both prayer and community at Congregation Rodeph Alpayim. It may not be your ideal shul, the one of your fantasies, but as reality goes, it seems to work pretty well. And sometimes, we all just need to be reminded of that. So, next time I find myself getting irritated by a tune I don't like, or getting impatient with a long sermon, or sitting through the next presentation from the Synagogue 2000 team, or even catching the eye of a whitefish at kiddish, I'll just remind myself that in prayer, as in so many other things, being part of a real community is worth giving up my fantasies.

D'var Tefillah on the Liturgy – Yamim Nora'im

We have grown accustomed to our services – their look and feel, their melodies and moods, the words and gestures. Even when we do not understand, there is a comforting familiarity. Our rituals seems to be as old as our religion – to stretch back to Moses and the founding of our faith.

Yet... if Moses were to walk out of the pages of the Chumash and into any synagogue of our time – Orthodox, Reform, Hassidic, Reconstructionist, whatever – he would not have the faintest idea what was going on. He knew of no blessings, no set prayers at all, no psalms, no reading of the Torah, and our melodies were not yet a dream in the inner ear of a cantor, composer or rabbi. In fact Moses never met a cantor – or a rabbi. It is a supreme irony that our tradition calls him Moshe Rabbeinu (Moses our rabbi) for Moses was never ordained – he never attended Yeshivah or opened a page of Talmud.

We read, and believe, that Moses came close to God, closer than any human being ever did again, that Moses was filled with awe and reverence, - and even fear; that he fell to his face in wonder, that his face shone with a luminosity that could not be dimmed as a result of what he saw. He heard the proclamation of God's attributes, that we still chant each year – and yes he would recognize the proclamation "Shema Yisrael..." – for he wrote it.

They knew of "services" in the time of Moses – but the service was of offerings and sacrifice; his own brother was anointed as the High Priest. "Avodah" – service was the scattering of wine and oil and blood – the burning of incense and animal flesh, and providing tithes to support the priests, levites and the poor.

It would take more than a thousand years for our People to innovate the concept of the blessing – of ordered prayers, or rabbis and cantors. This innovation happened slowly – and creatively. At first, the leader of the service had no book of prayers (to write such a book was forbidden). There was an outline of themes – of creation and Divine love – of salvation from Egypt, of recalling our ancestors, of God's power and holiness, of offering thanks and praying for peace, - to name a few.

The leader would improvise the words around these themes and the prayers could be different every day of the year.

Much later the words were written down – and regional variances developed, now called "minhag" – custom, and cherished or resented according to personal disposition. The surrounding prayers and poems (or piyyutim) grew and became fixed over time.

Now, with historical consciousness and a sense of our (sometimes limited) spiritual stamina balancing our love for the tradition, we look at our own forms of service. Where do we hold fast to the words, nuances and cadences of our parents and grandparents. Where do we look for the spiritual bravery of our sages of thousands of years ago. They survived the destruction of the Temple, the end of the form of service they knew. They created new forms that reflected the needs of their time.

They had a vision and taught: “Yes there is an avodah; but now it must be an avodah – a service – of the heart/mind. What will this avodat halev be? It must be prayer!”

Let us strive for their bravery – to create a service that touches our hearts and minds, even as we strive for the echoes of our childhood, and the presence of our beloved parents and grandparents. We can — we must work together, this year, and in the years to come, to make CRA a place where the service of the heart and mind are real, relevant and meaningful to us and to new people who walk through our doors. We must find a way to do this without losing the traditional feeling that makes CRA so special. We can do it ... it will be hard work...we can do it if we keep our eye on **why** we are doing it. As our sages said: “Know before whom you stand.” We must remember the One who is listening.

**CIJE Synagogue Change Research Project:
Research Proposal Summary**

Dr. Lisa S. Malik

March 31, 1998

**CIJE Synagogue Change Research Project:
Research Proposal Summary**

RESEARCH QUESTIONS

- 1) WHAT IS HAPPENING IN THE ARENA OF SYNAGOGUE CHANGE?: WHAT DOES A MAP OF THE LANDSCAPE OF SYNAGOGUE CHANGE LOOK LIKE?
 - 2) WHAT ARE THE VARIOUS DEFINITIONS AND CRITERIA OF SUCCESS FOR EACH CHANGE PROJECT?
 - 3) WHAT HAVE BEEN THE PERCEIVED OUTCOMES OF THESE SYNAGOGUE CHANGE PROJECTS IN TERMS OF PROCESS IMPLEMENTATION AND IMPACT?
 - 4) WHAT FACTORS ARE ASSOCIATED WITH SUCCESSFUL SYNAGOGUE CHANGE?
-

**RESEARCH METHODOLOGY:
OVERVIEW**

The overall research design is based on input from CIJE's Synagogue Change Research Project Leadership Team, members of the Research Advisory Committee, CIJE staff and consultants, and participants in several research consultations convened by CIJE. Thus, the proposed research methodology incorporates insights from Jewish education professionals who are involved in change project management at the national and regional level, as well as from professors and researchers in the fields of Jewish education, general education, sociology, social psychology, organizational behavior, and statistics.

As a direct outcome of the January 1998 research consultation in Chicago, we decided that it was necessary to create a "map" of the landscape of synagogue change projects before proceeding to conduct any field research at the synagogue level. The "map" will constitute Phase I of this study, with the unit of analysis being synagogue change projects. We will get feedback on the "map" from the Leadership Team, the Research Advisory Committee, CIJE staff and consultants during Phase II. The input we get during Phase II will inform our study's conceptual framework and will enable us to refine our research design for Phase III. Phase III of the study will be field research at the synagogue level, with the unit of analysis being synagogues themselves. An optional Phase IV is also included in this proposal, although its implementation would take us beyond our ideal time frame of 1998/1999.

**Research Methodology: Phase I:
"MAP" OF SYNAGOGUE CHANGE PROJECTS**

In Phase I, we intend to develop a "map" of planned change projects with an emphasis on projects that consider themselves to be synagogue change projects and that view institutional change as their primary objective. The map will enable us to answer research question #1, as well as to understand the change project leaders' perspectives regarding research questions #2, #3 and #4. In the "mapping" phase, we will aim to identify and describe all of the major synagogue change projects that are currently being implemented across the country. By interviewing those individuals who are involved in leading synagogue change projects at the national and regional level (and at the synagogue level if the project is a single-site change project), we hope to gain an understanding of the various projects' objectives, change processes, and definitions of "successful synagogue change". We will attempt to uncover as many change projects as possible by getting referrals from change project leaders and other leaders in regional and national Jewish agencies.

Our intention is to include change projects of all kinds, including those that aim to change the synagogue as a whole, those that aim to change the synagogue school as a whole, and those that focus on one or more targeted aspects of synagogues (e.g. family education) in an effort to transform the institution. We will attempt to "map" change projects that are managed by different types of Jewish communal organizations-including transdenominational national organizations, regional Federations and Central Agencies of Jewish Education, foundations, individual synagogues, and the denominational Movements.

Our primary sources of data for the "map" will be interviews with change project leaders and written documents describing the various change projects. While the main objective of the interviews will be to gather descriptive information about existing synagogue change projects, we will also ask interview subjects to articulate their "hunches" about factors linked to "successful synagogue change". These "hunches" will enable us to gain a better understanding of the change project leaders' theories of change and the underlying models behind each change project.

Research Methodology: Phase II: **FEEDBACK ON PHASE I & INPUT FOR PHASE III**

During Phase II, we will get feedback on the "map" from the Leadership Team, the Research Advisory Committee, and CIJE staff and consultants. We will synthesize the change project leaders' definitions of success, perceived outcomes, and "hunches" about "factors linked to successful synagogue change" during a Leadership Team meeting in June, 1998. A conceptual framework for Phase III of this study will be developed, which will be informed by a brief literature review and by the "hunches" generated and synthesized at the June Leadership Team meeting. During Phase II, we will also refine our research design for Phase III after getting input on methodological issues such as sampling strategies and the site-selection process.

Research Methodology: Phase III: **SYNAGOGUE-LEVEL RESEARCH**

Defining synagogues as the unit of analysis, we propose a multiple case-study design (Yin, 1989), incorporating qualitative methods such as interviews and focus groups. Case-study research at the synagogue-level will enable us to answer research questions #3 & #4, as well as to answer research question #2 from the perspective of professionals, lay leaders, and congregants at the synagogue level (to supplement our answer to question #2 from the perspectives of the change project leaders at the national and/or regional levels during Phase I). In Phase III, we will aim to describe the various definitions of success used within synagogues, the ways in which actual implementation of the change process in synagogues matches up to the envisioned process, and the ways in which the change project has had an impact on individual synagogues and congregants. Ultimately, we will attempt to identify those characteristics of synagogues and of change processes that are linked to successful synagogue change, based on the change projects' and synagogues' own definitions of "success".

We are considering focusing on a few factors that are potentially linked to success such as: the role of leadership, the role of articulated visions, the level of specificity of the outside consultant's vision, the match between the vision of the reformers and the synagogue, the role of outside consultants, and the influence of the environmental context. The specific list of possible factors upon which we will focus in Phase III will be based on the "hunches" generated by the change project leaders in Phase I, "hunches" generated by CIJE staff (that are informed by professional experience and a brief literature review), and additional "hunches" generated at the Leadership Team meeting in Phase II. While this will not be a confirmatory deductive study that tests formal hypotheses, it will use "hunches" to develop conceptual categories that will guide and bound the data-collection process. Phase III will be a descriptive and analytic study that has certain a priori propositions but that will also explore additional factors that emerge during the field research.

Phase III: Site-Selection for Synagogue-Level Research

In Phase III, it is our aim to conduct field research in synagogues from change projects in each of the following categories:

- planned change projects that aim to change the synagogue as a whole
- planned change projects that aim to change the synagogue school as a whole
- planned change projects that focus on one or more targeted aspects of synagogues (e.g. family education) in an effort to transform the institution

Within each of these categories¹, we will select at least one synagogue change project. Within each change project, we will select at least 2 synagogues (unless the change project is a single-site project that only involves one synagogue). The exact number of synagogue sites in Phase III will be determined once the "map" is complete and once we have gotten further input from the Research Advisory Committee, the Leadership Team, and other CIJE staff and consultants during Phase II. At present, we estimate that we will conduct qualitative field research in 6-14 sites².

We will get input from the Research Advisory Committee, the Leadership Team, and other CIJE staff and consultants before making final decisions on our sampling strategy. The recommended sampling strategies are one of the following:

- "Ideal-bellwether-case selection"(Goetz & LeCompte, 1984; Merriam, 1988):
cases of exemplary synagogues in which the change process is deemed to be "working" (i.e. "successful" by internal definitions of success)
- "Extreme-case selection"(Goetz & LeCompte, 1984; Merriam, 1988):
cases of synagogues in which the change process is deemed to be "working" and cases of synagogues in which the change process is deemed to be "not working" (i.e. "successful" and "unsuccessful" based on internal definitions of success)

Regardless of which of these sampling strategies are chosen, we will focus on synagogues that are "*vatikim*", i.e. that have already been involved in a planned change process for more than a year. We will not focus our Phase III field research efforts on synagogues that are "*chadashim*", i.e. new in their involvement in the change process.

Once we determine our sampling strategy and which synagogue change projects will be represented in Phase III, site-selection (of specific synagogues that represent each change project) will be guided by the Leadership Team and other change project leaders using the overall method

¹ We might also want to study one or more synagogues that have shown evidence of 'organic change' rather than 'planned change', such as Brnai Jeshurun, Lincoln Square, or Kehillat Orach Eliezer in New York. Although these synagogues do not represent planned synagogue change projects in a purist sense, studying one or more of these institutions that are known to be "successful" by some criteria might shed some light on characteristics of synagogues that are linked to successful synagogue change (research question #4).

² Note that the logic for multiple-case studies is one of "replication logic" as opposed to "sampling logic". In multiple-case study research, each case is considered akin to a single experiment, as opposed to a single data point within an experiment; thus the analysis of multiple-case studies follows a "cross-experiment" rather than a "within-experiment" design. According to "replication logic", each case must be selected so that it either predicts similar results ("literal replication") or produces contrary results for predictable reasons ("theoretical replication"). Since case studies focus on the context of each case in addition to the phenomenon of interest, there are a large number of potential variables and "sampling logic" would require an "impossibly large number of cases-too large to allow any statistical consideration of the relevant variables". Increasing the number of cases in a multiple-case study design does not make the findings any more generalizable or statistically relevant (Yin, 1989, p.55).

of "reputational-case selection" (Goetz & LeCompte, 1984; Merriam, 1988); i.e. synagogues representing certain synagogue change projects will be chosen "on the recommendation of experienced experts in the area" (Goetz & LeCompte, p.82). Internal checks will be conducted at the synagogue-level to make sure that the synagogues referred by the "experts" match the criteria set forth in the sampling strategy (e.g. If we choose an "ideal-bellwether-case selection" strategy, we will do internal checks to make sure that the synagogues that are considered to be "exemplary" by the change project leaders are in fact "exemplary"). We will gain access to the individual synagogues in conjunction with the national or regional change project leaders.

Phase III: Methodology for Synagogue-Level Research

Our primary source of data for the synagogue-level case-study research will be interviews with key informants at each of the selected synagogues. Key informants include the rabbi, educator/principal, cantor and other synagogue staff, any outside liaisons or consultants involved in the synagogue change process (if applicable), lay leaders involved in the synagogue change process, and other congregants. Our interview schedule will be comprised of open-ended questions about definitions of success, perceived outcomes, and factors linked to success; we will include some focused open-ended and close-ended questions that probe for the specific factors that were identified as "hunches" during Phases I & II.

Another source of data for Phase III will be "conversations" or focus groups with participants in change projects at the synagogue level. The main purpose of the focus groups will be to generate participants' definitions of "success", perceived outcomes, and "hunches" regarding "factors linked to successful synagogue change". The language of these questions will obviously need to be adapted for the focus groups since many people at the synagogue level might not be speaking or thinking in terms of "success" or "factors". The conversations will take one (or more) of the following forms:

- on-site focus groups with professional staff, lay leaders, and other congregants within one synagogue
- focus groups with professional staff, lay leaders, and other congregants from a few different synagogues within one change project
- focus groups with professional staff, lay leaders, and other congregants from a few different synagogues from different change projects

The participants in these conversations will all be affiliated with one of the synagogues and synagogue change projects that we selected at the beginning of Phase III. Ideally, we will try to include lay leaders, congregants, and professional staff who are particularly "reflective" (although our selection of individuals for the "conversations" will be guided by our selection process for the sites themselves, thereby only including individuals from synagogues that are part of our sampling frame).

With the interviews and focus groups, we are particularly interested in determining how closely the "hunches" of change project leaders match the "hunches" of synagogue professionals, lay leaders, and congregants with respect to "factors linked to successful synagogue change".

Other research methods that we might consider adding to our design to further help us answer research questions #2, #3, and #4 are field observations and surveys. We will weigh the cost and benefit tradeoffs of these research methods after getting input from the Research Advisory Committee, the Leadership Team, and other CLJE staff and consultants. Observations would obviously enable us to gather more in-depth information about each synagogue, but at the expense of depth. While an institutional survey would enable us to reach a broader range of synagogues, the kinds of issues which are of interest to us may not lend themselves to a survey instrument³.

³ An institutional survey (one survey sent to a representative at each synagogue for data at the institutional level of analysis) may not be the most appropriate mechanism for addressing our research questions for the following

We may, however, opt to administer a survey to a sample of congregants within each synagogue that is represented in our case-study design, for the purpose of gathering data about the membership of each synagogue.

If we do conduct observations, our focus will be on understanding the contextual characteristics and organizational dynamics of synagogues that have been "successful" in their synagogue change efforts. Our observations would include informal "cruises" (Dwyer, Lee, Barnett, Filby, & Rowan, 1985) of the synagogue and synagogue school, as well as observations of board meetings and other meetings that are specifically related to the synagogue change process⁴. We propose to begin the data collection for Phase III in the fall of 1998.

Phase III: Analysis of Synagogue-Level Research

We will analyze the qualitative data using an iterative process of data reduction, data display, and conclusion-drawing and verification (Miles & Huberman, 1994). For the interviews, focus groups, and observations, our primary sources of qualitative data will be audio tapes and field notebooks. Interview transcripts will be coded using the conceptual categories defined during Phase II and with any new categories (descriptive, interpretive, or explanatory codes) that emerge during the field research. After coding the interview transcripts and field notes, we will compile a preliminary cross-case matrix (Miles & Huberman, 1994) that summarizes the findings from each site with respect to each synagogue's definitions of "success" and "perceived outcomes". We will compile another matrix that describes each synagogue's ranking on each of the "factors" that are potentially linked to "successful synagogue change".

After another series of data reduction and display exercises, we will cluster the synagogues we studied into outcome categories such as: 1) had low goals and did not meet them, 2) had low expectations and did meet them, 3) had high expectations and did not meet them, and 4) had high expectations and met them. We will then develop separate matrices (one for each "outcome category") in which the rows of the matrix represent each of the "factors" that are potentially linked to "successful synagogue change" and the columns represent each of the individual synagogues that are part of each "outcome category".

Next, we will compile another cross-case matrix that synthesizes the findings of the four separate "outcome category" matrices. In this summary matrix, the rows will represent each of the "factors" that are potentially linked to "successful synagogue change" and the columns will represent each of the "outcome categories". In this way, we hope to identify those factors that are linked to successful synagogue change.

Research Methodology: Phase IV (OPTIONAL): TESTING THE GENERALIZABILITY & VALIDITY OF PHASE III'S SYNAGOGUE-LEVEL RESEARCH

After analyzing the data from the synagogue-level research in Phase III, we may want to consider testing the validity of our study and determining the generalizability of our findings to

reasons: a) Issues such as "success" and "factors linked to success" may be too complex to be translated into survey questions; b) The number of variables that are potentially linked to "successful synagogue change" may be too numerous to include in a survey; c) There is a high likelihood that different people within one synagogue may have different perspectives on questions about the institution. Therefore it would be difficult to determine who should be asked to fill out the survey at each synagogue. If multiple surveys were administered to many individuals in one synagogue, it would be difficult to synthesize the information into one data point per institution.

⁴While our sampling frame only includes synagogues that are *vatikim*, we might consider observing some change project process meetings of synagogues that are *chadashim* just to get a sense of earlier stages of the change process of those change projects that are represented in our study.

other synagogues involved in change processes. There are two proposed methods for achieving these goals: a survey and a longitudinal study of synagogues that are "*chadashim*" (new in their involvement in planned change efforts). Both of these methods are beyond the scope of the original research proposal, and would not be implemented until the fall of 1999 at the earliest.

Phase IV: Institutional Survey

Based on the set of factors that are identified in Phase III as being associated with successful synagogue change, we may want to compile a survey that focuses on a few of these factors that seem most compelling. The survey could be administered to a random sample of all synagogues involved in planned change projects. This aspect of the study would be deductive in nature, and would test a few specific hypotheses about the factors linked to successful synagogue change. There are several issues that need to be resolved before such a survey is administered:

1) deciding which factors to include in the survey, to keep the number of factors at a reasonable level for meaningful analysis; 2) adapting the factors to a survey-question format; and 3) deciding who should fill out the survey in each synagogue in order to ensure 'accuracy' about certain institutional characteristics.

Phase IV: Longitudinal Study of "*Chadashim*"

Based on the set of factors that are identified in Phase III as being associated with successful synagogue change, we may consider conducting a longitudinal study of synagogues that are "*chadashim*" i.e. in the early stages of their involvement in planned change efforts. We could administer surveys and/or conduct interviews or focus groups at two different points in the planned change process: at the beginning (T₁) and again a few years later (T₂). Such a longitudinal study would be deductive in nature, with hypotheses based on the factors that we found to be linked to successful synagogue change in our Phase III "*vatikim*" cases. After Phase III, we could formulate hypotheses that attempt to predict the outcomes in T₂ for synagogues that are "*chadashim*" at T₁.

CONCLUDING NOTES

The proposed study will provide insights to Jewish communal policy-makers and practitioners who are involved in synagogue improvement and transformation. By mapping the various synagogue change projects that are currently underway, describing the various definitions and criteria for "success" within each project and within each participating synagogue, highlighting some of the perceived outcomes of these change projects, and identifying some of the factors that are associated with success across projects, this study will advance our understanding of synagogue change.

CIJE Synagogue Change Research Project:

Research Proposal Summary

Dr. Lisa S. Malik-3/31/98

APPENDIX

- Research Questions in more detail
 - Proposed Steps
 - Proposed Timeline

**CIJE Synagogue Change Research Project:
Research Questions**

1) WHAT IS HAPPENING IN THE ARENA OF SYNAGOGUE CHANGE?: WHAT DOES A MAP OF THE LANDSCAPE OF SYNAGOGUE CHANGE LOOK LIKE?

(focus: planned change projects that consider themselves to be synagogue change projects & whose primary objective is institutional change)

- What planned change projects are there?
- What are the stated objectives of these projects?
- What are the stated Jewish educational objectives of these projects (if any)?
- What is the envisioned design for change (i.e. the change process) for each of these change projects?

2) WHAT ARE THE VARIOUS DEFINITIONS AND CRITERIA OF SUCCESS FOR EACH CHANGE PROJECT?

3) WHAT HAVE BEEN THE PERCEIVED OUTCOMES OF THESE SYNAGOGUE CHANGE PROJECTS IN TERMS OF PROCESS IMPLEMENTATION AND IMPACT?

(based on the change projects' and synagogues' own definitions of success)

a) PROCESS IMPLEMENTATION:

- How does actual implementation match up to the envisioned process?
- In what ways have individual synagogues adapted their change processes to meet their individual needs?

b) OUTCOMES/ IMPACT:

- What has been the perceived impact on synagogues and on individual participants (based on the change projects' and individual synagogues' own definitions of success) ?
- Note: outcomes might be locally defined as changes in process ('changes in the way the synagogue does its business') and/or impact on congregants and/or impact on the institution

4) WHAT FACTORS (characteristics of synagogues & of change processes) ARE ASSOCIATED WITH SUCCESSFUL SYNAGOGUE CHANGE?

(based on the change projects' and synagogues' own definitions of success)

We might want to focus our study on a few factors that are potentially linked to success such as: the role of leadership, the role of articulated visions, the level of specificity of the outside consultant's vision, the match between the vision of the reformers and the synagogue, the role of outside consultants, and the influence of the environmental context. We might also want to compare the relative impact of an imposed vs. a self-defined vision and the relative impact of an imposed vs. a self-defined process.

Note: The unit of analysis for questions #1 & #2 is the change project. The unit of analysis for questions #3 & #4 is the synagogue.

Note: While we will not focus solely on educational outcomes, we might want to consider if the answer to question #4 is different for change projects that do emphasize educational outcomes.

Synagogue Change Research Project 1998-1999: Proposed Steps
Draft: 3/31/98

PHASE I:

- 1) Start-Up: Karen provide background information to Lisa; budget; research questions; preliminary research design; interview schedules for maps
 - 2) Input from CIJE insiders (Pearl, Ellen, Cippi, Susan): research questions, Research Advisory Committee, preliminary research design, scope of mapping
 - 3) Assemble Research Advisory Committee(RAC) to give input on research issues; get ongoing input from RAC members on methodology issues
 - 4) Meet & Interview Leadership Team/ Change Project Leaders: mapping, definitions of success, perceived outcomes, hunches
 - 5) Create map of synagogue change projects: research question #1 (& change project leaders' perspectives on #2, #3 & #4)
-

PHASE II:

- 6) Literature review (Per KAB: not extensive): focus on research question #4 (factors linked to successful change)
 - 7) Preliminary list of definitions of success & hunches re: factors linked to successful change (based on lit. review & experience & mapping phase)
 - 8) Leadership Team Meeting: reactions to map; synthesize definitions of success, perceived outcomes, and hunches; input on field research; site selection
 - 9) Revise hunches and develop categories of definitions of success & perceived outcomes (based on Leadership Team meeting)
 - 10) Input from 'CIJE insiders' and RAC (meeting?): re: research design, conceptual framework, sampling, site selection, interview questions, "conversations"? survey? observations?
 - 11) Finalize research design, hunches, conceptual framework (including definitions of success), and sampling strategy
 - 12) Finalize interview questions for field research (and develop survey if needed)
 - 13) Select synagogues for field research
 - 14) Gain access for synagogue field research
 - 15) Hire researchers for field research
 - 16) Train researchers for field research
-

PHASE III:

- 17) Field Research: observations (?) and interviews of participants in ____synagogue sites: research questions #2,#3, #4
- 18)? "Conversations"?: focus group(s) of synagogue leaders and congregants (on-site "conversations" with participants from one synagogue at a time &/or "conversations" with participants from many synagogues or change projects); research questions #2, #3, #4
- 19)? Survey?: research questions #2, #3, #4
- 20) Data analysis: individual cases & cross-case analysis
- 21) Write-Up of Phase III research

Synagogue Change Research Project: Proposed Timeline

Draft: 3/31/98

| | Feb. | March | April | May | June | July | Aug. | Sept. | Oct. | Nov. | Dec. | Jan. 99 |
|--|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|------|---------|
| 1) Start-Up | _____ | | | | | | | | | | | |
| 2) <u>Input from 'CIJE insiders'</u> | | x | | | | | | | | | | |
| 3) <u>Assemble Research Advisory Committee</u> | | | _____ | | | | | | | | | |
| 4) <u>Interview Change Project Leaders</u> | | _____ | | | | | | | | | | |
| 5) <u>Create map</u> | | | | _____ | | | | | | | | |
| 6) <u>Literature review</u> | | | | _____ | | | | | | | | |
| 7) <u>Preliminary hunches & def. of success</u> | | | | | x | | | | | | | |
| 8) <u>Leadership Team Meeting</u> | | | | | | x | | | | | | |
| 9) <u>Revise hunches & def. of success & outcomes</u> | | | | | | | x | | | | | |
| 10) <u>Input from 'CIJE insiders' and RAC (meeting?)</u> | | | | | | x | | | | | | |
| 11) <u>Finalize research design, hunches, conceptual framework, sampling, etc.</u> | | | | | | _____ | | | | | | |
| 12) <u>Finalize interview questions</u> | | | | | | | _____ | | | | | |
| 13) <u>Select synagogues</u> | | | | | | | | _____ | | | | |
| 14) <u>Gain access</u> | | | | | | | | | _____ | | | |
| 15) <u>Hire researchers</u> | | | | | _____ | _____ | | | | | | |
| 16) <u>Train researchers</u> | | | | | | | | _____ | | | | |
| 17) <u>Field Research: observations (?) and interviews</u> | | | | | | | | | | _____ | | > |
| 18)? <u>"Conversations"?</u> (on-site w. one synagogue at a time &/or cross-site) | | | | | | | | | | x | | x |
| 19)? <u>Survey?</u> | | | | | | | | | | | | > |
| 20) <u>Data analysis</u> | | | | | | | | | | | | > |
| 21) <u>Write-Up</u> | | | | | | | | | | | | > |

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 1

Title of Synagogue Change Project: Beth Am Israel, Penn Valley, PA: The Design Project: Designing an Education System for Inter-Generational Neshamot

Sponsoring Agency: individual synagogue: Beth Am Israel

Sources of Data (interviews and written materials):

Interviews:

- Rabbi Marc Margolius-5/19/98 & 5/20/98
- Cyd Weissman-4/16/98

Written Materials:

- Caro, Alan, "Design Project Grant-First Quarter Report-9/97-12/97"
- Design Project Grant Proposal
- Ha-Madrish: A Guide to the Community Of Learners-Beth Am Israel-5758

Address and Phone # For Learning More About This Change Project:

Cyd Weissman, Educational Director (610) 667-1651
Beth Am Israel
1301 Hagys Ford Road
Penn Valley, PA 19072

Sponsoring Agency Type:

- ☐ national organization
- ☐ central education agency
- ☐ federation or continuity commission
- ☐ foundation
- ☐ movement, movement-affiliated college or other organization
- ☒ individual synagogue

Type of Synagogue Change Project:

- ☒ planned total synagogue change
- ☒ planned total synagogue school change
- ☐ planned change targeted to one aspect of synagogues at a time
- ☐ 'organic' unplanned change

- ☐ national
- ☐ regional
- ☒ one synagogue

Movement affiliation of synagogues involved in this change project:

- ☐ Trans-denominational
- ☐ Orthodox
- ☒ Conservative
- ☐ Reform
- ☐ Reconstructionist

of Participating Synagogues: 1

Names & Characteristics of Participating Synagogues:

Beth Am Israel is a 300-member suburban Conservative synagogue with a Reconstructionist Rabbi. The congregation is young and family-oriented, with a waiting list to get into the synagogue. BAI has a long tradition of commitment to Torah , Avodah, and Gemillut Chassadim. There are 150 children in the religious school.

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 2

Title of Synagogue Change Project: Beth Am Israel, Penn Valley, PA: The Design Project: Designing an Education System for Inter-Generational Neshamot

Objectives of Project:

- to get people engaged in Jewish living and learning through "personal meaning-making"
 - to facilitate congregants' viewing Shabbat as the center of that engagement
 - to create a "community of practice" as a context for the school and the synagogue's other educational activities
 - to design an alternative educational model that will sustain and deepen congregants' Jewish identity
 - to build a religious, moral, learning, and socially responsible community which asks for and expects the engagement of its members
 - to strengthen community and identity so that congregants view Jewish tradition as a source of strength and comfort and as "a way and a place" to celebrate life and to live out "the rhythm of life" in a meaningful way
-
- to increase synagogue attendance at Shabbat morning services, religious festivals, and synagogue classes by 50%
 - to increase involvement in other synagogue activities by 15%
 - to increase family practice (e.g. Shabbat rituals, independent study, increased interest in Jewish social groups, increased integration of Torah principles into family and social discourse) by 45%
 - to improve the "Jewish self-image" of children and adults by 10%
(i.e. defining one's self-image primarily through a Jewish frame of reference, making a more conscious use of a Jewish cultural and religious framework for decision-making and problem solving)
 - to increase adult participation by 50% (e.g. participation in Shabbat rituals and activities)

Description of Change Project (the project's vision of synagogue life & the project's change process/"how it works"):

Vision of synagogue life:

The Design Project's vision is of a "community of engagement". Originally, the vision was of a "community of learners"; the language of the change project was changed because some congregants felt belittled by the term, in light of the synagogue's history of commitment to Torah, Avodah and Gemilut Chassadim. The vision is that all members will be engaged by the synagogue's challenge to take seriously their Jewish involvement and communal responsibilities. The synagogue "expects and enjoys a remarkably high level of congregant involvement in all aspects of synagogue life, from delivering meals to the homeless to delivering a divrei Torah. In striving to become a "community of engagement", Beth Am Israel

blends respect for tradition with openness to innovative forms of Jewish expression. It provides an alternative model for supplementary school education that actively aims to get families engaged in Jewish living and learning.

Change process:

Once the rabbi, the educational director, and a team of lay leaders articulated their vision for The Design Project, they engaged most of the members of the education committee. Some, but not all congregants, were engaged in the project. The rabbi and education director tried to change the language of the BAI community because of their belief that language impacts people's attitudes. (e.g. Since "Hebrew School" conjures up a negative image for most people, Shabbat educational programming was now called *Beit Midrash* and Sunday educational programming was called *Beit Sefer*). In addition, the rabbi and educational director tried to change congregants' expectations, particularly those of adults. BAI's challenge was to be clear that *Beit Midrash* was not intended to be a traditional Hebrew School model. It is the synagogue professionals' expectation that the *Beit Midrash* is a place where adults will go on journeys with their children. Furthermore, the Design Project envisions the synagogue as a community. Thus, the change process tried to convey this vision through the use of a newsletter that reiterated the message, "We are a community".

After articulating their vision and expectations, the synagogue professionals in partnership with the education committee implemented a host of educational programs. These programs were made known to the community through a publication entitled HaMadrich: A Guide to the Community of (Learners) at BAI which outlines all of the educational opportunities for BAI congregants and their families. The core educational program occurs on Shabbat and is, in fact, interwoven with the Shabbat morning service. The following is a brief description of "Shabbat Morning Intergenerational Learning":

We begin our Shabbat morning celebration together with coffee and danish, and then at 9 a.m. gather together in the sanctuary for morning blessings and the blessings for Torah study. We then separate temporarily into various *shiurim* (study groups) on various topics and at different levels (with *Beit Midrash* children going to their classes), and return to the sanctuary at 10 a.m. to recite and sing *kaddish d'rabannan*, the *kaddish* traditionally said after learning. Services continue with the Torah reading at 11 a.m., *mussaf* at noon and a *kiddush* following. The same format is followed regardless of whether there is a Bar/Bat mitzvah scheduled for a particular Shabbat. Beth Am Israel members and guests from sixth grade up are invited to participate in these *shiurim*.

Children in first grade and up have the option to participate in the *Beit Midrash* in lieu of *Bet Sefer* (commonly known as Sunday school). *Beit Midrash* students come to the synagogue for classes on Thursday afternoons, but also come with their families on Shabbat morning and break away into their own classes during the Shabbat service. Additional *Beit Midrash* programming includes Shabbat lunches,

continued study in the Shabbat Academy (9-10 a.m.), services (11 a.m.-12:30 p.m.), minyanim with children (11 a.m.-12 p.m.), story reading and help in the classroom (10 a.m.-11 a.m.). Students are expected to continue this study through the 12th grade.

After this educational format had been in place for two years, the education director and three synagogue lay leaders (including the education committee chairperson) wrote a comprehensive outline of the synagogue educational program's updated objectives, strategies and methods of evaluation. The strategies mentioned in the outline include:

- creating a Shabbaton experience for the synagogue community that replicates the experience in which Design Project members are expected to participate throughout the year. This Shabbaton will be a longer, more intense version of every Shabbat and will be held in October, 1998.
- developing for each family unit and each adult an "individualized educational plan" with the help of an educational guide, to determine Jewish learning and living goals for the year
- creating possibilities for families with similar "practice plans" to work together with family mentors, thereby providing support and community building
- developing a governance structure that envisions the synagogue as a whole as having responsibility for youth and adult education.
- involving adults and parents in the development of a holistic program anchored in community and real life experiences

In the upcoming year, Beth Am Israel is offering individuals and families the opportunity to define individual and family education plans (IFEP). The IFEP idea is modeled after a similar structure set up in some churches in which counselors meet with individual congregants and their families to set their individual education plans. In this way, a family could meet with the rabbi or the educational director or some other Jewish counselor approximately twice a year to discuss issues, set Jewish goals for themselves, etc. At Beth Am Israel, IFEPs will enable congregants to identify goals for Jewish engagement; BAI's professional and lay leaders will develop ways to enable people to achieve their IFEP goals.

History of Change Project (when it started, who started it, etc.):

Five years ago (summer, 1993), Rabbi Marc Margolius challenged Cyd Weissman (the educational director) to either create a better "failed model" of supplementary education or to create a new model altogether. The model that Cyd and Rabbi Margolius developed was partially inspired by the book, A Congregation of Learners (Aron, Lee, and Rossel) and by Jonathan Woocher's article on Jewish identity which expressed the idea that identity is formed by being within a community of practice and value. According to Woocher, neighborhoods used to convey these community feelings but since people no longer live in such neighborhoods (and certainly not in Jewish neighborhoods), the synagogue must now replace the neighborhood and act as that identity-forming community.

The vision and educational plan was further informed by education committee members' responses to the educational director's question, "What is your most memorable experience of Jewish learning?"; most of the answers were about family memories or community-oriented activities and some had to do with music or informal activities. The educational director and education committee then realized that if they want to impact children's memories, these are the sorts of experiences you need to recreate (many of which were in direct conflict with the traditional Hebrew school model).

Synagogue Selection Process (how synagogues were selected to participate):

n/a

Role of outside consultants:

Alan Caro is the part time project director for the Design Project. Beginning in August 1997, he interviewed a cross section of families from Solomon Schechter, *Beit Sefer* and *Beit Midrash* to get a baseline of Jewish practice for the Beth Am Israel community. From this baseline data emerged the recommendation to develop "religious therapy." Alan noticed that a lot of people have "Jewish baggage" and suggested that some sort of "therapy" would help them identify the "baggage" and figure out how to deal with it.

Role of outside organization:

The Jewish Federation of Greater Philadelphia funds the Beth Am Israel's change project and is peripherally involved in the project's implementation. Ellen Bernstein, the director of the Federation's Continuity Commission, is the contact person at the Federation who helped edit the initial grant proposal and who conducts consultations with BAI a few times per year.

How it is funded:

The Jewish Federation of Greater Philadelphia's Continuity Commission gave Beth Am Israel a grant of \$50,000 (\$25,000 per year for two years). This money has been allocated to "develop a holistic model that roots a child's education in an inter-generational community of practice and learning."

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 3

Title of Synagogue Change Project: Beth Am Israel, Penn Valley, PA: The Design Project: Designing an Education System for Inter-Generational Neshamot

Definitions of "Success":

- meeting the measurable objectives of the project:
 - to increase synagogue attendance at Shabbat morning services, religious festivals, and synagogue classes by 50%
 - to increase involvement in other synagogue activities by 15%
 - to increase family practice (e.g. Shabbat rituals, independent study, increased interest in Jewish social groups, increased integration of Torah principles into family and social discourse) by 45%
 - to improve the "Jewish self-image" of children and adults by 10%
(i.e. defining one's self-image primarily through a Jewish frame of reference, making a more conscious use of a Jewish cultural and religious framework for decision-making and problem solving)
 - to increase adult participation by 50% (e.g. participation in Shabbat rituals and activities)
- synagogue looking and feeling like a community
(indicator: a child walking into the building would know your name and be comfortable asking you for assistance)

Title of Synagogue Change Project: Beth Am Israel, Penn Valley, PA: The Design Project: Designing an Education System for Inter-Generational Neshamot

Perceived Outcomes to Date ("What's Happening?"):

1) **IMPLEMENTATION:**

2) **IMPACT:**

- general feeling of excitement in the synagogue; "you can feel" that there has been successful change at the synagogue.
- high numbers of Shabbat morning synagogue attendees
- anecdotal stories of children's and adults' "growth" at BAI
- difficulty in getting parking spots at the synagogue on Shabbat mornings
- waiting lists for the *Beit Midrash* program. In the first year of the program, 21 families participated. In the following year, an additional 21 families signed on. At this point, BAI no longer has the physical space to accommodate all of the people that want to participate.
- increased at-home Jewish observance, discussion of Jewish topics, incorporation of Jewish values, etc. (These are outcomes that are perceived by the educational director. It is hoped that these outcomes will be confirmed by Alan Caro's evaluation.)
- new proposed organizational structure at BAI which has emerged from the educational reorganization of the synagogue: All major committees will meet on the same night as a 'whole group', beginning with a dvar Torah. Then the large group will split up into smaller committees. One of these committees will be a planning group that prepares the synagogue-wide calendar "with the holistic picture in mind".

Title of Synagogue Change Project: Beth Am Israel, Penn Valley, PA: The Design Project: Designing an Education System for Inter-Generational Neshamot

Hunches Re: Factors Linked to "Success"

1) CHARACTERISTICS OF THE SYNAGOGUE:

- leadership with vision and passion
- a quality, caring professional staff
- lay people who are committed "people-people"
- the feeling that this change is a mission and that it is critical to the lives of our children, their parents, and the next generations.
- willingness to take criticism and to believe that nothing is written in stone
- "You must know what you want in order to effect change".

2) CHARACTERISTICS OF THE CHANGE PROCESS:

- allowing people to taste and experience what you want them to intellectually grasp
- "Successful change occurs through *Na'aseh V'nishmah*". You must create facts on the ground and try things on an experimental basis. When you only discuss change or a new idea, people get caught up in the possible negatives and a fear of change, anxiety sets in.
- "You can't do radical surgery": must build on previous change; change is incremental and evolutionary.
- "You must know what you want in order to effect change".

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 1

Title of Synagogue Change Project: Boston's Commission on Jewish Continuity: Sh'arim, Me'ah, and the Youth Educator Initiative

Sponsoring Agency: Boston's Commission on Jewish Continuity (COJC): a joint project of Combined Jewish Philanthropies (federation) and its agencies (including the Bureau of Jewish Education), the Union of American Hebrew Congregations, the United Synagogue of Conservative Judaism, the Council of Orthodox Synagogues, and the Synagogue Council of Massachusetts.

Sh'arim: collaboration of COJC, Bureau of Jewish Education, & Hebrew College.

Me'ah: partnership of COJC & Hebrew College.

Youth Educator Initiative: co-managed by the Bureau of Jewish Education, COJC, and the Synagogue Council of Massachusetts in consultation with the regional youth movements (NCSY, NFTY and USY).

Sources of Data (interviews & written materials):

Interviews:

- Carolyn Keller-3/6/98 & 3/26/98
- Danny Margolis-3/6/98
- Susan Shevitz-3/6/98

Written Materials:

- "All You Ever Wanted to Know About..The Commission on Jewish Continuity"-1998.
- Application: Commission on Jewish Continuity-Sh'arim/Gateways to Jewish Living: The Jewish Family Educator Initiative-1996/1997.
- Application for Institutions: Commission on Jewish Continuity-Me'ah: One Hundred Hours of Adult Jewish Learning-January, 1999.
- Brochure: "Me'ah: One Hundred Hours of Adult Jewish Learning"-1997/1998.
- Bureau of Jewish Education,"Family Education Grants at a Glance", 1998/1999.
- Bureau of Jewish Education, Commission on Jewish Continuity, Synagogue Council of Massachusetts: Youth Educator Initiative: The Youth Agenda: Goals and Stages for Professional and Institutional Development, September, 1997.
- Combined Jewish Philanthropies-Report of the Strategic Planning Committee: A Culture of Learning, A Vision of Justice, A Community of Caring-January, 1998-Shevat 5758.
- Commission on Jewish Continuity, Letter attached to teen program survey, April 30, 1998
- Commission on Jewish Continuity Mission Statement
- Commission on Jewish Continuity, "Sh'arim/Gateways to Jewish Living: The Jewish Family Educator Initiative", March, 1993.
- Commission on Jewish Continuity, "The Youth Educator Initiative", 1998.

- Commission on Jewish Continuity, Combined Jewish Philanthropies, Hebrew College, Me'ah: One Hundred Hours of Adult Jewish Learning: A Report to the Righteous Persons Foundation, November, 1997.
- Me'ah Mission Statement (a work in progress)-January, 1998.
- Shevitz, Susan L., "Sh'arim: Boston Continuity Commission's Family Education Initiative: Overview of the Research and Evaluation Plan"-presentation at the Conference for Research in Jewish Education, Stanford University, June, 1995.
- Shevitz, Susan L., Research Report 2: What Have We Learned: The Projects of CJP's Supplemental School Task Force, 1987-1992, An Evaluation, Bureau of Jewish Education of Greater Boston-1992.
- Shevitz, Susan L. & Karpel, Debbie, Research Report IV-Sh'arim Family Educator Initiative: An Interim Report of Programs and Populations-Bureau of Jewish Education of Greater Boston-Spring, 1995

Address and Phone # For Learning More About This Change Project:

Carolyn Keller (617) 457-8591
 Director of the Commission on Jewish Continuity (COJC)
 126 High Street
 Boston, MA 02110

Sh'arim Contacts: Dr. Harvey Shapiro, Hebrew College Training; Marion Gribetz, BJE Family Educator Network; Ina Regosin, BJE Consultation; Dr. Susan Shevitz, BJE Evaluation Consultant.

Me'ah Contacts: Elyse Hyman, Coordinator; Bernice Lerner, Director of Continuing Education; Rabbi David Starr, Me'ah Academic Director.

Youth Educator Initiative Contact: Billy Mencow, Project Coordinator.

Sponsoring Agency Type:

- national organization
- central education agency
- ☒ federation or continuity commission
- foundation
- movement, movement-affiliated college or other organization
- individual synagogue

Type of Synagogue Change Project:

- planned total synagogue change
- planned total synagogue school change
- ☒ planned change targeted to one aspect of synagogues at a time
- 'organic' unplanned change
- national
- ☒ regional
- one synagogue

Movement affiliation of synagogues involved in this change project:

☒ Trans-denominational
☐ Orthodox
☒ Conservative
☒ Reform
☐ Reconstructionist

of Participating Synagogues:

- Sh'arim: 16 institutions involved, including 13 synagogues
- Me'ah: 13 classes; 17 sites involved, representing 28 institutions, including 22 synagogues
- Youth Educator Initiative: 11 youth educators; 12 institutions involved; all 12 are synagogues (Note: 2 synagogues have one collaborative USY group); expanding to 16 congregations in the fall of 1998.

- 7 synagogues involved in all three initiatives (Sh'arim, Me'ah, & YEI)
- 4 synagogues involved in both Sh'arim & Me'ah
- 1 synagogue involved in both Me'ah & YEI

Names & Characteristics of Participating Synagogues:

(need to get Movements & sizes)

(** synagogue that is involved in 2 initiatives)

(*** synagogue that is involved in 3 initiatives)

Sh'arim

| <u>Name</u> | <u>Location</u> | <u>Size</u> | <u>Movement</u> |
|---|-----------------|-------------|-----------------|
| •Congregation Beth El*** (started in August, 1994) | Sudbury | 400 | Reform |
| •Congregation Eitz Chayim | Cambridge | 130 | unaffiliated |
| •Congregation Mishkan Tefila** (started in August, 1993) | Chestnut Hill | 870 | Conservative |
| •Temple Aliyah*** | Needham | 350 | Conservative |
| •Temple Beth Avodah (started in August, 1994) | Newton | 520 | Reform |
| •Temple Beth Shalom** | Needham | 530 | Reform |
| •Temple Emanuel** (started in August, 1993) | Newton | 1400 | Conservative |
| •Temple Emunah*** (started in August, 1993) | Lexington | 500 | Conservative |
| •Temple Isaiah*** (started in August, 1993) | Lexington | 780 | Reform |
| •Temple Israel** (started in August, 1993) | Boston | 1550 | Reform |
| •Temple Israel*** | Natick | 500 | Conservative |
| •Temple Shalom*** (started in August, 1994) | Newton | 930 | Reform |
| •Temple Shir Tikva*** (started in August, 1993) | Wayland | 350 | Reform |

Me'ah

| <u>Name</u> | <u>Location</u> | <u>Size</u> | <u>Movement</u> |
|--------------------------------|-----------------|-------------|-----------------|
| •Congregation Beth El*** | Sudbury | 400 | Reform |
| •Congregation Beth Elohim | Acton | | unaffiliated |
| •Congregation Kehillath Israel | Brookline | | Conservative |
| •Congregation Mishkan Tefila** | Chestnut Hill | 870 | Conservative |
| •Congregation Or Atid | Wayland | | Conservative |
| •Congregation Sha'arey Shalom | Hingham | | Reform |
| •Temple Aliyah*** | Needham | 350 | Conservative |
| •Temple Beth Am | Framingham | | Reform |
| •Temple Beth Abraham | Canton | | Conservative |
| •Temple Beth David | Canton | | Reform |
| •Temple Beth Elohim | Wellesley | | Reform |
| •Temple Beth Shalom** | Needham | 530 | Reform |
| •Temple Beth Shalom | Framingham | | Conservative |
| •Temple Emanuel** | Newton | 1400 | Conservative |
| •Temple Emunah*** | Lexington | 500 | Conservative |
| •Temple Isaiah*** | Lexington | 780 | Reform |
| •Temple Israel** | Boston | 1550 | Reform |
| •Temple Israel*** | Natick | 500 | Conservative |
| •Temple Israel** | Sharon | | Conservative |
| •Temple Shalom*** | Newton | 930 | Reform |
| •Temple Shir Tikva*** | Wayland | 350 | Reform |
| •Temple Sinai | Sharon | | Reform |

Youth Educator Initiative

| <u>Name</u> | <u>Location</u> | <u>Size</u> | <u>Movement</u> |
|--|-----------------|-------------|-----------------|
| •Ahavath Torah Congregation (in collaboration with Temple Beth Abraham) | | | |
| •Congregation Beth El*** | Sudbury | 400 | Reform |
| •Temple Aliyah*** | Needham | 350 | Conservative |
| •Temple Beth Abraham (in collaboration with Ahavath Torah Congregation) | | | Conservative |
| •Temple Beth Am | Randolph | | |
| •Temple Emunah*** | Lexington | 500 | Conservative |
| •Temple Isaiah*** | Lexington | 780 | Reform |
| •Temple Israel*** | Natick | 500 | Conservative |
| •Temple Israel** | Sharon | | Conservative |
| •Temple Shalom*** | Newton | 930 | Reform |
| •Temple Shir Tikva*** | Wayland | 350 | Reform |
| •Temple Tifereth Israel | Malden | | |

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 2

Title of Synagogue Change Project: Boston's Commission on Jewish Continuity (COJC) : Sh'arim, Me'ah, and the Youth Educator Initiative

Objectives:

Objectives of the Commission on Jewish Continuity:

- to identify a set of workable strategies for strengthening Jewish identity and supporting Jewish continuity
- to identify the communal institutions which can implement the agreed upon strategies, outline appropriate areas of responsibility, and ensure collaboration and coordination in the service of common goals
- to engage the energies and commitment of the significant stakeholders in and potential funders for an expanded vision of Jewish education in the service of Jewish continuity in the Boston community
- to establish mechanisms to provide for implementation and evaluation of the agreed upon strategies and programs

Overall objectives of all 3 initiatives of the Commission on Jewish Continuity:

- to foster positive change in individuals and institutions through the route of Jewish education, thereby ensuring a strong future for the Boston Jewish community

Order of priority:

- 1) community change
- 2) institutional change
- 3) individual/personal change
- 4) professional development
- 5) programmatic innovation

- to ensure Jewish continuity in the Boston community by improving the quality and increasing the visibility of family education, adult education, and youth activities in Greater Boston's Jewish institutions
- to transform Jewish institutions (including synagogues, schools, and JCCs) and Jewish lives through the route of Jewish education
- to get Jewish institutions (including synagogues, schools, and JCCs) to view themselves as lifelong learning institutions that provide educational opportunities for youth, adults, and families
- to enable Jewish institutions (including synagogues, schools, and JCCs) to create vibrant, engaging learning communities by providing financial resources through the federation (Combined Jewish Philanthropies) and professional support through various community agencies (Bureau of Jewish Education, Boston Hebrew College, the Synagogue Council of Massachusetts)
- to provide opportunities for collaboration between synagogues, federation, the federation's constituent agencies, and the movements in the Boston community in order to ensure a strong Jewish future

- to strengthen individuals' Jewish identity (in particular: families participating in family education programs, adult learners, and teenagers participating in Jewish youth activities)
- to foster the professional development of Jewish Family Educators and Youth Educators and to build the profession of family education and youth work
- to foster high quality programmatic innovation in the areas of family education, adult education, and informal youth activities

Objectives of Sh'arim

- ultimate goal: to transform Jewish institutions (primarily synagogues) by enabling them to hire professionally trained Jewish Family Educators
(Note: The objectives of Sh'arim have shifted over the past five years, from a focus on transformation of families to a focus on transformation of institutions.)
- to transform Jewish families:
 - to provide opportunities for families to engage in Jewish learning, culture, social actions, and religious observance
 - to establish organizational contexts & programs for family involvement in Jewish learning
 - to educate adults as well as children
 - to involve family members in their children's Jewish education
 - to enable adults to become Jewish role models for their children
 - to build community among families
 - to have an impact on Jewish families' lives:
 - to transform homes into vibrant Jewish centers of practice and learning
- to train Jewish Family Educators and to provide them with professional support and consultation
- to build the profession of Jewish Family Education

Objectives of Me'ah

- to change the culture of the Boston Jewish community by increasing the status and personal meaning of Jewish learning for Jewish leaders in all institutional settings
- to build a community of active Jewish learners in the Boston area
- to build capacity within Jewish institutions (including synagogues) by increasing the adult Jewish literacy of their lay leaders and professionals
- to transform Jewish institutions (including synagogues) by involving Me'ah participants and graduates as role models and leaders among their membership
- to develop Judaically knowledgeable adults
- to increase the Jewish literacy of Jewish adults in the Boston area
- to deepen participants' Jewish commitment and expand their participation in Jewish life

Me'ah mission statement:

Me'ah will change the culture of our Jewish community, increasing the status and personal meaning of Jewish learning for all Jews in every setting. Me'ah is an intensive program of Jewish study which furnishes adults with a

framework for ongoing study of Jewish texts, philosophy and history, and which is based on the belief that Jewish learning has both personal and communal impact. Communities of learners in pursuit of Jewish literacy are engaged with questions of meaning, further developing their responsibility as individuals, as members of a family, the Jewish community, and the broader world.

Objectives of Youth Educator Initiative:

- to enhance the Boston Jewish community's impact on its youth
- to develop and strengthen the institutional structures and stakeholder teams that design, oversee, and implement Jewish youth programs
- to transform Jewish institutions (primarily synagogues) into places where there is integration between formal and informal educational opportunities for teenagers/pre-teens and where teenagers/pre-teens have a more substantive role within the organization
- to enhance the profession of Youth Educator and the field of Jewish youth work
- to enhance the advocacy for and visibility of Jewish teen programming
- to upgrade the Judaic content of youth programs for pre-teens and teenagers

Description of Change Project (the project's vision of synagogue life & the project's change process/"how it works"):

Common elements in all 3 initiatives:

- 1) professional development or lay leadership development: education and training for lay leaders, Jewish Family Educators, Youth Educators, and other professionals in Jewish institutions
- 2) new and improved programs in Jewish institutions
- 3) new governance structures in Jewish institutions that reflect an integration of educational opportunities and activities for youth, adults, and families

Sh'arim

The COJC provides funding to enable synagogues and other Jewish institutions to hire part-time or full-time professional Jewish Family Educators. Assuming an annual salary of \$35,000 per year, COJC currently funds 50% of the salary of Jewish Family Educators (100% matching grant) who are hired to work at least 20 hours per week, up to a maximum of \$17,500 per year for the first 3 years. In the 4th year and beyond ("Sh'arim Vatikim"), the COJC matches 25-40% of the institution's contributions to the Jewish Family Educator's salary.

Through the sponsorship of the COJC, each institution's Jewish Family Educator receives two years of training at Boston Hebrew College and ongoing professional support and consultation from the Bureau of Jewish Education. As part of his/her course of study, each Jewish Family Educator works with an academic advisor assigned by the program to discuss issues of personal and professional growth. Both during and after the initial two-year training period, all local Jewish Family Educators participate in regular meetings of the BJE Family Educator Network which provides opportunities for the community's family educators to share ideas

and to informally review Jewish Family Education programs. As part of Sh'arim, COJC holds annual community "team events" for professionals and lay leaders involved in Sh'arim which are designed to assess the community's needs and to improve Jewish Family Education programming.

Each participating institution is required to assemble a Jewish Family Education team of lay leaders and professionals to implement the Sh'arim initiative, with each institution developing its own site-specific approach to family education. A BJE staff consultant assists each institution's team design and implement the site-specific Sh'arim family educator and family education plan. Once hired, the Jewish Family Educator joins the institutional team. All institutions are encouraged to provide baseline and ongoing data to an evaluation consultant from the BJE; baseline data includes information about each institution's demographics, programs, budget, and governance structure.

Me'ah

Me'ah is an intensive high-quality program of Jewish study which provides 100 hours of learning over the course of two years to each participating adult. Me'ah furnishes adults with a framework for ongoing study of Jewish texts, philosophy, and history, based on the belief that Jewish learning has both personal and communal impact. Focusing on the "classics" of Jewish textual tradition, conversations in Me'ah classes are generated on a variety of concepts such as God, Torah, Israel, ethics, and ritual. The Me'ah curriculum, which is now ready for publication and dissemination to other communities, represents an integrative, thematic approach to key Jewish concepts as well as a sequential approach through Jewish history.

The curriculum consists of four courses in 2 years: Hebrew Bible and Rabbinics in year 1, Medieval and Modern Jewish Experience in year 2. In year 1, the Bible and rabbinic texts such as Mishnah, Talmud, and Midrash serve as the entry point into serious reflection upon Jewish life. In year 2, an exploration of medieval and modern Jewish history reveals ongoing engagement with sacred texts and the many Jewish responses to external cultures and events. Historical/philosophical discussions and outside readings complement text study. Extracurricular offerings provide other venues for learning and interaction among students and faculty. Upon completion of the program, a Certificate of Completion is awarded; participants may elect to undertake additional course-work and receive a total of 8 Hebrew College undergraduate credits.

Me'ah features outstanding faculty from academic and Jewish educational institutions throughout the Greater Boston area, including Boston Hebrew College, Brandeis University, Harvard University, and Wellesley College. Each Me'ah class is limited to 26 students. Me'ah classes take place at Boston Hebrew College and at 16 other sites in the Greater Boston area, including synagogues and JCC's. Liaisons at each site are encouraged to consider a variety of options for graduates to pursue, including study and community service; Rabbi Barbara Penzner, a COJC consultant,

works with rabbis, educators, and lay leaders at each site to consider how to best create and support the "community of learners" as well as how to serve Me'ah graduates (using a tool entitled "Life After Me'ah"). Rabbi Penzner also works with each institution to encourage more integration of Me'ah participants in all areas of communal life.

Youth Educator Initiative

With guidance from the BJE and the Synagogue Council of Massachusetts, teams of lay and professional leaders at each of the YEI sites work together to develop and implement a comprehensive vision of "the ideal youth community" for that institution that integrates formal studies, youth group activities, Jewish camping, and the Israel experience.

YEI consists of 4 major components:

1) Professional Development of Youth Educators:

YEI Youth Educators participate in professional training modules throughout the year, focused on the areas of Judaic Studies, adolescent development, group work, programming, pedagogy, and organizational development. Youth Educators who have completed the foundation modules are expected to develop an individualized professional growth plan with the assistance of YEI staff.

2) Consultation to Youth Educators and Synagogues:

YEI staff at the BJE consult monthly with each synagogue's YEI team (consisting of the Youth Educator, the Youth Committee Chair, Education Director, Family Educator, Rabbi, and key lay leadership). The BJE's YEI consultants provide expertise in the areas of professional development, program development, and institutional/organizational development within synagogues and other participating sites.

3)Funding:

Grants, like consulting expertise, are provided in the areas of professional development of Youth Educators and institutional/organizational development. COJC provides grants, ranging from \$1,500-\$7,500 per year, based on each congregation's stage of involvement in YEI. Sites involved at the "*aleph* stage" (grants up to \$1,500) commit to the professional development of the Youth Educator, to increase the Judaic content of youth programs, to strengthen the youth committee, and to develop the Youth Educator job description. Sites involved at the "*bet* stage" (grants up to \$5,000) commit to increase the involvement of their Youth Educator in synagogue governance and provide the Youth Educator with opportunities to serve as a synagogue resource for all youth-related issues (including governance and ritual). Sites involved at the "*gimmel* level" (grants up to \$7,500) strive to assume a more active role in regional movement activities, such as hosting a regional event; in these sites, the Youth Educator serves as the primary on-site resource regarding an integrated, year-round Jewish teen experience.

4) Community Team Events:

YEI facilitates annual community events for all who work with teens, including a session with teens to assess their needs from the Jewish community. These events are designed to improve programming and to address teen issues.

History of Change Project (when it started, who started it, etc.):

Under the leadership of Barry Shrage, the President of Combined Jewish Philanthropies (CJP), the Boston Jewish community formed the Commission on Jewish Continuity (COJC) in 1989. As a partnership between the Federation, the BJE, local regional religious movements, and the Synagogue Council of Massachusetts, the COJC was charged with the mandate of identifying strategies for strengthening Jewish identity and supporting Jewish continuity. Under Barry's leadership and the leadership of CJP's strategic planning committee chaired by Henry Rosovsky, a report was published in 1998 which highlights the Boston Jewish community's vision of a "culture of learning", a "vision of justice", and a "community of caring" ("*Torah, tzedek, & hesed*"). The 3 initiatives of the COJC are consistent with CJP's strategic plan and will be expanded as part of this plan.

Sh'arim

The Task Force on Supplemental Jewish Education was formed in Spring, 1985 by CJP as a response to a communal priority identified through the work of its Communal Objectives Committee. Between 1987-1992, CJP allocated \$932,985 for Task Force project that fell into 3 categories: Family Education, Personnel Development, and Research and Evaluation. Sh'arim is an outgrowth of the Task Force on Supplemental Jewish Education's early family education initiatives in 1987-1993. These early family education initiatives included grants to schools for family education programs, consultation, curriculum development, research on the practice of family education, and workshops for practitioners and lay leaders.

Implementation of Sh'arim began in 1993, under the auspices of the Commission on Jewish Continuity. Sh'arim's fourth "team event", facilitated by Sara Lee in 1998, highlighted the initiative's focus on changing institutions as well as families.

Me'ah

The first two Me'ah classes began in September, 1994.

Youth Educator Initiative

YEI was initially piloted in February, 1994; it became a fully developed initiative in 1996.

Synagogue Selection Process (how synagogues were selected to participate):

Sh'arim:

All Jewish institutions in the Greater Boston area that have experimented with forms of family education programming are eligible to apply. To be selected as a Sh'arim site, each institution has to submit an application to the COJC Family

Educator Committee. Institutions should have reached a level of "institutional readiness" (as determined by the BJE consulting staff) which include some of the following indicators:

- experience in team planning
- evidence of creative programming
- experience with family education programming
- parental involvement in program planning
- readiness to accept the obligations that come with participation in the communal process
- readiness to relate to the goals and process of family education (including the formation of a Jewish Family Education team)

Sh'arim site selections are made by a Family Educator Committee, staffed by the Director of the Commission on Jewish Continuity. The committee consists of 6 individuals chosen by the movements (UAHC, USCJ, the Orthodox community, and the Day School Council), and 6 chosen by CJP and its agencies (including the BJE, JCCGB, Hebrew College, Hornstein Program at Brandeis University, and CJP's Jewish Education Subcommittee). The Family Educator's lay chairperson is chosen by the chairs of the Commission in consultation with the Staff Director, the Synagogue Council, and the movements.

Me'ah:

All Jewish institutions in the Greater Boston area are eligible to apply. To be selected as a Me'ah site, each institution (or collaborative of multiple institutions) has to submit an application to Carolyn Keller at the COJC. The following criteria are used to select Me'ah sites:

- Vision: a statement of the role of Me'ah in the institution's overall agenda for Jewish education and a statement of the site's goals for Me'ah and its participants.
- Support: a statement of board support for Me'ah with an understanding of the implications of Me'ah for the site, rabbinica and/or director's leadership in promoting Me'ah, financial commitment by the institution to offset participants' costs and to support extra-curricular expenses
- Planning for Me'ah: provision of suitable space for Me'ah classes, professional liaison on-site during class sessions, plan for individuals and groups to be targeted for invitation to participate, plan for limiting the number admitted to 26, plan for cooperation with other institutions (as needed), program for extra-curricular meetings and activities for Me'ah participants, and appropriate library and educational resources
- Planning for the Post-Me'ah Experience: statement of initial expectations for the future role of Me'ah graduates, development of programs and resources for Me'ah participants and graduates, and designation of professional for "99th hour" interviews in second year.

- having an overall vision of the place of adult learning in the institution
- having a substantial number of adult learners who are looking for a deeper understanding of Judaism

(Note: institutions can collaborate with each other to ensure a class size of 26 students per site)

- having a board which is willing to support Me'ah at the site (commitment to additional professional staff, expanded adult education programming, financial commitments to offset participants' course and book fees and to support extra-curricular programming)
- having a professional staff person or key lay leader who acts as the designated Me'ah liaison (The liaison oversees the administrative workings of the classes, attends from time to time, and helps plan extra-curricular programs.)
- having a comfortable space which is conducive to an atmosphere of learning and discussion
- having "the capacity for creating roles and experiences for Me'ah graduates" in the institution after the completion of the Me'ah course of study

Me'ah site selections are made by the Me'ah Steering Committee, which is staffed by professionals from the COJC and Hebrew College and which is made up of lay and professional leaders who have taken Me'ah classes, worked with the classes, or who have had similar study experiences such as the Wexner Heritage Fellows program. Representatives of the congregational movements, the students, and the faculty of Me'ah also have input into the site selection process.

Youth Educator Initiative

All Jewish institutions (primarily synagogues who already have Youth Educators on staff) in the Greater Boston area are eligible to apply. To be selected as a YEI site, each institution has to submit an application to the COJC Director. The following criteria are used to select YEI sites:

- development of a broad planning agenda for the institution, which is supported by the rabbinic and lay leadership of the congregation
- institutional stability (financial stability and continuity of professional staff and lay leadership)
- commitment to upgrade the hours and visibility of its youth program
- demonstrated commitment to examine and upgrade the Judaic components of its youth activities
- commitment to the growth and enhancement of the profession of Jewish youth work
- willingness to increase its financial support of youth programming
- plans to integrate its youth more meaningfully into the synagogue family
- capacity to provide on-site, professional supervision for Youth Educators
- commitment to establish a working team of lay and professional leaders, representative of various elements of the congregation involved in supporting the youth program

After an extended process of application and readiness assessment, YEI site selections are made by a committee which includes representatives from the COJC, the BJE, the Synagogue Council of Massachusetts, the religious movements, and other related organizations (including the JCCs and Hebrew College).

Role of outside consultants:

Sh'arim: The COJC provides funding for BJE consultants to assist each institution's team prepare for and implement the Sh'arim initiative. Dr. Susan Shevitz, together with BJE Research Consultant Dr. Annette Koren, consult on all aspects of Sh'arim's ongoing research and evaluation.

Me'ah: Rabbi Barbara Penzner, a COJC consultant, works with sites to clarify their vision, develop applications, and to consider how to best serve Me'ah graduates. Rabbi Penzner also works closely with each institution to encourage more integration of Me'ah participants in all areas of communal life.

YEI: YEI staff, jointly hired by the BJE and the Synagogue Council, consult to Youth Educators in the area of professional development and to synagogues in the area of organizational development. YEI staff consult monthly with each synagogue's YEI team (consisting of the Youth Educator, the Youth Committee Chair, Education Director, Family Educator, Rabbi, and key lay leadership). The movements' regional youth directors serve as advisors to the YEI staff. Beginning in 1998/1999, half-time youth consultants funded by COJC will be housed at the UAHC (Union of American Hebrew Congregations) and USCJ (United Synagogue of Conservative Judaism) regional offices to assist the YEI staff at the BJE.

Role of outside organizations:

Boston's Commission on Jewish Continuity (COJC) is structurally a partnership of Combined Jewish Philanthropies (CJP) and its agencies (including the Bureau of Jewish Education), the Union of American Hebrew Congregations, the United Synagogue of Conservative Judaism, the Council of Orthodox Synagogues, and the Synagogue Council of Massachusetts.

Sh'arim:

Boston Hebrew College provides the training for the Jewish Family Educators. The BJE coordinates Sh'arim's evaluation research and the Jewish Family Educator Network and provides intensive consultation and institutional development services to all Sh'arim sites. The COJC coordinates Sh'arim's site-selection process. Sh'arim is considered "Level IV" of the community's current Jewish Family Education initiatives: Level I consists of "prepared" program grants, Level II consists of 2-year planning grants, and Level III consists of expansion grants. While Sh'arim is coordinated by the COJC, the other three levels of Boston's Jewish Family Education program are coordinated by the BJE.

Me'ah:

Boston Hebrew College coordinates most of the academic and curricular aspects of Me'ah. The COJC coordinates the administrative and community-building aspects of Me'ah, including the site-selection process.

Youth Educator Initiative:

Most Youth Educators work in coordination with one of the regional youth movements (BBYO, NCSY, NFTY, USY, or Young Judea); some Youth Educators work in synagogues that have their own independent youth groups. This initiative relies on the strengths and expertise of the regional youth directors, who serve on the YEI Professional Advisory Group as advisors to the YEI staff and who participate in the professional and institutional development aspects of the program. Originally, the Synagogue Council provided consultation and the BJE provided training to the Youth Educators. Now (1997/1998), a YEI project director (Billy Mencow), who was jointly hired by the BJE and the Synagogue Council, provides consultation and training. Next year (1998/1999), the YEI project director's consulting and training services will be supplemented by project staff at each of the regional movement offices (whose salary will be paid by the COJC).

How it is funded:

Sh'arim: The COJC provides funding to enable synagogues and other Jewish institutions to hire part-time or full-time professional Jewish Family Educators. Assuming an annual salary of \$35,000 per year, COJC currently funds 50% of the salary of Jewish Family Educators (100% matching grant) who are hired to work at least 20 hours per week, up to a maximum of \$17,500 per year for the first 3 years. In the 4th year and beyond ("Sh'arim Vatikim"), the COJC matches 25-40% of the institution's contributions to the Jewish Family Educator's salary. In addition, the COJC provides funds to Boston Hebrew College and the Bureau of Jewish Education for training, consultation, and research.

Me'ah: grants from CJP Donor-Advised Funds and the Righteous Persons Foundation.

Unsubsidized annual tuition for Me'ah is \$1,250 per person plus \$50 registration plus approximately \$150 for books. Participants at congregational sites pay approximately \$450-600 per year (depending on the financial support provided by the site). The cost of a Me'ah class is \$20,000 per year per site (1997/1998). The COJC, through CJP Endowment funding subsidizes 50% of these costs, making the cost \$10,000 per site. Additional expense include a \$50 registration fee per student and the cost of books.

Youth Educator Initiative: COJC grants made available through Combined Jewish Philanthropies Endowment funds.

The COJC provides grants, ranging from \$1,500-\$7,500 per year, based on each congregation's stage of involvement in YEI. Sites involved at the "*aleph* stage" commit to the professional development of the Youth Educator, to increase the Judaic content of youth programs, to strengthen the youth committee, and to develop the Youth Educator job description. Sites involved in the "*bet* stage" commit to increase the involvement of their Youth Educator in synagogue governance and provide the Youth Educator with opportunities to serve as a synagogue resource for all youth-related issues (including governance and ritual). Sites involved at the "*gimmel* level" strive to assume a more active role in regional movement activities, such as hosting a regional event; in these sites, the Youth

Educator serves as the primary on-site resource regarding an integrated, year-round Jewish teen experience.

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 3

Title of Synagogue Change Project: Boston's Commission on Jewish Continuity: Sh'arim, Me'ah, and the Youth Educator Initiative

Definitions of "Success":

Definitions of Success across all 3 initiatives:

- synagogues articulating visions of what they are as congregations and asking themselves strategic questions such as, "What are we here for?"
- synagogues seeing themselves as lifelong learning institutions that provide formal and informal education for people of different ages across generational lines (youth, adults, and families)
- synagogues implementing creative programs that reflect their vision
- synagogues experimenting with new (or 'improved') professional staff positions and improved educational programs for youth, adults, and families
- synagogues experimenting with new lay and professional staff roles and relationships that reflect more integration and collaboration between and among lay leaders and professional staff
- synagogues changing their governance structures in ways that reflect their new self-perception as lifelong learning institutions (with an integration of the governance structures for youth, adult, and family education): synagogues' governance structures being comprised of collaborative teams of stakeholders who represent different developmental stages (youth, adults, and families)

Sh'arim

- synagogues increasing the quantity and improving the quality of Jewish Family Education programs
 - synagogues truly "buying in" to Jewish Family Education, as reflected in their personnel, programs, policies, procedures, governance patterns, and general orientation as a family-friendly community
- (examples: instituting a family education committee, providing nametags at events to promote a sense of community, having a full-time Jewish Family Educator on staff, having membership policies that encourage families to join)

Me'ah

- increase in number of students enrolled from year to year
- increase in number of sites applying to be selected as Me'ah sites
- extent to which Me'ah is well-known and well-reputed throughout the Greater Boston community
- student satisfaction with the curriculum and faculty
- improved adult Jewish literacy: cognitive knowledge
- involvement of Me'ah students and graduates in the life of the host institution
- involvement of Me'ah students and graduates in Jewish communal life

Youth Educator Initiative

- better trained personnel in the field of youth work
- increased time for professional youth staff, with a concrete goal of 10 full-time youth directors by the the year 2003
- expanded pre-teen and teen programming in synagogues
- improved pre-teen and teen programming with upgraded Jewish content
- high advocacy for and visibility of Jewish teen programming in synagogues and in the Boston community at large
- synagogues exhibiting a greater understanding of the importance of Jewish youth programs and youth educators in congregations
- synagogues instituting new governance structures that design, oversee, and implement Jewish youth programs
- synagogues being transformed into institutions where there is integration between formal and informal educational opportunities for teenagers/pre-teens and where teenagers/pre-teens have a more substantive role within the organization
- coordination of Jewish youth activities with Jewish camping and the Israel experience
- more teenagers/pre-teens involved in Jewish activities for longer time periods

Title of Synagogue Change Project: Boston's Commission on Jewish Continuity: Sh'arim, Me'ah, and the Youth Educator Initiative

Perceived Outcomes to Date ("What's Happening?"):

Sh'arim

1) IMPLEMENTATION:

- Some perceived outcomes outlined in Shevitz and Karpel's Research Report IV: Sh'arim Family Educator Initiative: An Interim Report of Programs and Populations (Spring, 1995)-data collected from 13 out of the 14 Sh'arim sites between August, 1994 and February, 1995:

- Approximately 220 family education programs were implemented in 13 sites (including 10 synagogues) over a six month period.

- Some sites offered primarily multi-session-series Jewish Family Education programs, while others tended to offer more single-session workshops or classes. Approximately 3,400 individuals attended multi-session family education programs and approximately 4,200 individuals attended single-session programs over a six month period.

- Shabbat, holidays, Torah, and Tefilah were the content areas most frequently found as family education program themes.

- All Sh'arim sites had family education teams and/or committees. However, most institutions' teams were not generally "working teams". In some cases, teams were entirely comprised of the site's professional staff. In other cases, teams had both professional and lay members. Family education committees were generally lay committees staffed by the family educator.

- Not all sites were equally focused on building internal institutional support for Jewish Family Education among lay leaders. In some sites, committee rarely met and the work was handled almost exclusively by the professional staff. In a few other sites, committees met sporadically and did not have a clear sense of their role.

2) IMPACT:

- Sh'arim has changed "the way many synagogues do business", expanding its educational offerings beyond classes for children in the religious school to formal and informal programs for adults and families.

- Note: More recent information is being collected in a BJE database by Dr. Annette Koren.

- Note: A longitudinal study is currently being conducted, with data being collected from family education program participants at all Sh'arim sites.

Me'ah

1) IMPLEMENTATION:

- The following chart reflects the growth of Me'ah since its inception:

| <u>1994/1995</u> | <u>1995/1996</u> | <u>1996/1997</u> | <u>1997/1998</u> |
|------------------|------------------|------------------|------------------|
| 2 classes | 4 classes | 8 classes | 14 classes |
| 50 student | 98 students | 198 students | 350 students |
| 3 instructors | 5 instructors | 16 instructors | 20 instructors |

•In response to "the enormous thirst for Torah study", Me'ah expanded from 1 site in 1994/1995 to 17 sites (including collaborations) in 1998/1999.

2) IMPACT:

• According to one interviewee, "Me'ah is so pervasive and well-known throughout the Greater Boston area that it would be difficult to find an involved Jewish person in the community who is not a Me'ah student or graduate or who doesn't know of someone else who is a Me'ah student or graduate. Almost everyone has heard of Me'ah in the Boston community".

•Me'ah has such a great reputation in the community that many people are claiming that it was their idea.

•Many students claimed that "the power of the text" transformed their lives.

•According to the November, 1997 report to the Righteous Persons Foundation, "Me'ah is a powerful tool for institutional change". Not only does Me'ah target congregations where it can potentially have the most impact (based on the selection criteria listed in a previous section), but a Me'ah consultant works with each institution site to encourage more integration of Me'ah participants in all areas of communal life.

YEI:

1) IMPLEMENTATION:

•"trained" youth educators participate in a network

2) IMPACT:

•number of full-time Jewish youth workers in the Greater Boston community has doubled (from 2 to 4 full-time youth workers), with the addition of two new "High School/Youth Educator" positions

•greater cooperation and coordination among youth staff in the community

•greater visibility of the "youth agenda" throughout the Greater Boston community:

-expansion of YEI to 16 sites in the fall of 1998

-establishment of the Teen Task Force by the Jewish Community Centers of Greater Boston

- establishment of two new Jewish day high schools (New Jewish High School and Bais Yaakov for Girls)
- expansion of CJP's Myra and Robert Kraft Passport to Israel Program to 37 congregations
- establishment and continuation of Genesis Summer Program at Brandeis University
- participation of 23 local teens in *Panim el Panim*, the social justice program for teens in Washington, DC
- implementation of Brandeis University's research project to study identity issues among 1,200 Boston Jewish youth

Title of Synagogue Change Project: Boston's Commission on Jewish Continuity: Sh'arim, Me'ah, and the Youth Educator Initiative

Hunches Re: Factors Linked to "Success":

GENERAL COMMENTS ABOUT FACTORS LINKED TO SUCCESS:

• "Each of these three projects requires different pre-existing conditions and different strategies. If the goal is to change the whole institution, this will require yet a different set of strategies.....Because these three projects are so different from each other, there are different means of institutionalizing each of them.....If Boston's three projects are like three different "trees", a synagogue change project that seeks to change the whole institution is like a "forest". If each of the "trees" require different strategies to facilitate success, then certainly the "forest" will require yet a different strategy and set of pre-existing conditions."

• "I don't take as a given that there is much synagogue change going on... We're still in the first 3 or 4 years... Hawthorne effect...lots of "rah rah"..But.. show me in 5 years if JFE is still there. Is it institutionalized? Is it in the form that was originally envisioned?... Have governance structures been improved?"

1) CHARACTERISTICS OF SYNAGOGUES:

•being an organization that can learn from itself re: "what it is doing and how it is doing it" (Senge, Argyris)

•being an organization that has adopted an "experimental stance" (a willingness to try out new ideas)

•leadership

•having synagogue leaders who are resilient and who understand that change is not necessarily so straightforward

•having alliances between professionals and lay leaders

•buy-in of lay leaders

•open lines of communication

•optimism: a "can-do" attitude

• resources (people, time, energy, money)

- a flatter hierarchical structure may be more conducive to change (but this may not be possible in all institutions)
- an organization that has a sense of what it wants to look like (not necessarily a concrete vision)
- synagogues need to think in terms of vision and advocate for that vision
- synagogues need to ask themselves "what are we here for?", to articulate a vision (what they are as a congregation) & to create programs that reflect who they are
- synagogues need to see themselves as lifelong learning institutions
(Is this an "end" or a "means to an end"? Is this a goal of these change projects or is it a factor that contributes to the achievement of some greater goal?)

2) CHARACTERISTICS OF THE CHANGE PROCESS:

- balance between having a "centralized idea" and site-specific ways to implement the idea
- need to give the synagogues latitude to experiment with programs for family, youth, and adults
(Continuity Commission gives a partially articulated program product, but leaves a lot up to the individual synagogues; e.g.) Commission doesn't tell synagogues exactly how JFE should look in their sites; not a cookie-cutter approach: opportunities for synagogues to individualize)
- confidence-building experiences
- learning by actual experimentation
(experimentation mode and learning together has created new structures)
- reflective process (but this can only be done at certain institutions)
- "It doesn't matter who drives it... as long as there is a contagion"
- teams of lay leaders and professionals so that no one owns the agenda exclusively (but this may not work in all institutions)
- "collaborative efforts" between professionals (frequent collaborative meetings) from the Commission, CJP, BJE, and the Movements: "That's what makes it work" because "the collaborative nature of it makes everyone want to get on board"; This is especially important for the Youth Educator Initiative
- interfacing with larger national & Movement partners
- consultative support provided by the Commission and BJE
- training/professional development

- networking opportunities for family educators and youth workers
- money provided by the Commission to fund staff positions, consultation, etc.
- resource slack (time, energy, \$)
("By 'giving' new professionals to institutions, Sh'arim and YEI may be creating this available human resource slack")
- links between change projects
- having an overall comprehensive understanding of the institution as a whole and how different 'piecemeal' projects relate to each other within the organization (including how different initiatives' teams and committees should interact with each other)
- linkages between the synagogue's project and what's going on in the wider community
- "manipulation of symbols"; good packaging: You can do radically different things, but these things wouldn't be noticeable unless they are packaged well
(symbolic representation of what you're trying to do)
- good research to help the COJC staff and agencies think about important issues
- not necessary to implement a synagogue-wide change process with a philosophy of "change one congregation at a time with one consultant per synagogue"

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 1

Title of Synagogue Change Project: Cooperating Schools Network (CSN)

Sponsoring Agency: JRF (Jewish Reconstructionist Federation)
(used to be called FRCH-Federation of Reconstructionist Congregations & Havurot)

Sources of Data (interviews & written materials):

Interviews:

Rabbi Jeffrey Schein, Ph.D.-2/23/98

Written Materials:

- Schein, Dr. Jeffrey, "Dor Hadash and The JRF Cooperating School Network: A Work in Progress", February 20-22, 1998, 25-27 Shevat 5758
- Schein, Jeffrey, "Paradigm Shifts and Other Emerging Conventional Wisdoms in Jewish Education", in Journal of Jewish Education, Volume 63, Number 3, Fall, 1997.
- Schein, Dr. Jeffrey and Isaacs, Dr. Leora, "JRF Covenant Grant Final Evaluation"- April 1996, Iyar, 5756
- Visioning in the Cooperating Schools Network of the Jewish Reconstructionist Federation

Address and Phone # For Learning More About This Change Project:

Rabbi Jeffrey Schein, Ph.D.-National Education Director of JRF-(216) 464-4050

Cleveland College of Jewish Studies
26500 Shaker Boulevard
Beachwood, OH 44122

Sponsoring Agency Type:

- national organization
- central education agency
- federation or continuity commission
- foundation
- _x_ movement, movement-affiliated college or other organization
- individual synagogue

Type of Synagogue Change Project:

- planned total synagogue change
- _x_ planned total synagogue school change
- planned change targeted to one aspect of synagogues at a time
- 'organic' unplanned change

- _x_ national
- regional
- one synagogue

Movement affiliation of synagogues involved in this change project:

- Trans-denominational
- Orthodox
- Conservative
- Reform
- x Reconstructionist

of Participating Synagogues: 21 (out of 96 total synagogues and *havurot* in the Reconstructionist Movement). In 1993, 8 congregations constituted the CSN. Between 1994-1997, an additional 13 congregations joined the network.

Names & Characteristics of Participating Synagogues:

| <u>Name</u> | <u>Location</u> | <u>Size</u> |
|--|-----------------------|-------------|
| Adat Shalom | Rockville, MD | 220 members |
| Bet Haverim | Atlanta, GA | 150 members |
| B'nai Havurah | Denver, CO | 220 members |
| B'nai Keshet | Montclair, NJ | 260 members |
| Congregation Beth Shalom | Naperville, IL | 260 members |
| Congregation Dor Hadash | San Diego, CA | 160 members |
| Congregation Mishkan Torah | Greenbelt, MD | 400 members |
| Congregation Oseh Shalom | Laurel, MD | 450 members |
| Dorshei Tzedek | West Newton, MA | 100 members |
| Jewish Reconstructionist Congregation | Evanston, IL | 650 members |
| Kehillat Israel | Pacific Palisades, CA | 500 members |
| Kehillat Israel | East Lansing, MI | 130 members |
| Mishkan Shalom | Philadelphia, PA | 270 members |
| Or Hadash | Fort Washington, PA | 220 members |
| Ottawa Reconstructionist Havurah | Ottawa, ONT Canada | 65 members |
| Ramat Shalom Synagogue | Plantation, FL | 400 members |
| Reconstructionist Synagogue of North Shore | Plandome, NY | 280 members |
| Shir Hadash | Deerfield, IL | 100 members |
| Temple Beth Shalom | Mechanicsburg, PA | 160 members |
| University Synagogue | Irvine, CA | 400 members |
| West End Synagogue | New York, NY | 250 members |

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 2

Title of Synagogue Change Project: Cooperating Schools Network (CSN)

Objectives of Project:

Overall Objectives: to provide opportunities for Reconstructionist congregations to develop expertise in a particular "value of spiritual peoplehood" and to become a model of educational innovation that shares the "fruits of its experimentation" with other Reconstructionist congregations.

Specific Goals of the Cooperating Schools Network:

- 1) to change synagogue members' conceptions of Jewish education so that they (we) see it as a process of "education" and not just "schooling"
- 2) to provide symbolic legitimation to children's learning by drawing parents into the educational system
- 3) to help teachers work with families as well as children
- 4) to create a desire among adults for further Jewish learning
- 5) to empower families to engage independently in sustaining old Jewish traditions and creating new ones
- 6) to create "ripples" in the school community that will enrich the learning and celebration of the entire congregation
- 7) to develop or renew the resources for educational leadership within the congregation
- 8) to create Jewish bonds between the families participating in the project
- 9) to change the perception of who is a Jewish educator (e.g. parents are teachers too)
- 10) to develop a deeper appreciation for the Reconstructionist approach to sustaining Jewish values and tradition

Description of Change Project (the project's vision of synagogue life & the project's change process/"how it works"):

Underlying Assumptions: In striving to improve Jewish education in synagogues, we need to pay attention to both the form and content of Jewish education. The advocated form of Jewish education is an intergenerational learning community that integrates family, child, and adult education. The advocated content of Jewish education is the Reconstructionist Movement's set of "values of spiritual peoplehood". Jewish education needs to be rooted in spiritual and Jewish purpose.

Vision of Synagogue Life: an intergenerational learning community with integrated education for children, adults, and families that incorporates one or more of the following "values of spiritual peoplehood":

- Kedusha/Spirituality
- Hidur Mitzvah/Jewish Arts
- Tikun Olam/Moral Education
- Hebrew Language
- Tzionut/Zionism & Israel

General Description of Change Project: Participating Reconstructionist synagogues are each asked to select one particular "value of spiritual peoplehood". The selected "value" serves as a "spiritual compass" for the congregation and a thematic area of educational emphasis for the synagogue's intergenerational educational activities. Each participating synagogue is given a decision-making packet that provides "portraits of potentiality" which are sketches of schools trying to actualize their educational potential around one of the "values of spiritual peoplehood". Most of the decision-making for each synagogue's CSN committee during the first year is organized around the selected "value" and the accompanying "portrait of potentiality".

Components of Change Process:

- annual conference with members of all participating synagogues' CSN committees
- several phone conversations and an initial site visit by Jeffrey Schein during which he meets with the synagogue's CSN committee to get a visioning process underway that is focused around one of the "values of spiritual peoplehood"
- 2 visioning exercises for synagogue's CSN committee to do alone (without Jeff)
- meetings between Jeff and each synagogue's CSN committee to discuss next steps
- development of new curriculum materials and/or implementation of existing curriculum materials that are thematically based on one of the "values of spiritual peoplehood"

History of Change Project (when it started, who started it, etc.):

The idea first emerged in 1989, based on discussions of the Education Commission of the Federation of Reconstructionist Congregations and Havurot (FRCH). In 1990, at around the same time that the CSN was being put in place, B'nai Keshet of Montclair (NJ) received a grant from Metrowest Federation to begin developing an intergenerational integrated curriculum based on the values of spiritual peoplehood. FRCH congregations and havurot were invited to join the CSN in the spring of 1992. The first group of 8 CSN congregations attended an informal meeting at Kehillat Israel in the Pacific Palisades in the summer of 1992. After receiving a grant from the Covenant Foundation, the CSN project got underway in participating congregations in the spring of 1993. Jeff Schein was involved in the initial discussions and grant proposals and is currently the primary consultant to individual congregations in the network. According to Jeff, "In many ways, this is the most significant ongoing educational project I have ever undertaken".

Synagogue Selection Process (how synagogues were selected to participate):

open to all 96 Reconstructionist congregations and havurot that are interested in participating; "not heavy on the upfront demands and pre-requisites"

Role of outside consultants: The primary liaison to synagogues' CSN committees is Rabbi Jeffrey Schein, Ph.D. who is the National Director of Jewish Education for the Jewish Reconstructionist Federation (JRF). JRF has recently hired Meryl Wassner of

Chicago, a former principal in the CSN, as the Assistant Director of CSN. In the future, Jeff would like to add some 'educational networkers' at the regional level, as well.

Role of outside organization: JRF provides written materials and consulting advice to each participating congregation.

How it is funded: JRF absorbs the cost of Dr. Schein's time as well as the cost of general administration of the Cooperating Schools Network. A grant from the Covenant Foundation provided funding for the first two national meetings of the network and for the printing of the CSN curriculum. Some individual congregations' projects have been funded by grants from foundation and local federations such as the New Jersey Metrowest Federation. A CSN intern's salary was funded by a grant from the Bronfman Foundation. Each congregation commits to funding a representative who attends the annual CSN meeting.

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 3

Title of Synagogue Change Project: Cooperating Schools Network (CSN)

Definitions of "Success":

- rabbis, educators, and lay leaders planning and thinking differently about education in their congregations:

looking for intergenerational opportunities which take into account children, adults, and families when planning educational programs

- the continuation and expansion of the CSN by the JRF

- extent to which participating congregations are achieving each of the 10 specific goals of the network:

- 1) to change synagogue members' conceptions of Jewish education so that they (we) see it as a process of "education" and not just "schooling"

- 2) to provide symbolic legitimation to children's learning by drawing parents into the educational system

- 3) to help teachers work with families as well as children

- 4) to create a desire among adults for further Jewish learning

- 5) to empower families to engage independently in sustaining old Jewish traditions and creating new ones

- 6) to create "ripples" in the school community that will enrich the learning and celebration of the entire congregation

- 7) to develop or renew the resources for educational leadership within the congregation

- 8) to create Jewish bonds between the families participating in the project

- 9) to change the perception of who is a Jewish educator (e.g. parents are teachers too)

- 10) to develop a deeper appreciation for the Reconstructionist approach to sustaining Jewish values and tradition

Title of Synagogue Change Project: Cooperating Schools Network (CSN)

Perceived Outcomes to Date ("What's Happening?"):

1) IMPLEMENTATION:

2) IMPACT:

- CSN has given congregations a vocabulary and a framework for planning intergenerational educational activities.
 - The CSN process has added dignity to educators' work.
 - Some rabbis have felt excluded when they were not involved in the original steps of the CSN planning process.
 - The first set of participating congregations wrote some outstanding curriculum materials which have since been shared with other congregations.
 - Significant written materials emerged from the work of the network, including Targilon: A Workbook for Charting the Course of Jewish Family Education, Windows on the Jewish Soul: Resources for Teaching the Values of Spiritual Peoplehood, A Parents' and Educators' Guide to God's Paintbrush, Connecting Prayer and Spirituality: Utilizing Kol Nareshamah as a Creative Teaching and Learning Tool.
 - The continuation of the CSN has been assured by JRF leadership. Though the funding is quite modest, the CSN continues to expand.
 - CSN has raised the profile of Jewish education in the Reconstructionist Movement.
 - The ripple effect of JRF's focus on Jewish education has reached the other branches of the Reconstructionist movement, including the Reconstructionist Rabbinical College (whose curriculum has placed a renewed emphasis on Jewish education), and the Reconstructionist Rabbinical Association (which worked with JESNA to focus its 1997 convention on Jewish education).
 - The philosophy of the CSN has influenced the way the JRF thinks about Jewish education (as something that is not just "for die kinder", but that is for adults as well as for children).
-

Impact outcomes detailed in Jeffrey Schein and Leora Isaacs' 1996 evaluation of the CSN (based on responses to 158 surveys from 5 congregations, focus groups in 2 congregations, interviews with 9 professionals in 7 congregations, interviews with lay leaders and professionals in 3 congregations, review and analysis of CSN written documentation, and periodic discussions with the project director):

Effects on individuals (professionals, parents, and children):

- Individual professional felt they had achieved varying levels of success in implementing the CSN model of Jewish family education.
- CSN provided the Reconstructionist movement with a mechanism for developing and disseminating educational resources.

- Individual professionals felt that published curriculum units still needed refinement, such as suggestions for "spiraling" from one day to the next or integration of "family days" with what was going on in children's "regular" classes.

- Participants and professionals agreed that one of the most noteworthy outcomes of the program was the sense of connection and community forged among participants.

- Participants and professionals agreed that participation in the programs was linked to increased activism and involvement in other congregational activities.

- Many parents changed their attitudes about the religious school, religious school education in general, and what their children were learning.

- Home observance was perceived to be least affected by participation in the programs.

- In at least one setting, one negative effect of participation was to make children less satisfied with the "regular" school program.

- Most children responded positively to their parents' involvement.

- Many programs enhanced participants' Jewish content knowledge

- Many programs enriched communication between parents and children by obligating parents and children to spend much more serious time learning, thinking about, and doing Jewish things together.

Effects on participating congregations:

- CSN effected and was affected by professional staffing issues:

Grants enabled some congregations to create Jewish Family Educator positions who facilitated the implementation of CSN programs.

- While engaging a professional Jewish Family Educator allowed one individual to take primary responsibility for the program (which enhanced the quality and smooth operation of the program in most cases), it initially resulted in a lack of collaboration between the family educator, the school educator, the rabbi, and the teachers.

- In congregations where the educational director functioned as a Jewish family educator, the educators often felt frustrated at their not having the time or resources to implement CSN programs in the manner they would have liked. Almost all of these educators noted that they had to neglect something else in order to plan and conduct the family education programs.

- In all congregations, there was a perception that there was a connection between CSN program participation and involvement in other aspects of congregational life.

- The impact of the CSN was mitigated by other events in the congregation's life, in large part due to the small size of the participating congregations.

- Many congregational leaders and board members became knowledgeable advocates for CSN because of their first-hand experience in CSN programs as participants.

- None of the congregations interviewed had established Jewish family education lay task forces or committees even though the project director strongly advocated for them. In all cases, the programs were planned and implemented primarily by

professionals. Most professionals acknowledged the need for a specific Family Education Task Force.

- In many places, participants and professionals felt that there was minimal awareness of impact on the part of the congregants at large. A notable exception was B'nai Keshet, where the program had been in effect for a longer time period and where there was a strong sentiment that the CSN vision had begun to permeate the culture of the congregation.

Title of Synagogue Change Project: Cooperating Schools Network (CSN)

Hunches Re: Factors Linked to "Success":

1) CHARACTERISTICS OF SYNAGOGUES:

- some synagogues are in a "states of readiness" more than others; still hard pressed to define what "readiness" means
(stumbling block to change: absence of readiness)
- need at least one person who is your idea champion
- rabbi's role (" I think the rabbi needs to be on board")

2) CHARACTERISTICS OF THE CHANGE PROCESS:

- need to give people a chance to experience a different form of Jewish education & to "dwell in a '*mikdash me-at*'" as a prelude to structural reform; to show that it is worth making changes
- "Unless you have a clear additive philosophy of how change will take place, you can wear your rabbis and educators to the ground with too many initiatives"
- need to prioritize initiatives (if there are multiple initiatives being implemented in the congregation) "or else you can lose your focus on the bigger picture"
- need to sell the CSN to congregations

Title of Synagogue Change Project: Cooperating Schools Network (CSN)

Hunches Re: Factors Linked to "Success":

From "JRF Covenant Grant Final Evaluation"- by Jeffrey Schein and Leora Isaacs-April, 1996: Factors linked to success of CSN in synagogues:

1) CHARACTERISTICS OF THE SYNAGOGUE:

- leadership support from either the rabbi or educator or a lay person (or all three) (One rabbi worked in 2 different congregations, and CSN 'worked better' in one synagogue because the educator helped the task force both maintain and perform)

2) CHARACTERISTICS OF THE CHANGE PROCESS:

- shortening the "shadow" between the initial enthusiasm generated in a group setting (in San Antonio, before CAJE 17) and the later follow-through: through increased staff time and attention to ongoing communication within the CSN (had a Bronfman Fellow for this purpose-who devoted 20 hrs. per week to the CSN); conference calls between participating congregations working on the same Jewish value or in the same geographic area

- including rabbis in the planning: not just as symbolic advocates for Jewish learning, but also involved in thinking about their work with families and adults

- institutional memory & how deeply awareness of the (change) project has spread throughout the system (These are required for the project to last even after professional staff members leave the synagogue)

- curriculum: "good education is good education": "The same educational care, judgment, and creativity that guides our best teachers with kids needs to be similarly present for adults and families"

- curriculum: "a greater role for texts"

- vision: "it comes from many angles": According to Michael Fullan, vision-building does not follow a linear "ready, aim, fire" model; instead we need to find ways to productively "ready, fire, aim", at least in the beginning stages. (Note: In Fall 1997 article in Journal of Jewish Education: Two conventional wisdoms that Jeff Schein challenges are: "Vision and goal-setting are critical elements by which a congregation or community can fulfill its educational potential" and "Integral to any worthwhile vision is the primacy of education over schooling". How CSN's approach differs from the "vision thing" in Jewish education: "Practically, we are certain that creating new visions for Judaism and Jewish education-however it might embrace a dynamic understanding of Jewish

life-will weary the very best of visioning committees. Jewishly, we believe that our own work in the Reconstructionist movement of the past decade evolving a guiding educational philosophy of "spiritual peoplehood" grounded our whole process. Educationally, we believe that our emphasis on a single lens of a Jewish value promotes what Leroi Daniels has described as the "noticing function" of educational innovation that is more fundamental than either the action or planning modes of most models of educational visioning and research" (pp. 6-7))

- "integrating mediocrity with more mediocrity leads to mediocrity": not sufficient to just have as a goal "integrating adult, family, and child-oriented Jewish education"; focus has to be on integrating high quality education

- "Godzilla vs. King Kong": Often, interactions between different Jewish education pilot programs create synergy. However, sometimes, multiple initiatives do not mesh easily and actually conflict with each other. Any change process must set priorities so that multiple initiatives create synergies instead of conflicting with each other.

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MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 1

Title of Synagogue Change Project: Designated School Program (DSP)

Sponsoring Agency: Auerbach Central Agency for Jewish Education-Philadelphia

Address and Phone # For Learning More About This Change Project:

Helene Tigay-Executive Director- (215) 635-8940 phone (215) 635-8946 fax

Auerbach Central Agency for Jewish Education
Mandell Education Campus
7607 Old York Road
Melrose Park, PA 19027

Sources of Data (interviews & written materials) :

Interviews:

- Helene Tigay-Executive Director of Auerbach Central Agency for Jewish Education & Director of Designated School Program - 2/26/98
- Jane Tausig-Consultant on Educational Leadership & Organizational Development-2/26/98

Written Materials:

- Auerbach Central Agency for Jewish Education-Designated School Program - Spring, 1995

Sponsoring Agency Type:

- ☐ national organization
- ☒ central education agency
- ☐ federation or continuity commission
- ☐ foundation
- ☐ movement, movement-affiliated college or other organization
- ☐ individual synagogue

Type of Synagogue Change Project:

- ☐ planned total synagogue change
 - ☒ planned total synagogue school change
 - ☐ planned change targeted to one aspect of synagogues at a time
 - ☐ 'organic' unplanned change
-
- ☐ national
 - ☒ regional
 - ☐ one synagogue

Movement affiliation of synagogues involved in this change project:

☒ Trans-denominational
☐ Orthodox
☒ Conservative
☒ Reform
☐ Reconstructionist

of Participating Synagogues: 28 out of 52 in the Philadelphia area

In the project's first year (1994): 5 synagogues participated

Currently: 3 "active" synagogues

Names & Characteristics of Participating Synagogues:

(waiting to get written materials)

| <u>Name</u> | <u>Location</u> | <u>Size</u> | <u>Movement</u> |
|-------------|-----------------|-------------|-----------------|
|-------------|-----------------|-------------|-----------------|

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 2

Title of Synagogue Change Project: Designated School Program (DSP)

Objectives of Project:

- to create a better synagogue school with more effective learning by adopting a systems approach to organizations
- ultimate goal: educational change in the synagogue

Description of Change Project (the project's vision of synagogue life & the project's change process/"how It works"):

Underlying theories: A systems model of organizations underlies the change process: "The whole is greater than the sum of its parts". Each group in the synagogue contributes towards the synagogue's overall educational mission.

Comprehensive 3 year change process including the following components:

- 1) adopting a systems orientation, with an emphasis on partnership and role modeling the collaborative effort
- 2) creating a steering committee ("the engine that drives this") within each synagogue, comprised of the rabbi, cantor, executive director, educator, and lay representatives of different constituencies in the synagogue.

The steering committee develops the school's vision and mission, and writes job descriptions. This committee meets monthly with Jane Tausig.

- 3) empowering the school committee by making them more of a process-oriented, goal-setting, and decision-making group that 'macro-manages' instead of 'micro-manages' the school

Synagogues can opt to participate in the 3-year intensive consulting intervention, or they can opt to participate in pieces of the program (e.g. restructuring the school committee in a way that is consistent with systems behavior theory or adopting a systems-based approach to teacher training)

History of Change Project (when it started, who started it, etc.):

1998 is the project's 5th year

Synagogue Selection Process (how synagogues were selected to participate):

Every one of Philadelphia's 52 synagogues is eligible to participate.

Role of outside consultants:

Jane Tausig, the Central Agency's Consultant on Educational Leadership and Organizational Development, works with each synagogue. She gives workshops and seminars, and meets monthly with each synagogue's steering committee. At these monthly meetings, Jane helps the committee members advance to the next task (e.g. Jane helps steering committee make necessary preparations for interviewing synagogue lay leaders and professionals about their perceived roles in the organization). Another consultant, Rochelle Rabeeya, also works as a point

person with schools. The Central Agency's Family Education Consultant is active in the development of the school's family education curriculum and program. Additionally, the Central Agency's Teacher Trainer Consultant works with each school's educational staff to ensure that the school is functioning as an integrated whole. Helene Tigay, the Central Agency's Executive Director, conducts ACAJE Designated School Program team meetings (in which all participating synagogues' DSP teams meet together) approximately once every two weeks.

Role of outside organization:

Central Agency consultants work with synagogue's steering committee on a regular basis.

How it is funded: Federation funds 90% of the operating budget; no costs to synagogues.

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 3

Title of Synagogue Change Project: Designated School Program (DSP)

Definitions of "Success":

- the quality of the school climate
(successful if relationships are better and there is more interaction between staff members)
- "People working together in a coordinated and cooperating way makes all the difference"... "If you have the rabbi and other staff and lay leaders working together in the same direction, then you get synergy"
- "We are in the process of redefining our outcome variables. After all, we are ultimately interested in "improved education". If everyone is just talking to each other and there is improved communication, but the educational system is not improved, I would not be happy. These are just sub-goals to the ultimate goal of educational change":
 - improved education in the school and synagogue
 - a better school
 - more effective learning in the synagogue school

Title of Synagogue Change Project: Designated School Program (DSP)

Perceived Outcomes to Date ("What's Happening?"):

1) IMPLEMENTATION:

Process was revised, once we realized that we could not expect lay leaders to do certain tasks without more direction.

2) IMPACT:

Title of Synagogue Change Project: Designated School Program (DSP)

Hunches Re: Factors Linked to "Success":

1) CHARACTERISTICS OF SYNAGOGUES:

- need people who are committed to the process
- need commitment by participants that Jewish education is central (or else this kind of change won't happen)
- For real change to happen, you have to have the synagogue power centers' buy-in. The school alone is not a power center. The power of change is not within the purview of the Education Director.
- There must be someone or someones who are meshuga ladavar-At the outset, we assumed that the rabbi had to be meshuga ladavar but we learned tht he/she just had to be reasonably supportive. This is a question that I'd like to think more about.

2) CHARACTERISTICS OF THE CHANGE PROCESS:

- need an outside objective facilitator (can't always see yourself clearly from within)
- "Successful change, from our experience, can't be judged from the outset. What we've learned is that "you never know" and surprises are the name of the game.

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 1

Title of Synagogue Change Project: Experiment in Congregational Education (ECE)

Sponsoring Agency: HUC-JIR's Rhea Hirsch School of Education in cooperation with the UAHC Commission on Jewish Education

Sources of Data (interviews and written materials:

Interviews:

- Isa Aron-3/18/98 & 6/25/98
- Sara Lee-3/17/98

Written Materials:

- "A Short Course on Conducting Community Conversations as part of the Experiment in Congregational Education"-Draft 1 created for the March, 1998 ECE Kallah
- Aron, Isa, "Minding the Process in Transformational Change", CCAR Journal: A Reform Jewish Quarterly, Winter 1998
- Aron, Isa & Samuels, Laura, "New Leadership Demands in a Congregational Change Effort", presentation at the Conference on Research in Jewish Education, June 1998
- Aron, Isa & Zeldin, Michael, "Change in Jewish Education: Prescriptions and Paradoxes", Agenda Jewish Education, JESNA, 1996
- Benchmarks for ECE Congregations
- ECE Process Tracking Form
- Experiment in Congregational Education-Directory-Updated March, 1998
- Lee, Sara S., Editor, "Communities of Learning: A Vision for the Jewish Future", Hebrew Union College-Jewish Institute of Religion-Rhea Hirsch School of Education-Los Angeles, 1997 (publication made possible by a gift from the family of Rhea Hirsch)
- Protocol:The Experiment in Congregational Education: A Project of the Rhea Hirsch School of Education, Hebrew Union College-Jewish Institute of Religion, Los Angeles-Tamuz, 5756; Summer, 1996
- Why Text Study in the ECE?: Readiness Protocol: Session One 11/30/96

Address and Phone # For Learning More About This Change Project:

Isa Aron-Professor & Director of ECE (213) 939-9021
Sara Lee-Dean of Rhea Hirsch School of Education (213) 749-3424 x4216

Hebrew Union College (HUC)
Rhea Hirsch School of Education
3077 University Avenue
Los Angeles, CA 90077

Sponsoring Agency Type:

- ☐ national organization
- ☐ central education agency
- ☐ federation or continuity commission
- ☐ foundation
- ☒ movement, movement-affiliated college or other organization
- ☐ individual synagogue

Type of Synagogue Change Project:

- ☒ planned total synagogue change
- ☐ planned total synagogue school change
- ☐ planned change targeted to one aspect of synagogues at a time
- ☐ 'organic' unplanned change

- ☒ national
- ☐ regional
- ☐ one synagogue

Movement affiliation of synagogues involved in this change project:

- ☐ Trans-denominational
- ☐ Orthodox
- ☐ Conservative
- ☒ Reform
- ☐ Reconstructionist

of Participating Synagogues: 14 total:

5 *vatikim* in first tier (Fall, 1993) ; 7 *chadashim* in second tier (Spring, 1997);
2 'kick-off' synagogues that were "part of ECE before there was an ECE" but that
were integrated with the first tier *vatikim* for retreats (*kallot*).

Names & Characteristics of Participating Synagogues:

'Proto' synagogues ("part of ECE before there was an ECE") which were integrated into Vatikim Tier 1:

| <u>Name</u> | <u>Location</u> | <u>Size</u> |
|-----------------------|---------------------|-------------|
| •Congregation Beth Am | Los Altos Hills, CA | |
| •Leo Baeck Temple | Los Angeles, CA | |

Vatikim-Tier 1 (Fall, 1993):

| <u>Name</u> | <u>Location</u> | <u>Size</u> |
|-------------------------------|-----------------|-------------|
| •Congregation Shaare Emeth | St. Louis, MO | |
| •Temple Emanu-El of San Diego | San Diego, CA | |
| •Temple Shalom of Newton | Newton, MA | |
| •The Temple | Atlanta, GA | |
| •Westchester Reform Temple | Scarsdale, NY | |

Chadashim- Tier 2 (Spring, 1997):

| <u>Name</u> | <u>Location</u> | <u>Size</u> |
|----------------------------------|-----------------|-------------|
| •Congregation Beth Torah | Kansas City, KS | |
| •Congregation Sinai | Milwaukee, WI | |
| •Har Sinai Congregation | Baltimore, MD | |
| •Isaac M. Wise Temple | Cincinnati, OH | |
| •Temple Emanuel of Beverly Hills | Los Angeles, CA | |
| •Temple Emanu-El of Dallas | Dallas, TX | |
| •Temple Sinai | Stamford, CT | |

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 2

Title of Synagogue Change Project: Experiment in Congregational Education (ECE)

Objectives of Project:

- to transform synagogues into "communities/congregations of learners" (i.e. synagogue communities where Jewish education is central and where Jewish learning takes place "in a deep way" throughout the congregation) and "learning communities/congregations" (i.e. "learning communities" a la Peter Senge, characterized by ongoing self-reflection, shared leadership between professional and lay leaders, and continuous deliberations aimed at problem-solving and self-improvement);
- to change synagogue culture and structure in order to make Jewish learning central to the life of the synagogue
- to put Jewish learning at the center of congregational life
- to make Jewish education pervasive in synagogues
- to enable congregations to transform themselves (each in their own way) into educational institutions, based on the belief that you can only have deep Jewish learning in part of the synagogue if Jewish education is a core value in the institution as a whole

Description of Change Project (the project's vision of synagogue life & the project's change process/"how it works"):

Vision of synagogue life: "communities/congregations of learners" and "learning communities/congregations"; According to the ECE protocol: "We see change as systemic and continuous-a permanent state, not a means to a pre-defined end". However, as Sara Lee points, out, "change is the mechanism, not the goal" of ECE.

Underlying assumptions: One of the cardinal principles of Reform Judaism is that of informed choice based on a deep understanding of the Jewish tradition; This type of understanding is best achieved through the study of Torah (the repository of Jewish values and thinking which includes the Bible, Talmud, Midrash, modern commentaries and responsa); Jewish learning must be systemic throughout the synagogue; Synagogue change must be holistic; The specific needs facing the participating congregations will vary according to their particular circumstances and needs.

How it works: Based on the written protocol, the following components form the common pattern which guide the activities of all participating synagogues:

- 1) an educational task force of 20-50 professional and lay leaders that meets 6-8 times per year over a period of 2-3 years

The purpose of the task-force is three-fold:

- a) to articulate the congregation's vision of Jewish learning

- b) to inquire into every aspect of the synagogue's current educational program
- c) to institute a series of smaller, more immediate innovations that will be steps to the ultimate goal

The task-force engages in the following steps during its first 2-3 years:

- a) readiness assessment
 - conducting an inventory of the congregation's educational offerings
 - studying & reflecting on the congregation's structure and culture
 - assessing the task force's strengths and weaknesses as a team
- b) visioning process
- c) team building
- d) implementation and analysis of community conversations
- e) planning and implementation of early innovations
- f) reflection on "best practices"
- g) planning and implementation of major initiatives

2) a leadership team that guides the work of the task force, comprised of the task force chair, a coordinator, the rabbi, the educator, and other members of the congregation who are particularly skilled at group facilitation, public relations, conducting focus groups, and/or analyzing and reporting research

3) an ECE advisor who spends 20 days per year assisting the leadership team and the task force of each synagogue

4) study retreats (kallot) for all of the leadership teams from each of the participating congregations-5 times during the course of the first 3 years of the project. Each *kallah* is designed to prepare the leadership teams for the next phase of the ECE process and to provide opportunities for networking with other congregations. Approximately 4-10 people (professionals and lay leaders) from each synagogue attend each *kallah*.

5) ongoing evaluation by ECE staff researchers

Note: The protocol is a description of ECE's envisioned process for the second tier of participating synagogues, based on lessons learned with the first tier of participating synagogues (*vatikim*). One marked change in the ECE process from tier 1(*vatikim*) to tier 2 (*chadashim*) is the addition of four readiness sessions in which synagogues have to engage to test their own readiness for the rest of the ECE process; at the end of these four sessions, each synagogue decides if it is actually ready to proceed to the next steps of the process.

Adaptation of the process to each individual synagogue: "The roadmap looks the same for all synagogues but the journey looks different". ECE provides the template of steps each synagogue has to take (including Jewish study, visioning exercises, community conversations, etc.), but the "how" and the "outcomes" are expected to look different at each participating synagogue.

History of Change Project (when it started, who started it, etc.):

When Sara Lee was teaching a class in organizational theory to Jewish education students at HUC's Rhea Hirsch School of Education, she was inspired by Samuel Heilman's study of synagogue supplementary schools. Based on Heilman's work, Sara Lee concluded that in order to be able to effect true changes in supplementary school education, synagogues needed to be changed in a systemic and holistic way; there was a need to change the synagogue culture in which the supplementary school is situated. At the same time that these ideas were formulating, Rabbi Rick Block of Congregation in Beth Am contacted Sara Lee about making some improvements in his synagogue. With Sara in the role of outside educational consultant, Beth Am underwent a change process that was led internally by a lay leader (Eddie Reynolds) who had professional expertise as an organizational change consultant. Much of the process at Beth Am became the prototype for the process that was to become ECE. After receiving a grant from the Cummings Foundation, the Rhea Hirsch School of Education at HUC commissioned some papers on synagogue change and convened a conference in Malibu in 1993 entitled "Reconceptualizing Congregational Education". At the conference, a few papers were presented and two Reform synagogues, Beth Am (Los Altos Hills, CA) and Leo Baeck (Los Angeles, CA), presented their own cases of synagogue change. Based on learning from the change processes at Beth Am and Leo Baeck, from the commissioned papers, and from conference discussion sessions with academics and synagogue professionals, the ECE synagogue change process was drafted.

The first tier of participating synagogues (*vatikim*) began the ECE process in the fall of 1993, with congregations of varying sizes, drawn from regions throughout the United States.

Synagogue Selection Process (how synagogues were selected to participate):

There was no application or selection process for the first tiers of ECE because it was thought that the selection process might be too politically charged within the Reform Movement. Faculty members of the Rhea Hirsch School of Education, including Michael Zeldin, Isa Aron, and Sara Lee, approached some Reform synagogues directly. Synagogues were selected based on their meeting certain criteria such as stability (low turnover of senior staff), a "broad" view of Jewish education, and a track record of shared leadership between and among lay and professional leaders. In addition, Rhea Hirsch faculty members wanted to select synagogues that were diverse in terms of size and geography.

Role of outside organization:

HUC's Rhea Hirsch School of Education established the ECE protocol and currently coordinates ECE at the national level. Isa Aron is the hands-on project director who oversees ECE at the national level, develops curriculum and programs for inter-synagogue retreats (*kallot*), acts as an advisor to one synagogue (Temple Emanuel of Beverly Hills), and acts as a troubleshooter for all of the participating synagogues.

Sara Lee is an ongoing consultant to the ECE planning process and advises Isa Aron as needed. There are 9 advisors who work with the individual synagogues, including Isa Aron.

Role of outside consultants: Each of the 9 advisors work with one or more of the participating synagogues. Each advisor approaches advising differently; there is no one model. Current advisors are Dr. Isa Aron, Marci Dickman, Susan Huntting, Dr. Cecile B. Jordan, Rabbi Samuel Joseph, Rabbi Amy Wallk Katz, Randy Sheinberg, Dr. Susan Shevitz, and Joy Wasserman.

How it is funded: grants from the Mandel Associated Foundations, Cummings Foundation, and the Covenant Foundation

In 1993, Hebrew Union College's Rhea Hirsch School of Education received a \$750,000 grant from the Mandel Associated Foundations and decided to allocate a percentage of the grant to ECE; ECE was one of 12 initiatives that were funded by this grant.

In addition, the Rhea Hirsch School received 3 additional grants from the Cummings Foundation for ECE:

- 1) a planning grant that funded the 1993 consultation in Malibu and the publication of papers in the book A Congregation of Learners (Aron, Lee, & Rossel, 1995)
- 2) a grant to fund many of the activities of ECE's first round (beginning in 1994), including the Rhea Hirsch School's planning expenses and the *vatikim* synagogues' advisors for a 3-year period
- 3) a grant for the Rhea Hirsch School's faculty and staff to plan the second round of ECE for the *chadashim* (Note: This grant did not cover the costs of the advisors.)

A grant from the Covenant Foundation in 1995 that went directly to the consortium of 7 *vatikim* synagogues funded the synagogues' travel expenses to *kallot*. The Covenant Foundation also paid for participating *vatikim* synagogues to have an on-site coordinator (if needed) and it covered Rhea Hirsch School faculty members' *kallot* travel expenses.

Costs to synagogues for participation in ECE:

For the *vatikim* (first round):

Cost of registration for *kallot*

For the *chadashim* (second round):

Cost of registration and travel for *kallot*

Consulting fees of advisors

Salary of on-site coordinator (if not a lay person)

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 3

Title of Synagogue Change Project: Experiment in Congregational Education (ECE)

Definitions of "Success":

- Jewish learning being one of the most visible and pervasive things going on in the synagogue, with deep Jewish learning going on in many ways throughout the institution
- Jewish learning and values incorporated into various aspects of synagogue decision-making (including fiscal and membership policy)
- more Jewish education going on in synagogues (more frequent opportunities for Jewish learning, more people engaged in Jewish learning, Jewish education that is deeper and/or broader throughout the synagogue, Jewish education that is text-based and substantive rather than "borderline Jewish learning" such as Jewish cooking classes)
- many lay people engaged in Jewish learning
- text-study and other forms of Jewish learning regularly incorporated into synagogue meetings (including board meetings, task force meetings, committee meetings) because of the perception "This is the way we now do business"
- lay people doing most of the teaching in the synagogue (e.g. in the school, on the bimah, and at board meetings), with the professional staff acting as the facilitators and consultants who teach the lay people how to teach by being the "enablers" of Jewish learning in the congregation
- parents having high expectations of what their children should get out of Jewish education in the synagogue (beyond Bar/Bat Mitzvah training)
- synagogue having a governance structure that reflects its emphasis on education
- an energized school that is "doing creative things"
- well-developed leadership partnerships between professional and lay leaders in synagogues
- synagogues "doing business completely differently" as a result of the ECE process
- congregants being more self-reflective (e.g. talking about programs after they have been implemented)

Benchmarks of a "congregation of learners":

- creation of new programs that relate to learning
- a learning dimension added to one or more established programs
- evidence of a growing awareness by program planners of the potential for learning in each program
- more people involved in the planning of educational programs
- new cadre of teachers being developed
- evidence that there is a growing awareness in the congregation that learning is a priority
- evidence that there is a sense of excitement from congregants that they are learning new things (many people feeling the sense of excitement and the number is growing)

- more people participating in learning activities
- new constituencies for learning being identified
- meetings including a study component
- conversations taking place about what should be studied at meetings
- the synagogue bulletin becoming more of a teaching and learning resource

Benchmarks of a "learning congregation":

- evidence of shared leadership and increased teamwork
- evidence of increased reflectiveness about program goals and outcomes
- evidence of increased reflectiveness about other aspects of synagogue life
- evaluation of programs
- expanded circle of people involved in the planning of learning activities
- discussions taking place about the appropriate committee and board structure that would best facilitate learning

Title of Synagogue Change Project: Experiment in Congregational Education (ECE)

Perceived Outcomes to Date ("What's Happening?"):

1) IMPLEMENTATION

- All participating congregations follow the ECE protocol.

2) IMPACT

- "We're so far from the end of the journey, we are still not sure about outcomes".
- Learning has a higher profile than it used to at all participating congregations.
- All task-force members and most congregants believe that Jewish education is not just for children, and they can point to something in their synagogues as evidence of this belief.
- Some congregations have become the living embodiments of the "congregation of learners" and the "learning congregation". Other congregations are still striving towards these ideals. All participating synagogues have achieved at least a modicum of "programmatic successes"; there have not been any "utter failures".

Title of Synagogue Change Project: Experiment in Congregational Education (ECE)

Hunches Re: Factors Linked to "Success":

"There may be a list of 10 things that help facilitate change, but you don't need all 10, maybe just 7"

"Something I hope you will be able to say at the end of this study:

"It takes 10 things to succeed, but if you have these 7 things then it's OK"

1) CHARACTERISTICS OF SYNAGOGUES:

(Note: These factors that facilitate change are not listed in order)

Necessary Factors:

- many different lay champions of the change process who are excited about ECE, put energy into it, and "talk it up" because it's the most exciting thing that's happened (the more lay champions the better)
- a rabbi who is interested in learning & who is willing to put in the time as a participant in the ECE process without taking over (rabbis who "get it")
- rabbi who embodies a philosophy of shared leadership and who does not view learning as "unidirectional from pulpit to congregation"
- some openness by professionals (rabbis) to "give up Jewish turf" and for lay leaders to help "develop the turf"
- some openness by professionals and lay leaders to redefine how they work together
- a good coordinator (lay or staff) at the synagogue level: someone who schedules meetings, keeps people informed and plugged in, and smoothes ruffled feathers
- skills needed by educator (still figuring out what these necessary skills are)
- internal resources (money & staff)
- some level of stability
(If changing rabbis every two years, it's not going to happen)
- recognition that things won't happen quickly and dramatically
- teams that function well (teamwork is a value in and of itself; an end, as well as a means to an end)
- capacity to develop an appreciation of process (among key professionals and lay leaders) ("That's a struggle every step along the way. Some say, 'Let's stop talking and start implementing new programs'")
- synagogue culture that is supportive of change

Stumbling block to change:

- the "brick wall" of congregational culture and structure
("Even the most visionary professional will only be able to go so far without the appropriate synagogue culture" that is conducive to change)

Factors that are conducive to change but are not necessary:

- task force chair who looks at the "big picture", is a good facilitator, and acts as a champion for the project

- skills needed by lay people, such as expertise in market research or focus groups or text-study ("It adds something quite wonderful to the process when people are able to add their expertise" "You can do it without them, but they really add")
- a gifted educator (but only if you have the appropriately supportive synagogue culture that is conducive to change)

2) CHARACTERISTICS OF THE CHANGE PROCESS:

- "There is no simple way to change"
- It would be difficult to do this without "community conversations", "visioning" and "text-study"
- structured 4-step "readiness" process ("It doesn't have to be these particular 4 steps, but do need some "readiness" process) (Cohort #2 had a readiness session before the Kallah & it really made them come together at the Kallah vs. Cohort #1)
- Underlying theory behind ECE: "In order to bring about a change in any part of the synagogue, there ought to be a change in the whole. Change in a part requires some change in the whole".
- teams that function well (teamwork is a value in and of itself; an end, as well as a means to an end)
- "Strategic planning is not synagogue change"

Hunches Re: Factors Linked to "Success":

From Isa Aron's article with Michael Zeldin, "Change in Jewish Education: Prescriptions and Paradoxes", Agenda Jewish Education, JESNA, 1996:

List of the reasons why changes failed to take hold or to achieve their desired outcome-based on Jewish ed. reforms & ECE & Day Schools 21st Century:

- 1) Those who advocated change had a vision of a future state, but little understanding of how to translate their ideas into concerted and effective action
- 2) Advocates of change didn't anticipate and were not prepared to handle the resistance they would encounter because one or more of the following factors were at play: inertia, resignation, fear of the unknown, aversion to risk, failure to communicate a compelling vision in concrete and accessible terms
- 3) The decision to change was made by too small a group
- 4) People's conception of change was too simplistic and mechanistic. It was assumed that change could be accomplished either by telling people what to do; purchasing a new textbook, curriculum or program; sending people to a workshop in which they would learn how to make the change; or bringing in a new staff person
- 5) The institution did not have enough resources (either human or material) to support the change.

Lessons about change learned from ECE and Day Schools for 21st Century:

- 1) Readiness for change requires both a baseline of stability and a modicum of dissatisfaction with the current situation
- 2) Change must be rooted in tradition while focused on the future
- 3) Successful change is both planful and emergent
- 4) The institution's leaders must be able to inspire others, even as they are inspired by them
- 5) Change agents must take the long view while navigating the short term
- 6) Successful change requires both action and analysis (managing all of the balancing acts in #1-#5 by reflecting and being self-critical of process); (need at least one person on task force who is skilled at analysis and evaluation)

Hunches Re: Factors Linked to "Success":

ECE-from the written protocol: Summer 1996-

p. 10: READINESS:

What does a congregation need in order to participate successfully in the ECE?

"Our experiences in the first three years have led us to conclude that a congregation's success in the ECE will depend upon four factors":

- 1) The ability of a core group of leaders to work on a demanding series of tasks in a concerted manner over a period of 5-7 years
- 2) The willingness and ability of members of this core group, comprised of lay people and a number of professionals, to work as a team.
- 3) The ability of the leadership team to be self-reflective-to examine openly and critically the congregation's strengths and limitations, and their own successes and failures.
- 4) The willingness of congregational leaders to take a number of risks: to re-think and revise some of their assumptions; to explore alternative institutional arrangements; and to set forth on a journey whose ultimate destination cannot be fully discerned from the outset.

Hunches Re: Factors Linked to "Success":

from "New Leadership Demands in a Congregational Change Effort"-by Isa Aron & Laura Samuels- presentation at the Conference on Research in Jewish Education, June 1998

"Leaderly behaviors" that are found in "successful" congregations:

- 1) developing a "shared vision"
- 2) becoming "self reflective" about themselves as individuals and about the team
- 3) honing communication skills
- 4) becoming increasingly sophisticated about the work of the team

(NOTE: These factors are not necessary a priori; these are behaviors that develop over time as part of the ECE process).

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 1

Title of Synagogue Change Project: Friday Night Alive

Sponsoring Agency: Jewish Continuity Initiative of the Jewish Federation of Greater Philadelphia & CMS Companies (CMS Foundation)

Sources of Data (interviews & written materials):

Interviews:

- Ellen Bernstein-Federation-4/24/98
- Susan Rainey-CMS-4/16/98

Written Materials:

- Advertisement & Brochure: "For Those Devout And Those Who Doubt: Friday Night Alive! The Shabbat Phenomenon" (1997/1998)
- Elkin, Michael, "Plugging into Shabbat Unplugged: 'Jewish Soul Train' Arrives at Temple", Jewish Exponent, date? 1998.
- Evaluation Card: Friday Night Alive! (1997/1998)
- Geschwind, Naomi, "Friday Night Alive: A Swinging Shabbat Comes to Philly", Jewish Exponent, November 13, 1997.
- Geschwind, Naomi, "It's Alive-Innovative Shabbat Experience Attracts 900 to Elkins Park Shul", Jewish Exponent, November 13, 1997.
- Gross, Jane, "From No Quorum to No Room: A Talmudic Quandary for a Shul: Growth or Intimacy", The New York Times: The Metro Section, Friday, December 6, 1996.
- Lewis, Joe, with additional commentary by Bernstein, Ellen, Friday Night Alive! Service of the Heart-Shabbat Evening Service-Maariv L'Erev Shabbat, The Singlish Publication Society, Oak Park, MI, 1997.
- Invitation: Re: Friday Night Alive: The Shabbat Phenomenon, October, 1997.
- O'Reilly, David, "Synagogues Liven Up Fridays: Experimental Shabbat Services Are Drawing Hundreds", The Philadelphia Inquirer, Saturday, April 25, 1998.

Address and Phone # For Learning More About This Change Project:

Ellen Bernstein-Director of Jewish Continuity Initiative at the Jewish Federation of Greater Philadelphia (215)893-5835

Paul Silberberg & Mark Solomon, Chairman & President of CMS Companies
(215) 246-3035

Jewish Federation of Greater Philadelphia
226 S.16th Street
Philadelphia, PA 19102

CMS Companies
1926 Arch Street
Philadelphia, PA 19103

Sponsoring Agency Type:

- ☐ national organization
- ☐ central education agency
- ☒ federation or continuity commission
- ☐ foundation
- ☐ movement, movement-affiliated college or other organization
- ☐ individual synagogue
- ☒ other (individual donors)

Type of Synagogue Change Project:

- ☐ planned total synagogue change
- ☐ planned total synagogue school change
- ☒ planned change targeted to one aspect of synagogues at a time
- ☐ 'organic' unplanned change

- ☐ national
- ☒ regional
- ☐ one synagogue

Movement affiliation of synagogues involved in this change project:

- ☒ Trans-denominational
- ☐ Orthodox
- ☒ Conservative (1997/1998 and 1998/1999)
- ☒ Reform (beginning 1998/1999)
- ☒ Reconstructionist (1997/1998 and 1998/1999)

of Participating Synagogues: 7 services in 6 synagogues in 1997/1998; at least 10 additional services in 10 synagogues planned for 1998/1999.

Names & Characteristics of Participating Synagogues:

All participating synagogues are in the Philadelphia area. In the first year of this program, all of the host synagogues were Conservative or Reconstructionist, but not by design. In 1998/1999, at least 5 Reform synagogues and 5 Conservative or Reconstructionist synagogues will host a Friday Night Alive service (3 of which hosted the service the previous year as well).

| <u>Name</u> | <u>Location</u> | <u>Size</u> | <u>Movement</u> |
|--------------------------|---------------------|-------------|--|
| Adath Jeshurun | Elkins Park, PA | | Conservative |
| Beth Am Israel | Penn Valley, PA | | Conservative w. Reconstructionist rabbi |
| Beth Hillel | Wynnewood, PA | | Conservative |
| Beth Zion-Beth Israel | Philadelphia, PA | | Conservative |
| Germantown Jewish Center | Philadelphia, PA | | Conservative & Reconstructionist |
| Or Hadash | Fort Washington, PA | | Reconstructionist |

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 2

Title of Synagogue Change Project: Friday Night Alive

Objectives of Project:

- to enrich Jewish synagogue life in Philadelphia by conducting Friday night Shabbat services that are similar to those at B'nai Jeshurun on Manhattan's Upper West Side; to "breath life into Friday night services"
- to expose people to the possibilities of what Jewish services have to offer and to the possibility that they can be exciting
- to inspire rabbis and congregations to explore more innovative and participatory ways of spiritually enhancing their prayer services

Description of Change Project (the project's vision of synagogue life & the project's change process/"how it works"): Throughout the year, B'nai-Jeshurun-like Friday night Shabbat services were conducted in Philadelphia-area synagogues. Each of the services was widely publicized throughout the Philadelphia area with large ads in the Jewish Exponent and tasteful promotional materials distributed in bookstores and therapists' offices as well as in Jewish venues. Some of the services were led by B'nai Jeshurun staff, Cantor-Keyboardist Ari Priven and Rabbi Yael Ridberg (a recent Reconstructionist Rabbinical College graduate who used to be a member of Germantown Jewish Center and the Marshall T. Meyer Rabbinic Fellow at B'nai Jeshurun). Other services were led by Shabbat Unplugged, a group of Philadelphia-area rabbinically-trained musicians who are students or graduates of the Reconstructionist Rabbinical College. Some of the characteristics of the service include participatory sing-along melodies interspersed with traditional nusach, instrumental music, singing rabbis in lieu of a cantor as shaliach tzibur, dancing in the aisles, and a "Friday Night Alive" Siddur entitled "Service of the Heart"(which includes modern English translations and commentaries, convenient Hebrew phrasing, "Singlish" singable English rhymed translations of the prayers, transliteration, and instructions for every part of the service).

The publicity brochure and print ad for Friday Night Alive reads:

For Those Devout And Those Who Doubt,

Friday Night Alive! The Shabbat Phenomenon

From no turnout to no-room, the Shabbat service at Congregation B'nai Jeshurun in New York City has grown to an overflow crowd of 2000 on a typical Friday night. A series of similar Shabbat services at various synagogue throughout the Philadelphia area have been scheduled with guest rabbis. The service runs one hour and utilizes music and dancing to generate a feeling of spirituality and inclusiveness.

History of Change Project (when it started, who started it, etc.):

After attending Friday night services at Congregation B'nai Jeshurun in New York in 1996, the Chairman and President of CMS Companies (Paul Silberberg and Mark Solomon) decided to "transplant the Manhattan service" to Philadelphia-area

synagogues. Impressed by the "standing room only" crowd at B'nai Jeshurun and the excitement generated by the keyboard-accompanied singing-rabbi-led services, these two businessmen applied for a culture grant from the Jewish Federation of Greater Philadelphia in an effort to export the B.J. phenomenon to Philadelphia. In 1996, CMS brought in staff from B'nai Jeshurun to run B.J.-type participatory services at the University of Pennsylvania Hillel and at Temple Beth-Hillel/Beth El in Wynnewood, Silberberg's home congregation. Initially planning to fund the project themselves, Silberberg and Solomon now jointly fund the project with the Jewish Federation of Greater Philadelphia (as of October, 1998). After Silberberg and Solomon submitted a Jewish Culture grant proposal which then got forwarded to the director of the Federation's Jewish Continuity Initiative (Ellen Bernstein), Friday Night Alive was expanded to 7 services in 6 synagogues in 1997/1998.

Synagogue Selection Process (how synagogues were selected to participate):

There was no formal selection process in 1997/1998. Silberberg and Solomon contacted rabbis they knew, including the rabbis of their own congregations, to host the Friday Night Alive services in their synagogues. In the spring of 1998, the Federation's Continuity Commission sent out a letter to all synagogues in the Greater Philadelphia area inviting them to host a Friday Night Alive service in 1998/1999. The Federation received 20 requests for the service from 'new' synagogues and 3 requests for 'repeats' from synagogues that had hosted the service in 1997/1998.

Role of outside consultants: n/a

Role of outside organization: The service is planned, publicized, and implemented primarily by people outside of the host synagogues (including people from Federation, CMS, B'nai Jeshurun and/or Shabbat Unplugged). Synagogues provide the *oneg/kiddush* after services and publicize extensively to the synagogue community.

How it is funded: grant from the Jewish Continuity Initiative of the Jewish Federation of Greater Philadelphia and CMS Companies (CMS Foundation).

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 3

Title of Synagogue Change Project: Friday Night Alive

Definitions of "Success":

- participants being excited by the services
- non-synagogue members joining synagogues
- congregational leaders in synagogues becoming open to the possibility of conducting services in a different way (e.g. if they say, "Wow, maybe we don't have to the same thing every time")
- high attendance at services
- if one synagogue changed their style of services to "the B.J. thing"

Title of Synagogue Change Project: Friday Night Alive

Perceived Outcomes to Date ("What's Happening?"):

1) IMPLEMENTATION:

2) IMPACT:

- According to an article in the Philadelphia Inquirer, there were over 600 men, women, and children at each service.
- According to an article in the Jewish Exponent, there were 900 people at the first Friday Night Alive service in at Adath Jeshurun in Elkins Park.
- There were over 800 people at the 7th service of the 1997/1998 year at Beth Zion-Beth Israel in Center City Philadelphia.
- Based on the 1200 evaluation/response cards that were given back after services, 80% of respondents reported an "enthusiastic" or "enjoyable" response.

Title of Synagogue Change Project: Friday Night Alive

Hunches Re: Factors Linked to "Success":

1) CHARACTERISTICS OF SYNAGOGUES:

2) CHARACTERISTICS OF THE CHANGE PROCESS:

- "the marketing has made it work": beautiful logo & beautiful published pieces ("People don't usually associate Judaism and beauty"): very accessible and contemporary brochures distributed everywhere (therapists offices, bookstores, not just Jewish venues) + big ads in the Jewish Exponent every month + article in the Enquirer (4/25/98) + other articles; graphics person at CMS coordinated all the publicity

- "critical mass": CMS had a built-in audience of 100 people who are their "groupies" who regularly attend these "Friday Night Alive" services

- buy-in from lots of different communities: people who care and who bring their friends

- "It became a thing": The event got really talked about as a service that was warm, friendly, & created good feelings; It "feels good", so you come to the next service

- the Siddur itself

- "For a great idea to emerge, it needs to be able to break the pavement". "Change comes about through creative thinkers, not through bureaucratic structures" such as Federation and synagogue (where there is "so much weight on top")

- charismatic leadership that provided an outside impetus to the project: "They (Silberberg and Solomon) make things happen.. Nothing is too big or small for them"

- lay support and advocacy: lay leaders advocating for the program and "putting their money where their mouth is"

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 1

Title of Synagogue Change Project: Grants Program of the Jewish Continuity Commission of the UJA-Federation of New York

Sponsoring Agency: Jewish Continuity Commission of UJA-Federation of Jewish Philanthropies of New York, Inc.

Sources of Data (interviews & written materials):

Interviews:

Dr. Alisa Rubin Kurshan: 5/14/98, 5/28/98, & 6/18/98

Written Materials:

- Jewish Continuity: 1995-1998 Grants of the UJA-Federation Jewish Continuity Commission
- Jewish Continuity: 1994-1997 Grants of the UJA-Federation Jewish Continuity Commission
- Jewish Continuity Commission Request for Proposals (for initiatives beginning July 1, 1998), September, 1997.
- Wartenberg, Dr. Dan & Kurshan, Dr. Alisa Rubin, Lilmod U'Lelamed-To Learn and to Teach-Mid-Year Report to the Jewish Continuity Commission of UJA-Federation of New York-Volume One-Summary Analysis-April 1997-Nissan 5757.
- Wartenberg, Dr. Dan; Kurshan, Dr. Alisa Rubin; Helman, Charles; & Rawitch, Dana, Lilmod U'Lelamed-To Learn and to Teach-Report #2-Report to the Jewish Continuity Commission of UJA-Federation of New York-October 1997-Tishrei 5758.
- "What Does Being Jewish Mean To Me?"-publicity brochure for the Jewish Continuity Commission of UJA-Federation of New York-1998.

Other Sources of Data:

written comments by John Ruskay-6/23/98

Address and Phone # For Learning More About This Change Project:

Dr. Alisa Rubin Kurshan (212) 836-1242
130 East 59th Street
New York, NY 10022-1302

Sponsoring Agency Type:

- national organization
- central education agency
- ☒ federation or continuity commission
- foundation
- movement, movement-affiliated college or organization
- individual synagogue

Type of Synagogue Change Project:

- ☐ planned total synagogue change
- ☐ planned total synagogue school change
- ☒ planned change targeted to one aspect of synagogues at a time
- ☐ 'organic' unplanned change

- ☐ national
- ☒ regional
- ☐ one synagogue

Movement affiliation of synagogues involved in this change project:

- ☒ Trans-denominational
- ☒ Orthodox
- ☒ Conservative
- ☒ Reform
- ☒ Reconstructionist

of Participating Synagogues:

Total # of synagogue initiatives that received grants from 1994-1999: 27

(23 individual synagogues+ 3 grants to the denominational movements + 1 community initiative that is a collaboration of 7 synagogues in Brownstone Brooklyn)

(Note: 1 of the individual synagogue initiatives lost its funding after the first year)

of synagogue initiatives that received new grants in 1994/1995: 6

(5 individual synagogues + 1 grant to a denominational movement)

of synagogue initiatives that received new grants in 1995/1996: 2

(2 individual synagogues)

of synagogue initiatives that received new grants in 1996/1997: 7

(4 individual synagogues + 2 grants to denominational movements + 1 community initiative that is a collaboration of 7 synagogues in Brownstone Brooklyn)

of synagogue initiatives that received new grants in 1997/1998: 4

(4 individual synagogues)

of synagogue initiatives that received new grants in 1998/1999: 7

(7 individual synagogues)

Names & Characteristics of Participating Synagogues:

Synagogue initiatives that received new grants in 1994/1995:

•Congregation Beth Elohim Day School

•Congregation Kehilath Jeshurun: Rethinking Outreach

(young singles, Shabbat beginners program)

(Manhattan)

(Orthodox)

•Holliswood Jewish Center : The Nineties Jew

(adult education)

(Queens)

(Orthodox)

- The Huntington Jewish Center: Comprehensive Family Education Program
(thematic family education curriculum) (Huntington) (Conservative)
- Reconstructionist Synagogue of the North Shore: We Learn From One Another
(family education) (Plandome) (Reconstructionist)
- United Synagogue of Conservative Judaism: Hands Across the Aisle : Families Helping Families
(user-friendly community) (regional) (Conservative)

Synagogue initiatives that received new grants in 1995/1996:

- Congregation Ansche Chesed: Culture of Learning
(Jewish literacy, adult & family education) (Manhattan) (Conservative)
- Kew Gardens Synagogue Adath Jeshurun: Mercaz HaNoar Center for Youth Education
(youth education for New Americans) (Queens) (Orthodox)

Synagogue initiatives that received new grants in 1996/1997:

- Congregation B'nai Jeshurun: Building a Sacred Community
(intimate communities, new members, singles) (Manhattan) (unaffiliated)
- Jewish Board of Family & Children's Services (JBFCs): Brownstone Brooklyn Community Transformation Project (collaborative strategic model of community building and transformation)
(Brooklyn Heights Synagogue, Congregation Baith Israel Anshei Emes/ Kane Street, Congregation Beth Elohim, Congregation Mt. Sinai, Kolot Chayeinu, Park Slope Jewish Center, & Union Temple)
(collaboration of JBFCs & 7 congregations) (Brooklyn) (trans-denominational)
- Kingsway Jewish Center: Integrating Russian Jewish Immigrant Families
(integrating New Americans; community) (Brooklyn) (Orthodox)
- Orthodox Caucus: Rabbinic Leadership Training Program
(project-based professional development) (national & Canada) (Orthodox)
- Temple Israel Center: Intergenerational Encounter, Learning, and Video History
(intergenerational education) (White Plains) (Conservative)
- Union of American Hebrew Congregations (UAHC): Partners for Synagogue Change
(leadership development, synagogue change) (Manhattan, Westchester, Long Island) (Reform)
- West End Synagogue: Ldor VaDor: Shabbat as a Framework for Family Education
(family education) (Manhattan) (Reconstructionist)

Synagogue initiatives that received new grants in 1997/1998:

- Beth El Synagogue Center: Jewish Continuity-Increased Outreach to the Special Needs Community
(outreach for people with physical and learning disabilities) (New Rochelle) (Conservative)
- Temple Beth Israel: Jewish Music: A Prelude to our Future
(Jewish music, intergenerational music history) (Port Washington) (Conservative)
- Temple Beth Shalom: Creating a Kehilla Kadosha: Respiritualization of the American Synagogue
(comfort with rituals, Shabbat, & prayer) (Roslyn Heights) (Conservative)

- Westchester Reform Temple: Center for Jewish Living and Learning High School Initiative
(teens, Jewish literacy) (Scarsdale) (Reform)

Synagogue initiatives that received new grants in 1998/1999:

- Congregation Beth Simchat Torah: Jewish Learning Through the Life Cycle
(intergenerational Jewish education; outreach to unaffiliated Jewish gays and lesbians)
(Manhattan) (unaffiliated)
- Larchmont Temple Har Chayim: Bar/Bat Mitzvah: The Journey of Becoming
(family education centered on Bar/Bat Mitzvah) (Larchmont) (Reform)
- Lincoln Square Synagogue: Kollel: New York's First Religious Zionist Learning Experience
(Beit Midrash hosted by hesder yeshiva students) (Manhattan) (Orthodox)
- Park Avenue Synagogue: Toward an Intergenerational Learning Community
(database of family information for family ed. planning) (Manhattan) (Conservative)
- Pleasantville Community Synagogue: The Inclusive Suburban Synagogue
(establishing Jewish living: literacy, observance & commitment) (Pleasantville)(unaffiliated)
- Society for the Advancement of Judaism (SAJ): Touchstones to Tablets
(experiential adult Jewish education for the unaffiliated) (Manhattan) (Reconstructionist)
- Town and Village Conservative Synagogue: Jewish Healing: A Gateway to Enhanced Spirituality
(healing prayer services; integration of participants) (Manhattan) (Conservative)

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 2

Title of Synagogue Change Project: Grants Program of the Jewish Continuity Commission of the UJA-Federation of New York

Objectives of Project:

Objectives of the Continuity Commission:

- to assure in New York "both a continued presence of a large and diverse Jewish community, and the continued quality, vitality and magnetism of those Jewish institutions and experiences on which the self-identification of Jews as Jews will depend"
- to serve as a catalyst for a community-wide effort to insure Jewish continuity by enhancing the capacity of institutions to "refract all aspects of life through the prism of Jewish values and tradition"
- to attract and engage the "marginally affiliated" by generating change in gateway institutions such as synagogues, Jewish Community Centers, schools, camps, and Hillels

Objectives of the Grants Program:

- to provide resources to Jewish institutions in the New York Jewish community, with an emphasis on Jewish education and identity development
- to catalyze change in Jewish institutions (including, but not limited to synagogues)
- to generate institutional growth at the grassroots level
- to get Jewish institutions to think strategically about how they want to look in the future
- to transform synagogues and other Jewish institutions into more compelling and dynamic communities of Jewish living and learning
- to have a positive impact on the attitudes and behaviors of individuals in Jewish institutions ("What's the use of institutional change without individual change?! If there is no individual change, why are we doing all of these change projects?")
- to catalyze change in the UJA-Federation of New York and the New York Jewish community

Description of Change Project (the project's vision of synagogue life & the project's change process/"how it works"):

The Grants Program of the Jewish Continuity Commission funds institution-wide initiatives, as opposed to programs. It is premised on the belief that institutions know best how to transform themselves into compelling dynamic Jewish communities. It assumes that what is a 'good' initiative for one synagogue may not be suitable for another synagogue since each institution is located in a particular context in terms of demographics, socioeconomics, lay and professional resources, and the life cycle of the organization. Thus, the Commission does not provide a specific template of change; each institution is required to undergo a serious strategic planning process which takes into account its unique institutional profile, strengths, and weaknesses. Furthermore, the synagogues' (and other Jewish institutions') lay and professional leaders are required to develop and buy into their own vision of

change and to identify their own creative and bold initiatives. It should be noted, however, that the Commission conducts public briefings every year regarding both the content and process of change, providing institutions with guidelines and concrete suggestions regarding possible substantive areas of focus.

For initiatives beginning in July, the Continuity Commission circulates a Request for Proposals (RFP) to all of the Federation's network agencies and synagogues (within and beyond the network) by September of the previous year. For the first four years of the Grants Program, the grants were defined by institutional or target-population categories. In 1997, the Continuity Commission decided to eliminate the target-population category because it was felt that these initiatives were more programmatic and that the institutional grants were more strategic in nature. Furthermore, for initiatives beginning in July, 1998, the RFP invited applicants to define their initiatives by one of the following "content-based goals or strategies of change":

- "Toward a Spiritual Community"
- "Toward an Inclusive Community"
- "Toward a Learning Community"
- "Toward Renewing Israel's Role in the Life of a Community"
- "Toward Enriching Jewish Culture in a Community"
- "Toward a Social Action Oriented Community"

For the first four years of the Grants Program (1994/1995, 1995/1996, 1996/1997, and 1997/1998), the Continuity Commission awarded three-year grants that followed the following 'formula' for large-scale institutional grant initiatives (with slightly lower figures for target-population grant initiatives):

- Year 1: up to \$60,000 per initiative (100% funding)
- Year 2: up to \$48,000 per initiative (80% funding)
- Year 3: up to \$30,000 per initiative (50% funding)

For initiatives beginning in July 1998 (1998/1999), the Continuity Commission awarded four-year grants that followed the new 'formula':

- Year 1: up to \$48,000 per synagogue (80% funding)
- Year 2: up to \$60,000 per initiative (100% funding)
- Year 3: up to \$36,000 per initiative (60% funding)
- Year 4: up to \$24,000 per initiative (40% funding)

This revised funding strategy was based on learning from Lilmod U'Lelemed: To Learn and To Teach- Volume One (1997), the Continuity Commission's mid-year report, which indicated that three years was too short a time frame for institutionalizing change, even in the best of circumstances. The revision was also a reaction to the realization that too many institutions felt pressured to go into full implementation during year 1 because of the 100% funding that used to be awarded up front; having only 80% funding for year 1 now enables institutions to spend

much of the first year in planning activities such as needs assessment, community conversations, and piloting.

In each of the past 5 years, the Continuity Commission awarded grants to approximately 20 new initiatives per year (in addition to continuing funding of renewal initiatives). As of 1998, the Continuity Commission awarded grants to 90 initiatives, representing 88 distinct institutions.

History of Change Project (when it started, who started it, etc.):

The Continuity Commission was established in July, 1993, in direct response to UJA-Federation of New York's Strategic Plan. A key recommendation of the Strategic Plan was to increase resources in the area of Jewish education and identity development in the New York Jewish community. In 1993, the Continuity Commission had the following 3 components under its auspices: The Grants Program, Israel Experience, and research (e.g. Connections and Journeys conducted by Bethamie Horowitz). In 1998, a fourth focus was added to the Commission when it joined Steinhardt's national day school initiative, Partnership for Excellence in Jewish Education. The first initiatives of the Grants Program began to be implemented in 1994/1995.

Synagogue Selection Process (how synagogues were selected to participate):

All network agencies of the UJA-Federation of New York, non-network agencies, and synagogues in the greater New York area are invited to apply for Continuity Commission grants (non-synagogue institutions include JCCs, Hillels, BJE, and JBFCs). Every September, a Request for Proposal (RFP) is distributed to all of these institutions. For initiatives scheduled to begin in July, 1998, grant applications were due in December, 1997. Institutions which were selected as finalists were interviewed by a small group of Commission members in February and March, 1998. All institutions were notified of their status by May, 1998. Since the creation of the Continuity Commission, over 100 synagogues applied for grants; approximately 25% of these applicants received grants.

Based on lessons learned from the first four years of the Grants Program, the "4 C's" are the main criteria for selecting synagogues (and other institutions) to be grant recipients:

- 1) Clarity of vision (clear picture of what the institution will look like in 5 years articulated clearly by the lead professional)
- 2) Commitment to change that is widespread and deep throughout the institution (including the buy-in of the lead professional at the synagogue)
- 3) Capacity to implement change
- 4) Content (an initiative with clear content; an initiative that clearly conveys: "This is what the change is going to be about. This is what individual congregants are going to exude, understand, and transmit")
(e.g. "In order to become a Kehillah Kedoshah, we want to take the following 3 steps" instead of "We want to change because we're losing members").

From its inception, the Continuity Commission was especially interested in funding initiatives that focused on the "intermediate group" of "marginally affiliated" Jews (e.g. people who are synagogue members but who are only intermittently involved).

Role of outside consultants: n/a

Role of outside organization: The Continuity Commission creates and establishes the Requests for Proposals (RFP's), reviews the RFP's, conducts the interviews with representatives of finalist institutions, decides which initiatives will receive funding, and is in contact with each institution for follow-up and evaluation following receipt of the grant.

How it is funded: UJA-Federation Continuity Commission, which received funds from the UJA-Federation of New York's annual campaign. In 1998/1999, \$3.5 million was allocated to the Continuity Commission from the \$120 million annual campaign.

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 3

Title of Synagogue Change Project: Grants Program of the Jewish Continuity Commission of the UJA-Federation of New York

Definitions of "Success":

"Successful" diffusion of the initiative in the institution

(from Lilmod U'LeLamed-Volume One- p. ii):

- adoption of the initiative/innovation: taking root initially
- implementation of the initiative/innovation: thriving & managing change during the period of the grant
- institutionalization of the initiative/innovation: sustaining momentum beyond the grant period

Indicators of "successful" synagogue initiatives

(from Lilmod U'LeLamed-Volume One- p. 17):

- increased financial support & participation by volunteer synagogue leadership
- expanded synagogue membership
- increased rates & intensity of participation in synagogue life & membership
- more dynamic synagogue culture

Note: These are all possible indicators of success which reflect a cultural shift in synagogues. However, not all synagogues are interested in achieving all of these goals; these four things do not all need to be in place for a synagogue initiative to be considered "successful".

Other definitions of "success" culled from Lilmod U'LeLamed-Volume One

- successful integration of the initiative into the institution's culture (pp.2,8)
- ease of implementation and institutionalization (pp. ii, 3, 4)
- sustaining the innovation (p.6)
- ability to offer enhanced programs (p.8, 10, 13)
- successful adaptation of the change/innovation, including an ability to weather staff turnover (pp. ii, 12,13)

More ultimate definitions of "success" (based on interview notes):

- "success" at the institutional level: programs being transformative for the synagogue as a whole; programs successfully "turning the boat around".
- "success" at the institutional level: synagogues being transformed into more compelling, dynamic, and vibrant communities of Jewish living and learning
- "success" at the institutional level: initiatives being so successfully integrated into synagogue life that they are "in the blood stream" of the institution

- "success" at the individual level: individuals' lives being transformed; individuals connecting to their Jewishness through their involvement at the synagogue:

Unless there's a magic that individuals can experience & bring them closer to their Judaism, we haven't painted a picture of success. It's about individuals connecting to their Jewishness. We believe that it has to happen through communities, which we define as institutional settings. All of the other stuff (definitions of success) are the "enablers". We want institutional change in order so that people can experience the power of Judaism. All of that stuff defines successful change for the institution, but institutional change is not an ends, it's a means to success. Change for what? Institutional change is still just a means to a greater end-connection to Jewish life for individuals.

Title of Synagogue Change Project: Grants Program of the Jewish Continuity Commission of the UJA-Federation of New York

Perceived Outcomes to Date ("What's Happening?"):

Outcomes have not yet been evaluated. Program evaluators at UJA-Federation sent out a survey to all grant recipients and also plan to randomly interview people from 10 institutions (including some synagogues).

Title of Synagogue Change Project: Grants Program of the Jewish Continuity Commission of the UJA-Federation of New York

Hunches Re: Factors Linked to "Success":

1) CHARACTERISTICS OF SYNAGOGUES:

The same "4 C's" which are the criteria for selecting institutions to be grant recipients can also be considered to be factors linked to successful institutional change processes. In fact, the reason why the Continuity Commission now uses the "4 C's" as selection criteria is because of the belief that these "4 C's" are conducive to the success of the initiatives:

1) Clarity of vision (clear picture of what the institution will look like in 5 years articulated clearly by the lead professional)

2) Commitment to change that is widespread and deep throughout the institution (including the buy-in of the lead professional at the synagogue)

3) Capacity to implement change

4) Content (an initiative with clear content; an initiative that clearly conveys, "This is what the change is going to be about. This is what individual congregants are going to exude, understand, and transmit")

(e.g. "In order to become a *Kehillah Kedoshah*, we want to take the following 3 steps" instead of "We want to change because we're losing members").

One aspect of "commitment" (the second "C") that is particularly important is the support of the rabbi:

We come down pretty strongly on the lead professional, usually the rabbi, being the lead articulator of the vision...with the lay leaders' support of course. Even with school programs, we found that if the rabbi is not solidly behind the initiative, it's just going to be a school project and it won't turn the boat around.

2) CHARACTERISTICS OF THE CHANGE PROCESS:

• lay and professional leadership working together to develop and buy into an institutional vision for change

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 1

Title of Synagogue Change Project: Koret Synagogue Initiative (KSI)

Sponsoring Agency: Koret Foundation

Sources of Data (interviews and written materials):

Interviews:

- Dr. Sandra Edwards-3/31/98
- Janet Harris-12/21/97

Written Materials:

- Streicker, Joel, "Program Development & Synagogue Growth: An Assessment of the Koret Synagogue Initiative", Maurice and Marilyn Cohen Center for Modern Jewish Studies Institute for Community & Religion, Brandeis University
- Streicker, Joel & Tobin, Gary, "Enhancing Jewish Life: An Assessment of the Koret Synagogue Initiative-Executive Summary-1997", Maurice and Marilyn Cohen Center for Modern Jewish Studies Institute for Community & Religion, Brandeis University

Address and Phone # For Learning More About This Change Project:

Dr. Sandra J. Edwards, Senior Program Officer (415) 882-7740
Koret Foundation
33 New Montgomery Street, Suite 1090
San Francisco, CA 94105-4509

Sponsoring Agency Type:

- national organization
- central education agency
- federation or continuity commission
- ☒ foundation
- movement, movement-affiliated college or other organization
- individual synagogue

Type of Synagogue Change Project:

- planned total synagogue change
- planned total synagogue school change
- ☒ planned change targeted to one aspect of synagogues at a time
- 'organic' unplanned change

- national
- ☒ regional
- one synagogue

Movement affiliation of synagogues involved in this change project:

☒ Trans-denominational
☐ Orthodox
☒ Conservative
☒ Reform
☐ Reconstructionist

of Participating Synagogues: 8 total: 4 in first year; 2 in second year; 2 in third year

Location of Participating Synagogues: San Francisco Bay Area

Names & Characteristics of Participating Synagogues:

| <u>Name:</u> | <u>Location</u> | <u>Size</u> | <u>Movement</u> |
|---|---------------------|-------------|-----------------|
| <u>First Round (since 1994):</u> | | | |
| •Congregation Beth Am | Los Altos Hills, CA | large | Reform |
| •Congregation Beth Sholom | San Francisco, CA | medium | Conservative |
| •Congregation Kol Shofar | Tiburon, CA | medium | Conservative |
| •Congregation Sherith Israel | San Francisco, CA | med-large | Reform |
| <u>Second Round (since 1997):</u> | | | |
| •Congregation Beth David | Saratoga, CA | medium | Conservative |
| •Congregation Emanuel | San Francisco, CA | large | Reform |
| <u>Third Round (to begin fall, 1998):</u> | | | |
| •Peninsula Temple Sholom | Burlingame, CA | med-large | Reform |
| •Temple Sinai | Oakland, CA | med-large | Reform |

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 2

Title of Synagogue Change Project: Koret Synagogue Initiative (KSI)

Objectives of Project:

Immediate Goal: to "test the hypothesis" that the addition of a program director (or assistant rabbi) would enable each of the participating synagogues to do a much better job of strengthening its members' and non-members' Jewish identity and commitment, "thereby demonstrating that synagogues can play a critical role in the revitalization of Jewish life in America".

Short-Term Goals:

- to build capacity in synagogues through the addition of a program director (or assistant rabbi) on staff
- to provide a vehicle for institutional transformation
- to enable synagogues to reach their potential for positively affecting Jews' lives by virtue of its three key roles: community-building, religious life, and education
- to make structural changes in the synagogue as an institution by changing the culture of the synagogue and its leadership
- to engage a broader spectrum of congregants in congregational life (e.g. to change the equation away from its current status of 20% active and 80% passive membership)
- to involve and deepen the Jewish identity of congregants
- to attract new members to synagogues

Long-Term Goals:

- to enable the synagogue to become an agent of change for the San Francisco Jewish community at large
- to enable the synagogue to assume its place with other Jewish organizations in promoting Jewish continuity and strengthening Jewish identity
- to serve as a national model so that funders can see how even a relatively small amount of money can make a big difference in how synagogues function

Description of Change Project (the project's vision of synagogue life & the project's change process/"how it works"):

The KSI provides funding for participating synagogues to hire full-time program directors (or assistant rabbis for synagogues in the second and third rounds) to develop and implement programs aimed at building the Jewish identity and commitment of targeted segments of the synagogue population (such as young adults, women, families, etc.). Program directors aim to enhance synagogue life and promote synagogue change through the implementation of outreach and inreach programs. Koret's vision is "more of a process vision", premised on the assumption that synagogues will do a better job of enhancing congregants' Jewish identity with increased personnel capacity and with the addition of a program director position on staff who is focused on a work plan with defined target groups

and activities. Koret does not dictate the kind of programming that each synagogue should implement.

Each synagogue's program director is required to submit a work plan and to meet monthly with the other program directors and the manager of the Koret Synagogue Initiative, Sandra Edwards. Koret staff also meet with individual synagogues' rabbis and program directors on an as-needed basis in an effort to provide technical assistance to the project. In addition, Michael Papo (Executive Director of the Koret Foundation), Sandy Edwards (Senior Program Officer of the Koret Foundation) and researcher Gary Tobin attend board meetings at participating synagogues approximately once a year, with the purpose of informing synagogue lay leaders about the KSI and raising awareness about the initiative. Most participating synagogues have some type of lay advisory committee which oversees the work of the program director.

Beginning in the fall of 1998, the KSI will expand. With the help of a new staff person at the Koret Foundation, the following activities will be initiated:

- management consultation, training, and technical assistance to synagogues
- inter-synagogue programming and new resource development
- sharing of experiences resulting from KSI
- providing a forum for leaders of Bay Area synagogues to speak with each other about issues of common concern
- facilitating replication of KSI both locally and nationally
- strengthening and enhancing the work of synagogues in the Bay Area Jewish community
- outreach to synagogues currently not participating in the KSI

History of Change Project (when it started, who started it, etc.):

The Koret Foundation initiated the Koret Synagogue Initiative in 1994. Prior to 1994, Koret functioned mainly as a foundation that reviewed grant proposals and funded various projects in Jewish institutions and other non-profit organizations; all of these projects were implemented by the organizations themselves. The KSI is part of a new-initiative approach by the Koret Foundation to become more proactive regarding specific areas of interest, such as Jewish identity; KSI was initiated by Koret and is coordinated by a Koret staff person. Koret's decisions to "get into the synagogue change business" was motivated by the realization (of Koret's board and staff) that the synagogue was a neglected institution in the community. While "Jewish identity" and "continuity" were buzz words in the San Francisco Jewish community, as they were around the country, the synagogue seemed to be the one Jewish institution that was not engaged in meeting these objectives. Koret board members and staff were further motivated by a desire to close the gap between the San Francisco Jewish Community Federation and the synagogue in a community where there was a 'church/state separation' between the federation and the synagogue.

Synagogue Selection Process (how synagogues were selected to participate):

An in-house team of Koret professionals and lay leaders selected synagogues that it thought could successfully implement the KSI. The four synagogues that were selected the first time around (1994) were ones with "strong rabbis" who were likely to remain in their current positions for at least three years. In addition, the four synagogues represented a mix of Conservative and Reform congregations from different geographic regions in the San Francisco Bay Area (the city, the Peninsula, and Marin County).

Role of outside consultants: Michael Papo, Koret's Executive Director and Sandy Edwards, Koret's Senior Program Officer, are the main liaisons to each synagogue's program director and rabbi. Mel Mogoluf, a Koret consultant, did some upfront research (before the first four synagogues were selected in 1994) such as interviewing various Bay Area rabbis to assess their synagogues' fit for the KSI.

Role of outside organizations: Koret provides partial funding for the program director position and for programming in each synagogue. A Koret staff member (Sandy Edwards) also convenes monthly meetings of the program directors and meets with individual synagogues' rabbis and program directors in an effort to provide technical assistance to the project on an as-needed basis.

How it is funded:

First round of synagogues (those that began in 1994):

In years 1-3, Koret provided approximately \$45,000 per year per synagogue for the program director's salary (including a cost-of-living salary increase every year) and a programming and program publicity budget, while each synagogue provided matching funds in the amount of \$15,000 per year.

In years 4-6, Koret continued to provide funding to the synagogues, but at a decreasing rate.

In year 7, the entire budget for the program director, programs, and publicity, is supposed to be funded by the synagogue.

Unlike the other three synagogues that began the KSI in 1994, Kol Shofar hired a half-time program director whose funding was provided by the Marin Community Foundation.

Second round of synagogues (those that began in 1997):

In years 1-3, Koret provided \$22,000 per year per synagogue for the half-time program director's salary (including a cost-of-living salary increase every year) and a programming budget, while each synagogue provided matching funds in the amount of \$12,000 per year.

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 3

Title of Synagogue Change Project: Koret Synagogue Initiative (KSI)

Definitions of "Success":

- implementing more programs in synagogues
- involving more people in synagogue programs
- involving people more deeply in synagogue life, so that individuals "get more out of the synagogue" than when they started
- enhancing participants' Jewish identity
- enabling synagogues to "see the big picture"
- changing the congregation's understanding of itself:
enabling each synagogue to have a clearer understanding of its mission and vision and what it wants to offer its congregants (in whatever arena it chooses to focus)
- growth: increase in synagogue membership

Title of Synagogue Change Project: Koret Synagogue Initiative (KSI)

Perceived Outcomes to Date ("What's Happening?"):

1) IMPLEMENTATION:

- By definition, all of the synagogues have program directors.
- All of the program directors have written workplans.
- All of the program directors attend monthly Koret meetings.
- Most participating synagogues have some type of lay advisory committee which oversees the work of the program director.

- "The fact that they've had an additional synagogue staff person really works."
- The program directors introduced many new programs to each of the participating synagogues:
 - Beth Am: programs focused on family education and community-building; programs focused on inreach to existing members; Specific programs include the Shabbaton Family Education Program alternative to the Sunday morning supplementary religious education program.
 - Beth Sholom: programs focused on worship and education; programs focused on inreach and outreach; Specific programs include B'raisheet monthly family pre-school program, Munchkins & Mishpacha Shabbat Program for families with infants and toddlers, Circle Minyan alternative service, meditation before minyan, many programs for young adults, a Women's Rosh Chodesh Group, and retreats.
 - Sherith Israel: programs focused on educational and social activities; programs focused on outreach; Specific programs include the establishment of 18 havurot, the development of a havurah resource guide, many programs for young adults, including Talking Tachlis (a discussion group on Jewish issues).
 - Kol Shofar: programs focused on combining education, socialization, and worship; programs focused on inreach and outreach; Specific programs include Saturday Night at the Synagogue, Teshuvah Nights High Holyday workshops, an Empty Nesters group, and the Neshama Minyan alternative service.

2)IMPACT:

- Half (2/4) of the synagogues from the first round experienced membership growth since the program director position was added to the staff. While not all of this growth can be attributed to the KSI, more than half of the new members have participated in KSI programs at the synagogue.

- Some of the congregants who became actively involved in KSI programs have become synagogue board members.

- Some KSI programs have become part of the culture of the synagogues and now define "who they are" as congregations (e.g. Beth Am's Shabbaton Family Education Program and Kol Shofar's Saturday Night at the Synagogue).

- Some KSI programs have catalyzed structural changes in the synagogues (e.g. Beth Sholom's pre-school programs facilitated the foundation of the Jewish Family Pre-School; Beth Am's education programs led to the desire to add an adult educator staff position).

- Some perceived impact outcomes highlighted in Joel Streicker and Gary Tobin's written assessment of the KSI in 1997:

- Impact on Individuals:

- The KSI has affected a wide and diverse audience of participants including families with school-aged children, young single adults, seniors, empty nesters, and women.

- While the impact on individuals varies from program to program, the KSI project's accomplishments include extending and enriching participants' knowledge of Judaism and Jewish culture; enhancing feelings of being part of a Jewish community; and strengthening identification with Judaism, the Jewish people, and the synagogue.

- The most intense impact on participants' ritual observance and spiritual life occurred in programs that attempted to engage participants in spiritual experience or ritual observance.

- Impact on Synagogues as Institutions:

- The KSI has had a significant impact on the programming, culture, and structure of the synagogues.

- The synagogues have greatly expanded their program offerings, and, as a result, more individuals have participated in synagogue activities. KSI programs has increased the activity and involvement of synagogue members and has attracted new members to the participating synagogues as well.

- The KSI has led to "cultural shifts" in participating synagogues, such as the sense by participants that the synagogue is an embracing, receptive community.

- The main structural changes stimulated by the KSI are the assumption of synagogue leadership positions by program participants and the creation of new institutional forms to accommodate diversity (e.g. new subcommunities or havurot based on shared demographics).

- The KSI has had a greater institutional impact on the synagogues in which the role of the program director was integrated into a well-thought-out plan for congregational transformation. Some of the program directors were more integrated into their synagogues than others.

Title of Synagogue Change Project: Koret Synagogue Initiative (KSI)

Hunches Re: Factors Linked to "Success":

1) CHARACTERISTICS OF SYNAGOGUES:

• buy-in by synagogue staff and lay leaders

("An outside entity like a Foundation or the Federation can provide momentum, but until staff and lay leaders at the synagogues buy-in, it is not really going to happen")

• synagogues that are effectively and professionally run with respect to "business stuff" (office staff support, dues structure, Bulletin coming out on time, good process for counting membership units, process for integrating new members)

("A structural barrier to success is that some synagogues aren't run very effectively... If they don't have the support of the office staff, etc....")

• the role of the rabbi is important (but not sure about what the ideal role should be) ("We picked synagogues that had strong rabbis who determine what goes on in their congregation and are pretty focused on that.. That was a good criterion because it means that rabbis are very invested in the project. However, the rabbi can also be a barrier if the program director has a different vision.. That could be a problem..")

• strategic planning in synagogues enables their Program Directors to be more focused

2) CHARACTERISTICS OF THE CHANGE PROCESS:

• KSI's underlying theory of change: "Synagogues need more staff capacity in order to be able to make things happen"

• "outside momentum": impetus of outside entity (Koret)

• status associated with the Koret Foundation and being awarded grants for hiring Program Directors

• teams of lay leaders and professional staff coming together (like Synagogue 2000)

• on-site advisory committee (people to whom the program director can go to get input)

• strategic planning in synagogues enables their Program Directors to be more focused

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 1

Title of Synagogue Change Project: McKinsey/UJA-Federation Strategic Planning Workshops for Synagogues

Sponsoring Agency: McKinsey & Company consulting firm and UJA-Federation of Jewish Philanthropies of New York

Sources of Data (interviews & written materials):

Interviews:

- Karen Barth-12/23/97
- Robert Waitman-3/4/98

Written Materials:

- "Achieving Transformational Change in Synagogues"-UJA-Federation of NY-Presentation to Continuity Commission-January 23, 1996
- Memorandum RE: Attached Outreach Letter and Materials 5/21/97-
FROM: Jill Mendelson-TO: Chris Nounou and Mark Shapiro

Address and Phone # For Learning More About This Change Project:

Robert Waitman (212) 446-8141

McKinsey & Company
55 E. 52nd Street-17th floor
New York, NY 10022

Jill Mendelson, (212) 836-1648
Director of Management Assistance Program
UJA-Federation of Jewish Philanthropies of New York
130 East 59th Street
New York, NY 10022

Sponsoring Agency Type:

- national organization
- central education agency
- ☒ federation or continuity commission
- foundation
- movement, movement-affiliated college or other organization
- individual synagogue
- ☒ private corporation (pro-bono work)

Type of Synagogue Change Project:

- ☒ planned total synagogue change
- ☐ planned total synagogue school change
- ☐ planned change targeted to one aspect of synagogues at a time
- ☐ 'organic' unplanned change

- ☐ national
- ☒ regional
- ☐ one synagogue

Movement affiliation of synagogues involved in this change project:

- ☒ Trans-denominational
- ☒ Orthodox
- ☒ Conservative
- ☒ Reform
- ☒ Reconstructionist

of Participating Synagogues:

- Year 1 (1994): 11 at the beginning of the year; 9 continued for the whole year
- Year 2 (1996/1997): 7 at the beginning of the year; 6 continued for the whole year
- Year 3 (1997/1998): 7

Names & Characteristics of Participating Synagogues:

Year 1 (1994): (Which 2 synagogues dropped out during the year?)

| <u>Name</u> | <u>Location</u> | <u>Size</u> | <u>Movement</u> |
|---------------------------------------|-----------------|--------------|-------------------------------|
| • Congregation B'nai Jeshurun | Manhattan | 1335 members | unaffiliated/ Conservative |
| • Elmont Jewish Center | Queens? | 100 members | Orthodox |
| • Forest Hills Jewish Center | Queens | 500 members | Conservative |
| • Jewish Community Center of Harrison | location? | 500 members | Conservative |
| • Kehillath Shalom | Huntington | 188 members | Reconstructionist |
| • North Country Reform | Glen Cove | 300 members | Reform |
| • Park Slope Jewish Center | Brooklyn | 150 members | Conservative |
| • Reform Temple of Forest Hills | Queens | 500+ members | Reform |
| • Temple Beth Sholom | Roslyn | 1000 members | Conservative |
| • West End Synagogue | Manhattan | 200 member | Reconstructionist |
| • Young Israel of Scarsdale | Scarsdale | 500 members | Orthodox |

Year 2 (1996/1997): (Which synagogue dropped out during the year?)

| <u>Name</u> | <u>Location</u> | <u>Size</u> | <u>Movement</u> |
|-----------------------------------|-----------------|--------------|------------------------------|
| • Bet Am Shalom Synagogue | White Plains | 336 members | Reconstructionist |
| • Congregation Beth Simchat Torah | Manhattan? | 800 members | Conservative/ Traditional |
| • Genesis Agudas Achim | Tuckahoe | 147 members | Conservative |
| • Plainview Jewish Center | Plainview | 810 members | Conservative |
| • South Huntington Jewish Center | Melville | 385 members | Conservative |
| • Temple Beth-El of Great Neck | Great Neck | 1450 members | Reform |
| • Westchester Jewish Center | Mamaroneck | 450 members | Conservative |

Year 3 (1997/1998):

| <u>Name</u> | <u>Location</u> | <u>Size</u> | <u>Movement</u> |
|-----------------------------|-----------------|---------------|-----------------|
| • Beth Israel | Port Washington | 200 members | Conservative |
| • Dix Hills | Dix Hills | 600 members | Conservative |
| • Hebrew Institute | White Plains | 230 members | Orthodox |
| • Lincoln Square | Manhattan | 900 members | Orthodox |
| • Rodeph Shalom | Manhattan | 1,100 members | Reform |
| • Town and Village | Manhattan | 400 members | Conservative |
| • Young Israel of Oceanside | Oceanside | ? # members | Orthodox |

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 2

Title of Synagogue Change Project: McKinsey/UJA-Federation Strategic Planning Workshops for Synagogues

Objectives of Project:

- long-term goal: to help ensure ongoing Jewish continuity and Jewish community
- short-term goal: to re-establish the synagogue as a vibrant center of Jewish living and learning
- short-term goal: to restore the synagogue to its central position as a builder of Jewish affiliation and Jewish identity
- immediate goal: to overcome barriers to change within synagogues (e.g. making synagogue leadership aware of the need for change; gaining consensus among clergy, lay leaders, and other congregants; creating adequate administrative infrastructure for the change; and ensuring economic support for new initiatives).

Description of Change Project (the project's vision of synagogue life & the project's change process/"how it works"):

The McKinsey project does not define what it means to be "a vibrant center of Jewish living and learning"; it defines a "value-neutral" process for enabling synagogues to achieve their own site-specific visions rather than utilizing a "cookbook approach" or imposing a specific change agenda. The process is modeled after McKinsey's strategic planning process for its other clients. Based on learning from its consulting work with clients in the business world, McKinsey's strategic planning process incorporates the following elements: working in teams, learning by doing, skilled facilitation, focusing on vision and objectives, and maintaining high energy throughout the process.

Approximately once per month over the course of a year, participating synagogue teams (consisting of the rabbi, administrator, and 3-4 lay leaders) attend 9 workshops with McKinsey consultants and other participating synagogue teams from 6-8:30 PM. Each meeting starts out with a 20-30 minute session for all of the teams together, during which the topic for the evening is introduced. Then, the participants go into break-out sessions for approximately an hour, during which each individual synagogue team meets with its assigned McKinsey facilitator. The last segment of the meeting is another 20-30 minute session for the whole group, to give the different synagogue teams an opportunity to "cross-pollenate" and share ideas. The main program sessions are each devoted to one of the following topics:

- 1) Setting a mission: developing a mission statement and guiding principles
- 2) Understanding the "market": situation analysis and synthesis
- 3) Laying out a strategy
 - a) Drafting a vision
 - b) Developing a strategy
 - c) Designing strategic initiatives
- 4) Deciding how to fund the strategy: budgeting and fund-raising

- 5) Action planning
- 6) Reporting back to the other synagogue teams

Between each session that is facilitated by McKinsey consultants, each synagogue team is expected to meet on its own and to do some on-site work related to the previous program session's topic. For example, after the session on "understanding the market", participating synagogue teams are expected to conduct focus groups with board members and congregants.

History of Change Project (when it started, who started it, etc.):

This project was initiated in 1993 by Karen Barth, who was then a consultant for McKinsey and Company, after some discussions with Hillel Friedman and John Ruskay of the UJA-Federation of New York's Continuity Commission. Originally, the federation approached Karen requesting that McKinsey conduct a one-day workshop on strategic planning for synagogues; Karen agreed, with the condition that each synagogue commit to participate for one year's worth of meetings and assignments. In the first year of the implementation of this project, ten McKinsey consultants volunteered their time to this pro-bono project. The first group of synagogues participated in strategic planning workshops during the calendar year 1994. The next group of synagogues participated in workshops during the academic year 1996/1997. The third group of synagogues participated during the academic year 1997/1998.

Synagogue Selection Process (how synagogues were selected to participate):

In this project's first year, there was no formal selection process. Beginning in 1996, McKinsey and the Federation initiated an application process. All synagogues in the New York metropolitan area that are under the auspices of UJA-Federation of New York are invited to apply to participate. Synagogues are each sent an application form, along with a cover letter describing the project from staff at the UJA-Federation and Continuity Commission. In 1996, 10 synagogues applied and 6 were selected. The selection criteria included: having a committed group of professional and lay leaders who are dedicated to ongoing participation in the strategic planning process over the course of the year, and not having a "burning issue" at the synagogue that could detract from the strategic planning process (e.g. raising funds for a new building or undergoing a transition towards becoming egalitarian).

Role of outside consultants: One to three McKinsey consultants are assigned to each synagogue, to conduct the break-out sessions at each workshop and to be "on call" for phone consultations throughout the year on an as-needed basis. Because of McKinsey consultants' hectic travel schedules, there are often logistical difficulties with the consultants' availability to their synagogue teams. Having more than one consultant assigned to a synagogue increases the likelihood of synagogue teams being able to contact a consultant (albeit not necessarily the same one every time).

Role of outside organization: McKinsey provides the consultants and organizes the 'curriculum' of the strategic planning workshops. UJA-Federation's Continuity Commission is the "facilitating arm" of the project; it publicizes the project to local synagogues, recruits synagogues to participate, helps McKinsey identify potential synagogue participants, and organizes the logistics of each workshop/meeting.

How it is funded: McKinsey consultants donate their time. Participating synagogues each pay \$700 to cover the cost of meals and materials for its team for the year.

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 3

Title of Synagogue Change Project: McKinsey/UJA-Federation Strategic Planning Workshops for Synagogues

Definitions of "Success":

1) IMPLEMENTATION:

- synagogues successfully completing the strategic planning process
- a synagogue's ability to launch a series of new initiatives as a result of the strategic planning process
- increased level of activity within each participating synagogue
- "sustained positive activity for the better" in participating synagogues

2) IMPACT:

- "positive impact on the synagogue community over the long haul"
- synagogues attaining their own self-defined measurable goals
(e.g. If a synagogue's vision is to have 100 people attend Shabbat morning services and they achieve that goal, that is success for that synagogue).
- improved sense of Jewish community in the synagogue
- "improved Jewish continuity" in synagogues

Title of Synagogue Change Project: McKinsey/UJA-Federation Strategic Planning Workshops for Synagogues

Perceived Outcomes to Date ("What's Happening?"):

1) **IMPLEMENTATION:**

2) **IMPACT:**

Outcomes reported after the first year's implementation of the project (in the report Achieving Transformational Change in Synagogues: Presentation to Continuity Commission-January 23, 1996):

- Most synagogues successfully completed the program: 7 of the 11 completed strategic plans, most of which involved substantial changes from current initiatives; 2 synagogues attended the full program and claimed to have benefited from it even though they did not complete a strategic plan by the end of the year; 2 synagogues dropped out.
- Extraordinary levels of activity at most synagogues: All synagogues held focus groups with members; One synagogue held 15 focus groups; Many synagogues held "town meetings" to discuss the mission statement.
- Generally positive feedback from the program: perception of benefit; willingness to recommend the program to others.
- Some negative feedback: lack of clarity about what the final product was supposed to be; participants felt that more "content" would have been helpful (e.g. best practice examples); schedule was too fast-paced; business terms were sometimes vague.
- Positive signs of impact based on early indicators and self-assessment by synagogues

Title of Synagogue Change Project: McKinsey/UJA-Federation Strategic Planning Workshops for Synagogues

Hunches Re: Factors Linked to "Success":

1) CHARACTERISTICS OF SYNAGOGUES:

- having a group of people in the synagogue who want to change and who are heading in the right direction ("change readiness")
- leadership must be committed to change effort

2) CHARACTERISTICS OF THE CHANGE PROCESS:

- continuity of facilitator & continuity of synagogue leaders
 - the discipline of the process that forces synagogues to reach conclusions (i.e. having a timetable that forces decisions to get made)
 - having a skilled facilitator who helps bring people to closure & who helps clients reach solutions
(McKinsey consultants guide the process rather than doing the work themselves)
 - having an outside presence (consultant) who is removed from the day to day history and politics of each synagogue)
 - cookbook approaches to change don't work
 - approach should be based on learning (from each other) by doing
 - teams doing real work together are key instruments of change
 - change process needs to be inclusive and to integrate differing viewpoints
 - leadership
 - actual and potential members (bottom-up)
 - lay and spiritual (cross-functional)
 - change process must embody the changed values and behaviors
(e.g. listening, collective decision-making)
(*"The medium is the message"*?)
 - self-reflection & continuous improvement of process:
(e.g.) learned in Year 1 that it was better to have the same facilitator work with synagogues throughout the year, so adapted the process accordingly)
-

From "Achieving Transformational Change in Synagogues"
(presentation to UJA-Federation of New York's Continuity Commission-
January 23, 1996):

Principles for Successful Synagogue Change:

- The objective is results (not change activities)
 - Should provide a compelling benefit to the community
 - Should reflect high, but achievable, aspirations
 - Should be measurable
- Change needs to be inclusive and to integrate differing viewpoints
 - Leadership
 - Actual and potential members (bottom-up)
 - Lay and spiritual (cross-functional)
- Change process must embody the changed values and behaviors
(e.g. listening, collective decision-making)
(*"The medium is the message"?*)
- Change-readiness is essential prerequisite
(*distinction between "readiness" as prerequisite vs. a set of steps or procedures to prepare people for the next steps in the process a la KAB & ECE*)
- Leadership must be committed to change effort
- Teams doing real work together are key instruments of change
- Approach should be based on learning (from each other) by doing
- Energy must be maintained through focus on the objective
 - Cut lower-priority activities
 - "Syndicate" the change mission
- Each change mission is unique: cookbook approaches don't work
- Skilled facilitation (internal or external) is very important

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 1

Title of Synagogue Change Project: Orthodox Caucus L.E.A.D. (Leadership Education And Development) Rabbinic Fellowship Program

Sponsoring Agency: Orthodox Caucus, in collaboration with the Rabbinical Council of America (RCA) , and the Rabbi Isaac Elchanan Theological Seminary at Yeshiva University.

Sources of Data (interviews and written materials):

Interviews:

Dr. David Schnall-5/22/98, 6/5/98, & 7/8/98

Address and Phone # For Learning More About This Change Project:

Dr. David Schnall, (212) 960-5432
Herbert Schiff Professor of Management and Administration,
Wurzweiler School of Social Work,
Yeshiva University
Belfer Hall 1205
500 W. 185th Street
New York, NY 10033

Sponsoring Agency Type:

- ☒ national organization
- ☐ central education agency
- ☐ federation or continuity commission
- ☐ foundation
- ☒ movement, movement-affiliated college or other organization
- ☐ individual synagogue

Type of Synagogue Change Project:

- ☐ planned total synagogue change
- ☐ planned total synagogue school change
- ☒ planned change targeted to one aspect of synagogues at a time
- ☐ 'organic' unplanned change

- ☒ national
- ☐ regional
- ☐ one synagogue

Movement affiliation of synagogues involved in this change project:

- ☐ Trans-denominational
- ☒ Orthodox
- ☐ Conservative
- ☐ Reform
- ☐ Reconstructionist

of Participating Synagogues: 15

Names & Characteristics of Participating Synagogues:

For confidentiality reasons, the specific names and characteristics of the participating synagogues are being omitted in this document. Of the 15 participating synagogues, 2 are in Canada and the rest are in the United States. Of the 13 American synagogues, 7 are in New York (Long Island, Manhattan, Queens, Upstate New York, and Westchester); the other 6 American synagogues are in other states on the East Coast, the Mid-West, and the West Coast. All participating synagogues are Orthodox.

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 2

Title of Synagogue Change Project: Orthodox Caucus L.E.A.D. (Leadership Education And Development) Rabbinic Fellowship Program

Objectives of Project:

- to develop "leadership" and "vision" among younger Orthodox rabbis (most of whom are within the first 10 years of their rabbinic careers) through project-based training:
 - "leadership": ability to inspire collaboration
 - "vision": ability to develop and express new and creative responses to contemporary problems facing the American Jewish community
- to develop a core of rabbinic leaders who can serve as mentors to other rabbis
- to have an impact on national rabbinic and lay leaders in Orthodox organizations (e.g. to change policy in the Orthodox movement by bringing some younger rabbis into leadership positions in Orthodox organizations)

Operational Objectives

- to provide formal in-service training to rabbis based on well-known leadership development models in business and the military
- to implement projects in the synagogue and in the local Jewish community which would serve as a training "laboratory" for the participating rabbis
- to create a professional esprit between and among the participating rabbis (so that rabbis feel less alienated which, in turn, will "really change synagogues" because rabbis will network with each other about projects, programs, and sermons)

Description of Change Project (the project's vision of synagogue life & the project's change process/"how it works"):

The Rabbinic Fellows who participate in this program attend 4 major training sessions over the course of 2 years (one session per semester). One of the training sessions took place at the RCA national rabbinical conference in Washington, DC. Topics covered in these training sessions include: conflict management, TQM (Total Quality Management), strategic planning, change management, negotiation skills, relationship management, and communication skills. The training sessions give Rabbinic Fellows the opportunity to meet with executives from Jewish communal organizations, business executives, and senior rabbis.

All Rabbinic Fellows are required to undertake two local projects, one within their synagogues and one outside of their home congregations in collaboration with local Jewish community organizations (e.g. local JCCs, Federations, or campus groups). These projects are supposed to effect change in the synagogue and in the local Jewish community. Some examples of projects include: educational programs on domestic abuse and the establishment of an abuse hotline, Jewish educational programs accessible to the learning disabled, and educational programs targeted to FSU (former Soviet Union) immigrants.

History of Change Project (when it started, who started it, etc.):

The idea of the LEAD Rabbinic Fellowship Program was conceived in September, 1995. In February, 1996, Dr. David Schnall, a professor of management at Yeshiva University, submitted a grant proposal to the UJA-Federation of New York's Continuity Commission. Funding for the initiative began in July, 1996 and is scheduled to continue through June, 1999. The 15 rabbis who are currently Fellows in the program have committed to participate in this leadership development program for two full years, from January, 1997 to January, 1999.

Synagogue Selection Process (how synagogues were selected to participate):

All Orthodox rabbis who are graduates of the Rabbi Isaac Elchanan Theological Seminary and who are members in good standing of the RCA (Rabbinical Council of America) were invited to apply. Applications included statements of goals and objectives, as well as letters from synagogue lay leaders and from local community organizations that expressed support for the rabbis' proposed projects. The rabbis who were selected as Fellows were all in the first 10 years of their rabbinic careers.

Role of outside consultants: Dr. David Schnall, who is part of the leadership of the Orthodox Caucus and is the Herbert Schiff Professor of Management and Administration at the Wurzweiler School of Social Work at Yeshiva University, consults with each Rabbinic Fellow on an as-needed basis. A variety of other training specialists work with the Rabbinic Fellows at the professional development training sessions.

Role of outside organization: The Orthodox Caucus is an organization that was formed 5 years ago as a catalyst to span the organizational boundaries between different Orthodox organizations; it includes leaders from such organizations as Emunah Women, ADL, and Amit, in addition to some leading Orthodox rabbis. Dr. David Schnall of the Orthodox Caucus designs the curriculum for the Fellows' leadership development sessions, develops training manuals for each of the 4 seminars, publishes a newsletter directed at Orthodox lay leaders in conjunction with the Orthodox Union (which includes written contributions by some of the Rabbinic Fellows), and consults to the Rabbinic Fellows on an as-needed basis.

How it is funded: UJA-Federation of New York's Jewish Continuity Commission (3-year grant from 1996-1999), Gindi Fund for the Enhancement of the Professional Rabbinate, and financial support from the project's 3 co-sponsors (Orthodox Caucus, Rabbinical Council of America (RCA) , & the Rabbi Isaac Elchanan Theological Seminary at Yeshiva University).

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 3

Title of Synagogue Change Project: Orthodox Caucus L.E.A.D. (Leadership Education And Development) Rabbinic Fellowship Program

Definitions of "Success":

- successful implementation of Rabbinic Fellows' projects in their host synagogues and local communities

- successful achievement of the objectives of each Fellow's project

(Note: The intention of project-based management training is to implement projects with measurable outcomes, with each rabbi's project having a different definition of success depending on its particular objectives.)

- Rabbinic Fellows learning valuable lessons from the implementation of their projects that they can feed back into improving their management styles

- Rabbinic Fellows becoming mentors for other Orthodox rabbis around the country

- Rabbinic Fellows taking leadership positions in local and national Orthodox organizations

Title of Synagogue Change Project: Orthodox Caucus L.E.A.D. (Leadership Education And Development) Rabbinic Fellowship Program

Perceived Outcomes to Date ("What's Happening?"):

1) **IMPLEMENTATION:**

Most of the Rabbinic Fellows' projects have been successfully implemented in their synagogues and communities. Examples:

- community *mikvah* funded by the local Federation
- JEEP (Jewish Education and Ethics Project): free supplementary school education to children who 'show up' and whose parents participate in 4-5 weekend seminars
- collaboration with local day school: outreach and education to target newly arrived FSU (former Soviet Union) immigrants who are prime targets of local Christian missionary groups
- educational programs on infertility
- Israel-modeled *kollel*
- collaboration with national program to combat domestic abuse: abuse hotline, panel of local rabbis, retreat, educational programs
- collaboration with local university: making congregation user-friendly for people with learning disabilities
- Jewish Links program with local JCC: JCC as gateway for synagogue membership; retreats; kiosk at JCC with synagogue literature
- inreach program: "Turbo Shabbat": Carlebach Shul-type service with spirituality, song, and dance

2) **IMPACT:**

Four of the Rabbinic Fellows have taken leadership positions on the RCA (Rabbinical Council of America)

Title of Synagogue Change Project: Orthodox Caucus L.E.A.D. (Leadership Education And Development) Rabbinic Fellowship Program

Hunches Re: Factors Linked to "Success":
not ready to respond

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 1

Title of Synagogue Change Project: Partners for Synagogue Change (PSC)

Sponsoring Agency: UAHC (Union of American Hebrew Congregations)
Department of Adult Jewish Growth; Greater New York Council of Reform
Synagogues (GNYCRS)

Sources of Data (interviews and written materials):

Interviews:

- Richard Abrams, R.J.E.-6/25/98 & 7/6/98
- Randy Sheinberg-4/16/98

Written Materials:

- PSC Application Cover Sheet, Application Part 1: General Data, Application Part 2: Team Responses, and Application Part 3: Individual Responses (circulated to synagogues in 1996)
- PSC Grant Proposal (submitted to Jewish Continuity Commission of the UJA-Federation of New York for 1996/1997 grant)

Address and Phone # For Learning More About This Change Project:

Richard Abrams-PSC Director (212) 650-4087
Rabbi Peter Schaktman-Assistant Director of GNYCRS (212) 650-4190

Richard Abrams, R.J.E.
UAHC Partners for Synagogue Change (PSC)
838 5th Avenue
New York, NY 10021

Sponsoring Agency Type:

- national organization
- central education agency
- federation or continuity commission
- foundation
- _x_ movement, movement-affiliated college or other organization
- individual synagogue

Type of Synagogue Change Project:

- _x_ planned total synagogue change
- planned total synagogue school change
- _x_ planned change targeted to one aspect of synagogues at a time
- 'organic' unplanned change
- national
- _x_ regional
- one synagogue

Movement affiliation of synagogues involved in this change project:

- ☐ Trans-denominational
- ☐ Orthodox
- ☐ Conservative
- ☒ Reform
- ☐ Reconstructionist

of Participating Synagogues: 4

Names & Characteristics of Participating Synagogues:

All participating synagogues are Reform & are in Manhattan, Westchester, or Long Island.

| <u>Name</u> | <u>Location</u> | <u>Size</u> |
|---|---------------------------|-------------|
| •Congregation Kol Ami/JCC of White Plains | White Plains, Westchester | large |
| •Scarsdale Synagogue/ Tremont Temple | Scarsdale, Westchester | medium |
| •Temple Shaaray Tefila | Manhattan | large |
| •Temple Sinai of Long Island | Lawrence, Long Island | medium |

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 2

Title of Synagogue Change Project: Partners for Synagogue Change (PSC)

Objectives of Project:

- 1) to build partnerships and relationships among synagogue leaders
- 2) to develop leadership skills among synagogue professionals and lay leaders
- 3) to transform the temple leadership's job description and experience from a "corporate" model to one that embodies the values of Judaism and the religious values and purposes of their synagogues
- 4) to improve synagogue leadership as a lever for creating large-scale synagogue change

Description of Change Project (the project's vision of synagogue life & the project's change process/"how it works"):

Vision of synagogue life: a new model of synagogue board service that incorporates values-based decision-making, team-based leadership, and personal growth; synagogue governance that is more consistent with the vision of a synagogue as a nurturing covenantal community that is rooted in Jewish values; board experiences for lay leaders and professional that are more spiritual and less "corporate".

Change process: PSC engages synagogue leadership teams in three years of systematic training, supervision, and inspiration to broaden leaders' Jewish literacy, Jewish "citizenship" (lifestyle and role-modeling), spiritual awareness, individual goal-setting and management abilities. The PSC training program includes the following elements:

- observation and feedback at synagogues
- study guided by an integrated curriculum
- a series of retreats
- an ongoing facilitating/consulting process
- celebration
- evaluation

Each participating synagogue is required to assemble a team of 6-8 people, including the rabbi, the president, and present and future lay leaders. Generally, each team consists of 2 professionals and 4-6 lay leaders. Each synagogue team meets once per month with an assigned facilitator from UAHG/GNYCRS; the facilitators have expertise in areas such as organizational behavior, social work, education, and communications. The specific content of monthly team meetings varies from synagogue to synagogue. Although ECE is not formally connected to PSC, two of the facilitators have been involved in ECE; thus, all PSC synagogues are engaged in ECE activities such as visioning and community conversations. All meetings incorporate Jewish text study. While the original intention was to have two retreats per year for all participating synagogue teams, the current process has been revised to reduce the number of retreats because of the divergent needs of the synagogues involved. In addition to meeting monthly with the synagogue teams, all of the facilitators also meet once per month with Richard Abrams (Director of PSC at

UAHC), Rabbi Peter Schaktman (Director of GNYCRS), and Rabbi Julie Spitzer (Assistant Director of GNYCRS).

History of Change Project (when it started, who started it, etc.):

- 1995/1996: UAHC & GNYCRS (which used to be called NYFRS, the New York Federation of Reform Synagogues) develop and submit PSC grant proposal to the Continuity Commission of the UJA-Federation of New York. Individuals involved in writing the grant proposal include Dan Freeland of UAHC and Rabbi Julie Spitzer and John Stern of NYFRS/GNYCRS.
- Fall, 1996: UAHC & GNYCRS solicit interest from New York area synagogues in three primary geographic centers (Manhattan, Westchester, and Long Island).
- Fall and Winter, 1996: PSC curriculum begins to be developed by UAHC professional staff, consultants from the Alban Institute, and HUC faculty members.
- January, 1997: Four synagogues are accepted for participation in PSC.
- March, 1997: PSC retreat kicks off the project for the first 4 participating synagogues.

Synagogue Selection Process (how synagogues were selected to participate):

open application process for Reform synagogues in the Greater New York area, with GNYCRS congregations being informed of PSC through mailings and regional meetings.

Readiness criteria include:

- ability to commit to a three-year project
- stability of lay and professional leadership
- willingness to work openly with UAHC/NYFRS's outside consultants
- desire to empower "up and coming" leaders

Role of outside consultants: facilitator from UAHC/GNYCRS assigned to each synagogue; facilitator leads monthly meetings of synagogue leadership teams.

Role of outside organization: UAHC/GNYCRS and facilitators develop curriculum. UAHC/GNYCRS provide and assign facilitators to each synagogue. Richard Abrams' role is to support the facilitators.

How it is funded:

- Fall, 1996-Spring, 1999: pilot program funded by a \$125,000 grant from the UJA-Federation of New York's Continuity Commission
- intention is for UAHC to institutionalize the program so that by 1999/2000, it will be funded through UAHC's operating budget
- synagogue just pays for attendance at *kallot*/retreats
- part-time facilitators are paid by UAHC (originally funded by the Continuity Commission grant; now funded directly by UAHC)

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 3

Title of Synagogue Change Project: Partners for Synagogue Change (PSC)

Definitions of "Success":

"Because PSC is not focused on prayer, education, or healing, but on leadership, it's hard to define what a successful change is."

"Specific outcomes are difficult to predict, as each PSC team will be grappling with its own synagogue culture and interests, but among the transformations we (UAHC) hope to see are the following":

- short-term goals:

- synagogue leadership (lay and professional) that works together
- synagogue leaders knowing their roles and being able to 'vision' together
- "balance of power" in the synagogue between and among professional and lay leaders (e.g. not having a rabbi or president who is a "benevolent despot")
- not having decisions made by "just a few people"
- rabbis having a deepened understanding of synagogue management and new models of serving the congregation

- a "healthy" congregation that is "doing well" according to each synagogue's own definition of "doing well" (e.g. membership size and composition that is "where the leaders want it to be", attendance at services that is "where the leaders want it to be", etc.)

- growth and vitality within the synagogue, as reflected in the development of *havurot*, increases in membership, active and diverse adult engagement, and solid attendance at services

- commitment of synagogue board members to fulfill long-range plans

- heightened level of Jewish engagement at board meetings

- diminishment of personal tensions, ennui, and burn-out at board meetings

- board members remaining involved in temple life after rotating off the board

- heightened level of *avodah* (increased participation in communal worship and personal Jewish observance) and *g'milut chasadim* (increased participation in acts of social justice) among synagogue leaders

- deepened interest in and familiarity with the history and personal experiences of the synagogue and its individual members

- increased capacity for lay board members to speak in the vocabulary of Judaism

- successful fund-raising based on Jewish concepts of *tzedakah*, wealth, and blessing

- perception of board membership not as a final outcome of Jewish responsibility, but as a training ground for regional and national leadership

In one of the participating synagogues, success is a process, not an outcome: e.g.) if the synagogue leaders can articulate a vision, generate some discussion about it in the congregation, and reach a consensus.

Title of Synagogue Change Project: Partners for Synagogue Change (PSC)

Perceived Outcomes to Date ("What's Happening?"):

1) IMPLEMENTATION:

In the synagogue where "PSC is working the best", there is a team of professional and lay leaders who are working together, the rabbi doesn't "pull status" unless it is needed, and the PSC leadership team chose its desired area of improvement (defining the synagogue's "personality") and started "moving on it" (by creating a mission statement through "teaming" and "visioning", by "testing" out the mission statement with the board, and by "testing" it out with the congregation at large).

2) IMPACT:

Since the project just began in 1996, it is too soon to see if long-term impact objectives have been met. In terms of short-term impact objectives, one synagogue's team members feel satisfied about having had time to reflect and they are no longer resistant to text-study at their meetings.

Title of Synagogue Change Project: Partners for Synagogue Change (PSC)

Hunches Re: Factors Linked to "Success":

1) CHARACTERISTICS OF SYNAGOGUES:

- leadership is key; it is both an "end"(definition of success) and a "means to an end"(factor linked to success):

- professional side: senior rabbi who is thoughtful, reflective, not defensive, demanding involvement from others

- professional side: role of educator is critical for ECE ("We should have thought more about the changing role of the educator")

- lay commitment is critical ("I'm aware that there are people missing from the PSC Team, but maybe we'll add more as the visioning process progresses")

- leaders that are really open to change and not just giving "lip service" to it

- leadership (lay and professional) that works together (This will lead to a "healthier" organization.)

- patience and "willingness to stick with a process which is countercultural in most cases"

2) CHARACTERISTICS OF THE CHANGE PROCESS:

(Note: Some of these characteristics are part of PSC and others are characteristics that PSC is lacking):

- having synagogue professionals and lay leaders brainstorming together on projects

- having synagogue leaders work together under the supervision of facilitators

- having skilled facilitators who have expertise in various areas such as social work, business management, organizational development, etc.

- "not yet ready to say that the only model for synagogue change is to have a dedicated advisor who is at each synagogue on a regular if occasional basis (like ECE) for change to happen"... "but I sure think it helps"

- meetings for advisors/facilitators of different synagogues to share notes and learn from each other

- having a well thought-out process

- a perfect balance of a carefully crafted process and "not much mandated in terms of how that process unfolds" in individual synagogues (what it means for individual congregations varies);

some general roadmap (process) + a lot of flexibility and tailoring to the needs of individual synagogues.

- having "change resources" available to synagogues
- spending time reflecting and synthesizing information before kicking off the process
- valuing the "little changes" such as "low hanging fruit" projects which make change more manageable and realistic for synagogues

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 1

Title of Synagogue Change Project: Synagogue 2000: A Trans-Denominational Project for the Synagogue of the 21st Century

Sponsoring Agency: Synagogue 2000 is an independent organization; Principal Investigators' offices are housed at the University of Judaism (Los Angeles) and Hebrew Union College-Jewish Institute of Religion (New York).

Sources of Data (interviews & written materials):

Interviews:

- Dr. Adrienne Bank-3/19/98
- Ellen Franklin-3/11/98
- Adina Hamik-6/17/98
- Rabbi Larry Hoffman-6/11/98
- Dr. Ron Wolfson-2/24/98

Written Materials:

- Bank, Adrienne, "Synagogue 2000: A Trans-Denominational Project For the Synagogue of the 21st Century: Year One Report: A Change Theory-In-Use", October 20, 1997.
- Bank, Adrienne, "Synagogue 2000 Conference Ojai, California: Conference Report-Back Executive Summary", December 15-19, 1996.
- "Journeys: A Newsletter of Synagogue 2000"-Volume One, Number One, Fall 1997.
- "Synagogue 2000 Pilot Sites"-1998.

Address and Phone # For Learning More About This Change Project:

Dr. Ron Wolfson, Principal Investigator (310) 476-9777 x789
Ellen Franklin, Project Associate (310) 476-9777 x512
Synagogue 2000
University of Judaism, Whizin Institute
15600 Mulholland Drive
Los Angeles, CA 90077
(310) 440-1279

Rabbi Larry Hoffman, Principal Investigator (212) 674-5300
Adina Hamik, Project Associate (212) 674-5300 x223
Synagogue 2000
Hebrew Union College-Jewish Institute of Religion
1 West 4th Street
New York, NY 10012
(212) 824-2250

Sponsoring Agency Type:

- ☒ national organization
☐ central education agency

- federation or continuity commission
- foundation
- movement, movement-affiliated college or other organization
- individual synagogue

Type of Synagogue Change Project:

- ☒ planned total synagogue change
- planned total synagogue school change
- planned change targeted to one aspect of synagogues at a time
- 'organic' unplanned change

- ☒ national
- regional
- one synagogue

Movement affiliation of synagogues involved in this change project:

- ☒ Trans-denominational
- Orthodox
- ☒ Conservative
- ☒ Reform
- Reconstructionist

of Participating Synagogues:

Year 1 & 2 (and continuing in Year 3):

16 pilot congregations: 8 Conservative & 8 Reform; 9 on the East Coast; 5 on the West Coast; 2 in the Mid-West; sizes varying from 500-1500 membership units.

Year 3:

6 new congregations in the Washington, DC area

Names & Characteristics of Participating Synagogues (16 pilot congregations):

| <u>Name</u> | <u>Location</u> | <u>Size</u> | <u>Movement</u> |
|----------------------------|-------------------------|-------------|-----------------|
| Agudas Achim | Alexandria, VA | | Conservative |
| Agudath Israel | Caldwell, NJ | | Conservative |
| Beth Jacob Congregation | Mendota Heights, MN | | Conservative |
| -Congregation B'nai Shalom | Walnut Creek, CA | | Conservative |
| -Congregation B'nai Shalom | Westborough, MA | | Reform |
| -Congregation Beth David | Saratoga, CA | | Conservative |
| -Congregation Ner Tamid | Rancho Palos Verdes, CA | | Conservative |
| -Huntington Jewish Center | Huntington, NY | | Conservative |
| -Mount Zion Temple | St. Paul, MN | | Reform |
| -Temple Beth El | Providence, RI | | Reform |
| -Temple Beth Zion | Buffalo, NY | | Reform |
| -Temple Isaiah | Los Angeles, CA | | Reform |
| -Temple Israel | Omaha, NE | | Reform |
| -Temple Micah | Washington, DC | | Reform |
| -Temple Shalom | Succasunna, NJ | | Reform |
| -Town & Village Synagogue | New York, NY | | Conservative |

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 2

Title of Synagogue Change Project: Synagogue 2000: A Trans-Denominational Project for the Synagogue of the 21st Century

Objectives of Project:

- to re-energize and "respiritualize" the American synagogue
- to transform the synagogue from a place that caters primarily to children to a place of Jewish spiritual growth for adults of all ages (with the assumption being that if adults' spiritual needs are met by the synagogue, the adults will bring a respiritualized sense of self back into their homes, and that will ultimately affect their children as well)
- to change the synagogue from a place of "old-world ethnic appeal" to a place that has a "spiritual message" for all who seek meaning (in an age where the search for life's meaning has becoming a key concern)
- to make synagogues into "spiritual centers" where people can pursue their Jewish journeys and find God's presence
- to make synagogues more religious and less institutional
- to make synagogue life more meaningful and relevant to American Jews

Description of Change Project (the project's vision of synagogue life & the project's change process/"how it works"):

Synagogue 2000 envisions the synagogue of the 21st century to be the spiritual center of members' lives, where an impersonal synagogue is changed into a place of warmth and welcome, where the way in which synagogues "do their business" is changed from hierarchical and bureaucratic to personally enriching, and where there is a renewed sense of healing and social justice, Jewish learning for people of all ages, and prayer services that are "compelling and compassionate". In its attempt to "re-spiritualize" all aspects of synagogue life, Synagogue 2000 targets 4 "product areas" and 2 "process areas":

"Product Areas":

- 1) Prayer
- 2) Healing
- 3) Good Deeds/Social Justice
- 4) Study/Learning

"Process Areas":

- 1) Institutional Change
- 2) Ambiance/ Synagogue Design/ Sanctuary Space

These 6 key themes form the acronym PISGAH: Prayer, Institutional Change, Study, Good deeds, Ambiance, and Healing. While the overall objective of Synagogue 2000 is to "respiritualize" synagogues, the specific definition of what it means to "respiritualize" and the strategies of how to "respiritualize" are determined by each

individual synagogue within the broad context of the definition of "Jewish spirituality" provided by Synagogue 2000. Ultimately, each synagogue should work on all 6 points of the PISGAH, but each participating synagogue started out its change process in year 1 by focusing on either "prayer" or "healing"; all synagogues are also working on "ambiance".

According to Year 1 documentation of the Synagogue 2000 change process, the "theory-in-use" for making synagogues into spiritual centers is that within each synagogue, a "core group" of 5-7 people will radiate its enthusiasm, energy, and knowledge to a larger "change team" of 20-30 people (consisting of clergy, lay leaders, 'movers and shakers' and 'peripheral' congregants) who will, in turn, inspire the same enthusiasm throughout the synagogue infrastructure and to members and potential members of the synagogue. Then, it is hoped that the process will be reproduced at the city, regional, and national level. The 16 pilot congregations are supposed to serve as "hothouses" or "research centers" from which learning will be gained and will then spread to an ever-widening set of synagogues through modeling, demonstration, leadership, and informal networking. From the "small ripples" created by the 16 pilot congregations, Synagogue 2000 is intended to generate a "larger wave" which may come to include many, if not all, of the synagogues in the country.

Synagogue 2000's "theory-in-use" is based on the assumption that institutional change cannot happen without personal change in individuals (either preceding or occurring concurrently with the changes in the institution). The underlying premise is: "If you turn on some individuals, they will turn on others, and the institution will ultimately be changed because the people in it have changed". Synagogue 2000's "theory-in-use" is also based on the premise that synagogues are not comprised solely of inner-circle "top people" who are already leaders (though it takes seriously the lessons of institutional change that emphasize the ideas of people in powerful leadership positions); Synagogue 2000 seeks to expand the inner-circle to include other congregants as leaders. It is, therefore, a relatively "flat" notion of change as opposed to a "top-down" hierarchical notion of change. It stresses democracy and teamwork between clergy, other professionals, and lay leaders.

Each participating synagogue's "core group" of 5-7 people attends an annual retreat in Ojai, CA. Retreats incorporate a team approach and "experiential learning characterized by intellectual seriousness and emotional intensity". At the first retreat for the 16 pilot synagogues (December, 1996), the core groups were given a set of curriculum materials ("itinerary") on one area of emphasis ("track") -either "Prayer" or "Healing". Each "itinerary" or curriculum binder included instructional materials with agendas, process techniques, text-based study materials, resources, and suggested ways of conducting meetings throughout the year. After the 1996 retreat, each synagogue's "core group" met approximately once per month with the rest of its synagogue "change team" using the "Prayer" or "Healing" curriculum itinerary as a guideline for each meeting. In addition, each synagogue's "change team" had to implement "low-hanging fruit" projects- concrete and manageable

projects that contributed towards the synagogue's ultimate goal of respiritualizing the synagogue through the route of prayer or healing.

The theme of the second retreat for the 16 pilot synagogues (December, 1997) was "Respiritualizing the Infrastructure of the Synagogue". At the retreat, each synagogue's "core group" was given a new set of curriculum materials ("itinerary") for the following year's "change team" meetings. The "itinerary" for 1998 included a choice of four possible routes for respiritualizing the synagogue:

- 1) Marketing: focusing on the synagogue's "frontline image", the face it projects to the community, and its public persona as a welcoming and spiritual place for Jews of all ages, family constellations, and approaches to seeking Jewish meaning.
- 2) Membership Process: focusing on the membership intake process including how people are greeted when they call the synagogue office or walk into the building and how new members are welcomed into the congregation after they join the synagogue.
- 3) Jewish Journey Groups: dividing congregants into smaller and more intimate affinity groups of individuals who are on either on similar spiritual paths, going through similar lifecycle events (such as divorce or early parenthood), or committed to similar expressions of Jewish meaning or identity (such as specific social justice or learning projects).
- 4) Track-Deepening: continuing to focus on one of Synagogue 2000's "product-area" tracks from the previous year, "prayer" or "healing".

During Year 1, each synagogue team was assigned a liaison from Synagogue 2000's liaison team; most of these liaisons had other full-time jobs and just provided advice to congregations on an as-needed basis. In Year 2, Adina Hamik and Ellen Franklin were hired as full-time project associates; they each have ongoing, regular contact with the 16 pilot synagogue teams. In Year 3, Synagogue 2000 will be rolling out in Washington, DC. This community model of Synagogue 2000 will feature the addition of a staff person who is affiliated with the local Federation; she will be the primary contact person with each of the participating congregations in the area.

History of Change Project (when it started, who started it, etc.):

In 1994, Ron Wolfson (of University of Judaism's Whizin Institute for Jewish Family Life) and Larry Hoffman (of Hebrew Union College-Jewish Institute of Religion) were brought together by Rabbi Rachel Cowan of the Cummings Foundation. After receiving a planning grant from the Cummings Foundation in 1994/1995, Ron and Larry convened a series of focus groups with rabbis, cantors, lay leaders, educators, and researchers around the country to brainstorm ideas about the "synagogue of the future". During that year, Ron and Larry also visited some of the "mega-churches" and the Alban Institute, and met with representatives from HUC's Experiment in Congregational Education (ECE). After a year of information-gathering and planning, they assembled a group of approximately twenty advisors, consisting of people who were on the cutting-edge of synagogue life, artists, and experts in change management. In 1995/1996, 60 synagogues (representing a balance of Conservative, Reform, and Reconstructionist synagogues from around the

country) were invited to apply to become pilot congregations for Synagogue 2000. In consultation with subject-area experts from the advisory group, Ron and Larry compiled the "Prayer" and "Healing" curriculum "itineraries". In December of 1996, the first Ojai retreat was convened for the 16 synagogues that were selected as Synagogue 2000 pilot congregations. The first year of the implementation of Synagogue 2000 in synagogues was 1996/1997. The second Ojai retreat for the 16 pilot synagogues took place in December of 1997. Synagogue 2000 is scheduled to roll out in Washington, DC with 6 new synagogues in the fall of 1998.

Synagogue Selection Process (how pilot synagogues were selected to participate):

In 1995/1996, 60 Reform, Conservative, and Reconstructionist synagogues were invited to apply to become Synagogue 2000 pilot congregations. These 60 synagogues were ones which were already aware of Synagogue 2000 and which requested to be considered as charter congregations. To be selected, congregations had to be evaluated and considered to be "change ready". Criteria for "change readiness" included: positive lay/professional relations, positive relations between the rabbi and the cantor, and a demonstrated track record of innovativeness and willingness to change. Out of the 28 Reform and Conservative synagogues that completed the complex application process, 16 were selected to be Synagogue 2000 pilot sites. The selection criteria included "change readiness", the willingness to commit time and money (up to \$20,000 over a two year period), and 6-8 personal statements of support for Synagogue 2000 from clergy, board members, and other lay leaders. In addition, Ron and Larry aimed to select an equal balance of Reform and Conservative synagogues. They also aimed for geographical diversity. Synagogues with innovative structures were given special consideration.

Role of outside consultants: In addition to the annual retreats for all of the participating synagogues' "core groups" in Ojai and the monthly meetings of each synagogue's "change team", an additional component of Synagogue 2000 is ongoing consulting to each synagogue. After the first retreat, during the first year of Synagogue 2000's implementation in synagogues (1997), some of the members of Synagogue 2000's advisory group (now called the "liaison team") were assigned to individual congregations to advise synagogues' "core groups" and "change teams" on an as-needed basis throughout the year. In addition, some members of Synagogue 2000's "liaison team" functioned as consultants who had expertise in one particular area such as change management, dance and movement, or meditation. The following individuals were each assigned to one or more of the 16 pilot congregations as liaisons: Sami Barth, Elliot Dorff, Moshe Edelman, Amy Eilberg, Ed Feinstein, Nancy Flam, Dan Freeland, Elyse Frishman, Rick Jacobs, Alan Lew, Rikki Lippitz, Roly Matalon, Kerry Olitsky, Benjie Ellen Schiller, and Elaine Zecher. Some other "liaisons" were not assigned to specific congregations but did make presentations at the Ojai retreats and are available to advise congregations (or other liaisons) in their areas of expertise. For example, Karen Barth and Adrienne Bank consult on change management and Liz Lerman consults on dance and movement. Adrienne Bank also consults to Synagogue 2000's staff as an evaluator and a strategic planner.

Since the second retreat, troubleshooting and consulting ("phone coaching") has been provided by two full-time staff members of Synagogue 2000: Ellen Franklin, who is based at the University of Judaism in Los Angeles and Adina Hamik, who is based at HUC-JIR in New York. Ellen and Adina are in weekly contact with all 16 pilot synagogues. They generally keep in touch with 2-3 people at each synagogue on a regular basis. Ellen and Adina assist the synagogues in transitioning from study to action; they constantly remind synagogue teams of the Synagogue 2000 vision so that each congregation's actions are kept in line with this vision. Ellen and Adina assign others at Synagogue 2000 to make site visits or phone contacts with synagogues regarding specific areas of concern that demand specialized expertise (in areas such as change management, music, and sacred space). Adrienne Bank consults to Synagogue 2000's staff as an outside evaluator and strategic planner. In addition, all Synagogue 2000 team members provide informal 'consulting' to each other through an e-mail list server.

Based on learning from the first two years of Synagogue 2000, it was determined that "the liaison model didn't work" for some synagogues since many liaisons did not have regular, ongoing contact with their assigned synagogues. While the members of the liaison team will continue to function as a "think tank", they will not consult to individual congregations. For the 16 pilot synagogues, Ellen and Adina will be the primary contacts who provide guidance and advice to each synagogue team. For the 6 synagogues in Washington, DC, consulting and troubleshooting will be provided by a change manager who is affiliated with the local Federation.

Synagogue 2000's staff have been continually examining the synagogues' needs for ongoing support and experimenting with different consulting approaches to meeting these needs. In its first year, Synagogue 2000 utilized a "dedicated consultant" model, in which one liaison was assigned to each synagogue. However, this model did not work well for all of the pilot synagogues. Roles, relationships, time commitments, and the nature of the liaison contacts were not clearly defined in advance because it was unclear what kind and how much assistance would be needed by each congregation at the inception of Synagogue 2000. After discussing the congregations' needs with all of the Synagogue 2000 liaisons, Synagogue 2000's staff identified several types of congregational needs that related to the project and then adapted Synagogue's 2000 consulting model to meet these needs. Congregations' needs included the need for reassurance, psychological support, and troubleshooting; the need for "core" advice and guidance regarding the Synagogue 2000 'product' and 'process'; and the need for guidance in group process and change management skills. Pilot synagogues also expressed the need to be in ongoing communication with each other. Based on these congregational needs, Synagogue 2000 instituted the following changes: a prototype newsletter was developed, e-mail was used for inter-synagogue communications, more written and video materials were developed, and Larry and Ron acted as 'cheer-leaders', trouble-shooters and advisors to all of the pilot synagogues. During the second year of the project, Synagogue 2000 moved to a "phone consultation" model in which Adina and Ellen

kept in close phone contact with the synagogues; they initiated as well as responded to calls and they kept running records of issues that arose at each pilot synagogue. Some of the issues which related to the change process were discussed at phone conference staff meetings and acted upon accordingly; site visits, phone consultations, and the dissemination of written materials were initiated by Synagogue 2000's four staff members to meet the congregations' needs. Beginning in the second year of the project and continuing in the third year, Synagogue 2000's consulting model was further adapted to include both on-site and outside "change-agent advisors".

Role of outside organizations: Synagogue 2000's staff in Los Angeles and New York consult to each of the pilot congregations on an as-needed basis. Synagogue 2000's staff also coordinated the retreats and compiled the curriculum "itineraries" in consultation with subject-area experts. HUC-JIR and the University of Judaism support Synagogue 2000 financially by lending two faculty members to the project as "principal investigators" (Ron Wolfson at the University of Judaism and Larry Hoffman at HUC-JIR) and by providing administrative support.

How it is funded: Synagogue 2000 is supported by grants from the Nathan Cummings Foundation, Steven Spielberg's Righteous Persons Foundation, and the Shirley and Arthur Whizin Trust. Costs of Synagogue 2000 include the consulting fees for each liaison, curriculum development fees for liaisons and staff who wrote sections of Synagogue 2000's curriculum itineraries, the costs of the Ojai retreats, administrative support for Synagogue 2000 in New York and Los Angeles, computer consulting and web-site maintenance, evaluation, and internal strategic planning. The synagogues all pay fees for their liaisons. The synagogue costs include sending each member of the "core group" to an annual retreat and subventing part of the conference costs (including registration, room and board, and ground transportation). The retreats are partially subsidized by Synagogue 2000's budget.

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 3

Title of Synagogue Change Project: Synagogue 2000: A Trans-Denominational Project for the Synagogue of the 21st Century

Definitions of "Success":

GENERAL COMMENTS:

- Definitions of success will be different for each synagogue since "Synagogue 2000 is like velcro; there are lots of places to attach oneself to it". While some pilot congregations strive to incorporate all or most of Synagogue 2000's ideas, others only have a peripheral attachment to the "Synagogue 2000 ethos" and are just interested in connecting with other synagogues who want synagogue life to be better and/or the terrific liaisons and resource people that are part of Synagogue 2000.
- "Success is not a final destination"; "It's not so much whether they have reached an end point, but whether they are on their way"; "Success is just moving in the right direction".
- "Synagogues, like individuals, are to see themselves as being on a progressive Jewish journey".

1) IMPLEMENTATION

- synagogues returning to annual retreats, with messages of excitement and success, as well as stories of failure from which other synagogues can learn
- more people from each synagogue attending the retreats from year to year
- synagogue participants in Ojai (in the "core group") understanding the Synagogue 2000 vision, following the curriculum itinerary process with their "change team", and implementing a low-hanging fruit project
- synagogue "core groups" successfully motivating 20-30 congregants and professional staff to participate in the Synagogue 2000 process as part of the "change team"
- congregants in participating synagogue being aware of Synagogue 2000
- participating synagogues "getting it" (the Synagogue 2000 vision)
- participating synagogues demonstrating that they "get it" (the Synagogue 2000 vision), with each synagogue "getting it" in a somewhat different way (e.g. through the vehicle of prayer or healing)
- congregants and professional staff in participating synagogues being "on board" with Synagogue 2000 and taking action to express their support (not just the "core group" and the "change team", but also many others from the congregation at large and members of the synagogue's infrastructure)
- elements of Synagogue 2000 filtering into the synagogue at large; "branching out beyond the change team": (e.g. , with congregants beyond the "core group" and the "change team" participating in "track-deepening" study sessions related to prayer or healing)
- improvements in synagogues' "front-line training"

2) IMPACT

- participating synagogues becoming "purpose-driven" instead of "program-driven" (e.g. people asking themselves questions such as "To what extent is this program or meeting moving us forward towards achieving our vision of becoming a spiritual place?")

- implementing programs and meetings that reflect a sense of spiritual purpose, rather than just a manifestation of "keeping busy" or focused on bringing people into the door

(e.g. having board meetings start with prayer, spending more time at ritual committee meetings discussing what is wrong with the prayer service rather than discussing bimah logistics).

- synagogues changing the way they conduct prayer services in ways that best suit their context (e.g. incorporating more experimentation and more lay participation, utilizing a more creative use of space, incorporating congregational singing and movement, incorporating some meditative time into the service such as by the use of "majestic music", conducting a healing service for those who are physically ill or in psychological pain, reaching out to people during services, having "entry points to prayer" such as handing out siddurim and transliterations to people as they walk in and showing them the page number, facilitating more of a sense of community during services, conducting an educational session during the post-service Kiddush to teach congregants melodies and the history of some prayers)

- synagogues being more "welcoming"

- vibrant, active, populated synagogues with people engaged in all sorts of activities and dialogues with each other

- synagogues being central in people's lives

- synagogues being "more in synch with" some aspect of "the Synagogue 2000 ethos" (e.g. being less hierarchical, being more spiritual, being more welcoming)

- a more "respiritualized" synagogue, according to each synagogue's own definition of "respiritualization" (e.g. being more welcoming, feeling like more of a community, having services that are more engaging for more people, having alternative services for "seekers" and "founders", being more religious and serious, etc.)

- an improved synagogue culture embodying some of the values of Synagogue 2000

- evidence that Synagogue 2000 has made a difference in congregants' lives in various ways:

- increased synagogue attendance and involvement

- changed attitudes towards the synagogue

- a sense of connection with the synagogue

- having more friends at the synagogue

- feeling that they are on some sort of Jewish spiritual journey

- synagogues populated by individuals who embrace Judaism in every aspect of their lives, rather than just viewing Judaism as an addendum to their lives or as a 'tit-for-tat' institution (i.e. services in exchange for membership dues)

Title of Synagogue Change Project: Synagogue 2000: A Trans-Denominational Project for the Synagogue of the 21st Century

Perceived Outcomes to Date ("What's Happening?"):

GENERAL COMMENTS:

- "It takes a long time to change synagogue culture. The low-hanging fruit is just a way into the bigger issue of synagogue transformation. We're not just talking about programming here".
- "It will take 20 years before we see real deep and lasting change of the sort we're envisioning".
- Synagogue 2000's evaluators have collected some information (anecdotes, interviews, and surveys) that still needs to be analyzed and synthesized. Based on this data, Synagogue 2000's staff will garner several "lessons learned" and will develop specific "indicators of success" which will contribute to the growing knowledge base about synagogue change.

EXAMPLES OF SUCCESS IN YEAR 1:

1) IMPLEMENTATION

- All 16 synagogues returned to the second retreat.
- Many of the synagogues that returned to the second retreat came with more people (a larger "core group").
- The members of the "core group" felt inspired by the retreats at Ojai.
- All 16 pilot synagogues put together a "change team" of 20-30 people and followed the Synagogue 2000 curriculum itinerary during the first year.
- All 16 synagogues implemented "low hanging fruit" projects. For example, one synagogue put together a "Shalom Squad" greeting system to make the synagogue feel more welcoming. Another synagogue completely changed its physical environment. A third synagogue instituted "Zip Code Havdalah" celebrations for members and their families across the city.
- The rabbi in one congregation stated, "I can't quantify it, but I have a feeling that the values of Synagogue 2000 are starting to spread throughout the synagogue".

2) IMPACT

- The individuals who are involved in the "core group" and the "change team" are deepening their own commitment to Judaism.

AREAS FOR IMPROVEMENT AND LESSONS LEARNED

(AT THE END OF YEAR 1):

- Synagogue 2000 is primarily just an addendum in most synagogues.
- Many synagogues get caught up in specific programs such as the "low-hanging fruit" project and forget the "big picture" of Synagogue 2000.
- There has been limited impact on congregants outside of the "core group" and the "change team".
- Synagogue 2000 has been successful in "turning on" the "core group" of people who attend the Ojai retreats, but the "core group" has not been as successful at

"turning on" others in the congregation. Perhaps there is not enough capacity in synagogues (in terms of skills and personality) for the "core group" to be able to inspire others. Perhaps this "skill gap" can be addressed by training.

- The liaison model did not work in some pilot synagogues.
- More systematic leadership training for rabbis and other leaders is essential.
- Staffing has been woefully inadequate. Synagogue 2000 is expanding its infrastructure and creating more written materials to better meet congregations' needs and to better enable congregations to do their work.

FINDINGS LISTED IN ADRIANNE BANK'S

YEAR ONE REPORT: A CHANGE THEORY-IN-USE- OCTOBER 20, 1997:

- 1) Ojai '96 was successful
- 2) Core group became committed to Synagogue 2000.
- 3) Core group needed additional skills.
- 4) Teams sustained their enthusiasm.
- 5) Teams bonded with each other.
- 6) Heterogeneous teams worked.
- 7) Teams experienced stresses.
- 8) Core group from Ojai '96 was central to team functioning.
- 9) The clergy's role was key.
- 10) Group processes were very important.
- 11) Itineraries performed their function, structuring the year's work.
- 12) Itineraries needed revision.
- 13) Visioning was difficult for teams.
- 14) "Low-hanging fruit" consisted of changes in services (aliyot, Mi Sheberach), music (Halleluyah, nigguniin), explanations, greeters.
- 15) E-mail and technology were major contributions.
- 16) Formal outside supports were strengthened as the project progressed.
- 17) Insufficient intra-team updating about project.

Title of Synagogue Change Project: Synagogue 2000: A Trans-Denominational Project for the Synagogue of the 21st Century

Hunches Re: Factors Linked to "Success":

1) CHARACTERISTICS OF SYNAGOGUES:

- buy-in by the whole synagogue community to participate in the Synagogue 2000 change process (not just the rabbi, at least the rabbi and the board, ideally the cantor and other professional staff as well)

(Note: Buy-in to the Synagogue 2000 vision is not a pre-requisite factor that is necessary for successful synagogue change; it is also a definition of success since many synagogues do not understand the Synagogue 2000 vision a priori but they do "get it" later on.)

- not having a congregation that is "split" re: supporting Synagogue 2000 and the change process

• "The role of the clergy proved critical to the process": extent of clergy members' participation and their actions strongly influenced the team.

- buy-in by the rabbi: difficult for lay people to make changes without rabbi supporting them; rabbi needs to at least be on board & not obstructionist

- "strong rabbi": having a vision of his/her own (that is consistent with Synagogue 2000's vision) or at least open to having a vision

- critical requirement: a rabbi who is willing to take risks, is not timid, and is willing to be bold in the face of congregants who do not want change in the synagogue. ("As Chief Executive Officer of the synagogue, the rabbi can make it or break it.")

- rabbi who is 'young' in his/her outlook, is open to change, and is willing to put the time into the change process.

- role of cantor in an unspoken but important role; needs an enormous amount of study; cantor has to understand the role of music for individual congregants & how they respond to music (i.e. music is not just for performance & self-aggrandizement) (e.g. ideal cantor/rabbi team at BJ: cantor choreographs the music)

- professionals involved being open to change

- not having board members who are "fine where things are" and who are opposed to change and to moving in new directions

- partnerships between clergy & laity
 - teamwork so that people see it as "our problem" instead of "my problem"
 - time: rabbi freed up to do the work of Synagogue 2000 and various people on the change management team willing to give time to Synagogue 2000 meetings.
 - not in the process of implementing another new project (e.g. new building construction) because the synagogue needs to focus its energy on the change process
 - need both exogenous (pushes) & endogenous (pulls) factors:
 - Pushes:
 - dissatisfaction with the status quo
 - loss of \$ or something else
 - positive impetus for change:
e.g.) overwhelming growth in one area of membership
 - Pulls:
 - leadership capacity
 - motivation
-

2) CHARACTERISTICS OF THE CHANGE PROCESS:

- having a good product & a good vision
- synagogues themselves need to be validated; outside change agent can't come in & say "We're the experts"
- a change process that provides some suggested guidelines and steps (e.g. visioning, planning, and "low hanging fruit" projects, evaluation), but that enables the individual synagogues to determine the exact nature & sequence of the process
- regular ongoing contact with the synagogues
(They "want to hear from us" because they want support & materials; they also need to be reminded of the vision of Synagogue 2000.)
- 'consultants'/advisors who work with each synagogue: people who work with synagogues on an ongoing basis and are in regular contact with the synagogue teams
- Itineraries provided the appropriate content, process suggestions, and resources to structure the team's study activities
- high quality curriculum materials and/or 'templates'
(to make the abstract concrete)

(e.g. can't just say "Do an Omer study group"; need to send an Omer calendar and study materials).

(e.g. can't just say "The front line is your bottom line. If your front line thinks it's doing spiritual work, then you will be a spiritual place."; need to give synagogues a template to show them how to train front office staff and guards to convey that the synagogue is a welcoming place.)

- Synagogue 2000 staff members modeling what they say synagogues should do ("We are authentic.... The medium is the message.")

(e.g. If we say, "Be a team", then we act as a team.)

(e.g. If we tell synagogue team members to ask each other, "How are you?", we do the same thing at Synagogue 2000 staff meetings & conference calls, etc.)

- retreats with emotional, experiential, and intellectual components

- core groups (retreat participants) infusing larger teams, providing them with leadership, guidance, and staying power

- team approach: having teams attending retreats and being involved in the change process

- support and communication devices (e.g. e-mail list serve, inter-synagogue retreats and meetings, etc.)

- skill gap needs to be addressed: need leadership training (primarily for rabbis, but also for lay leaders and for cantors) to enable synagogue professional and lay leaders to inspire others and "turn them on" to the Synagogue 2000 vision

CHARACTERISTICS OF THE CHANGE PROCESS

based on Adrienne Bank's October, 1997 write-up
Year One Report: A Change Theory-In-Use-October, 1997:

Five Components Of Syn. 2000's Change Process That Were Intended To Create The Conditions For Synagogue Transformation:

- 1) large gathering at Ojai for experiential learning, intellectual seriousness, and emotional intensity
- 2) team approach where a core group of 3-5 individuals per synagogue experiences something personally meaningful and then returns home to organize similar experiences for 20-30 others
- 3) written Itineraries (Prayer and Healing)-instructional materials with agendas, process techniques, study materials, and resources
- 4) suggested change process-inc. visioning, planning, taking small actions ("low hanging fruit"), and evaluation: nature & sequence of the mix is left to each synagogue
- 5) variety of supports and communication devices (e.g. liaisons for each synagogue, administrative back-up on West Coast and East Coast; between-Conference get-togethers for clergy and liaisons)

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 1

Title of Synagogue Change Project: Synagogue Initiative Program (S.I.P.)

Sponsoring Agency: Commission on Jewish Education (CJE) of the Jewish Federation of Greater Hartford

Sources of data (interviews & written materials):

Interviews:

Sandy Dashefsky-4/16/98

Written Materials:

- Jewish Federation of Greater Hartford's Strategic Plan-October 30, 1996
- "Readiness-What Institutions Need for Systems Change and Levers to Help Create Change"-Handout for Hebrew College Class on Institutional Change, Winter 1996, Instructor: Sandy Dashefsky-adapted from session with Dr. Susan Shevitz, Brandeis University.
- RFP (Request for Proposals) for Designated School Program (DSP): letters from Bruce Stanger and Rabbi Jeremiah Unterman of the Commission on Jewish Education-1/30/96 and 2/9/96
- Synagogue Initiative Program (SIP): Commission on Jewish Education of the Jewish Federation of Greater Hartford (Revised version, February, 1996)
- Synagogue Initiative Program (SIP) Grant Evaluation-The Endowment Foundation of the Jewish Federation of Greater Hartford-January, 1998

Address and Phone # For Learning More About This Change Project:

Sandy Dashefsky, (860) 646-1842
Educational Director of Synagogue Change Projects
145 Kent Drive
Manchester, CT 06040

Sponsoring Agency Type:

- national organization
- ☒ central education agency
- federation or continuity commission
- foundation
- movement, movement-affiliated college or organization
- individual synagogue

Type of Synagogue Change Project:

- ☒ planned total synagogue change
- ☒ planned total synagogue school change
- planned change targeted to one aspect of synagogues at a time
- 'organic' unplanned change

- ☐ national
- ☒ regional
- ☐ one synagogue

Movement affiliation of synagogues involved in this change project:

- ☒ Trans-denominational
- ☐ Orthodox
- ☒ Conservative
- ☒ Reform
- ☐ Reconstructionist

of Participating Synagogues: 2

Names & Characteristics of Participating Synagogues:

| <u>Name</u> | <u>Location</u> | <u>Size</u> | <u>Movement</u> |
|--------------------|-------------------|----------------|-----------------|
| •Emanuel Synagogue | West Hartford, CT | 695 households | Conservative |
| •Kol Chaverim | Glastonbury, CT | 215 households | Reform |

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 2

Title of Synagogue Change Project: Synagogue Initiative Program (S.I.P.)

Objectives of Project:

- to "re-engineer" synagogues and supplementary schools by facilitating synagogue leaders' radically rethinking the synagogue and supplementary school's vision, mission, and methods
- to create an inclusive congregational community in which all constituents are engaged in the planning and implementation of the synagogue and supplementary school's mission and program by creating partnerships among a broad base of professionals and lay leaders
- to build cooperation among the many arms of the synagogue and school community (e.g. membership, ritual, early childhood education, elementary education, adult education)
- to nurture "a strong sense of Jewish identity, knowledge, and living" in synagogue members of all ages
- to make Judaism a compelling choice for people of all ages through "formal and informal structures"
- to implement "unique and experimental plans for action" in synagogues
- to develop the skills of synagogue professionals and lay leaders
- to "advance" the synagogue supplementary school and to make the supplementary school a "pivotal core" of the congregation
- to create a synagogue atmosphere that is conducive to Jewish educational pursuits at all levels
- to train leadership to be able to continue the process of change

Description of Change Project (the project's vision of synagogue life & the project's change process/"how it works"):

Vision of synagogue life: an inclusive community in which all constituents are engaged in the planning and implementation of the synagogue and supplementary school's vision, mission, and programs.

Underlying assumptions: The most successful synagogue schools are those that are viewed as central to the concerns and mission of their host synagogues. The first step that is necessary to advance the synagogue supplementary school is to "trigger total engagement of an institution in rethinking or re-engineering its synagogue and supplemental school". Consistent with the theory of "systems change", the school and synagogue must each regard themselves as integrated parts of a greater whole.

Process:

1) Initiating the Systems Change Process:

- formation of a SIP committee in each synagogue (comprised of 15-25 people), consisting of the rabbi, cantor, principal, teachers, and lay leaders representing various committees (e.g. membership, ritual, youth education, and adult education)

- consultant-facilitated workshops, exercises, study sessions, and conferences related to synagogue/school systems change
- survey of the synagogue's structure and needs
- consultant-facilitated workshops and exercises aimed at developing the synagogue's vision, mission statement, and action plans which reflect the synagogue and school's role in promoting and sustaining Jewish identity and education (formal and informal) for people of all ages
- ongoing collaboration, planning, and team-building among a broad base of the synagogue's principle constituents including the rabbi, principal, cantor, teachers, parents, and lay leaders from various committees
- SIP committee meetings with CJE consultants approximately once every other month
- SIP sub-committee meetings with CJE consultants approximately once per month (sub-committee meetings include consultant, coordinator, and a few key synagogue leaders)
- retreats for 10-15 people from each synagogue approximately twice per year: for pilot synagogues to come together with each other, with the CJE consultants, and with Jewish education scholars such as Joseph Reimer and Susan Shevitz

2) Implementation and Experimentation:

implementation of the synagogue and school's action plan which incorporate new experimental approaches and which reflects the vision and goals of the synagogue and school

3) Professional and Lay Leadership Development:

ongoing training and modeling for synagogue lay leaders and professionals to enable them to facilitate all aspects of SIP, including visioning, analyzing community needs, and creating and coordinating programming

4) Evaluation:

ongoing formative evaluation process and summative evaluation coordinated by CJE in collaboration with the SIP institutions

History of Change Project (when it started, who started it, etc.):

When Sandy Dashefsky was the Assistant Executive Director of the Commission on Jewish Education (CJE) in 1995, she became interested in Jewish institutional change as a means of making the Greater Hartford synagogues and schools the best that they could be. This interest in institutional change was based on "research indicating the importance of creating community commitment that resulted from a broad engagement of lay and professional constituents rethinking the synagogue and school's mission and methods". Sandy explored various models of institutional change that were emerging at the time in Jewish settings, including the Experiment in Congregational Education (ECE), Philadelphia's Designated School Project (DSP), and the initiatives of the Boston Continuity Commission; she spoke with various experts in the field, including Isa Aron, Leora Isaacs, Joe Reimer, Susan Shevitz, and Helene Tigay. In particular, Sandy and others at the CJE became interested in

holistic synagogue change that went beyond the implementation of isolated programs. In the fall of 1995, Sandy Dashefsky and Jerry Unterman, the Executive Director of the CJE, submitted a grant proposal to the Endowment Foundation of the Jewish Federation of Greater Hartford. Initially, the name of the project was the Designated School Program (DSP), which was similar to the name used by Philadelphia's Central Agency of Jewish Education. However, the synagogue leadership requested a name change and the project title was changed to the Synagogue Initiative Program (SIP) in February, 1996. In the winter of 1996, the CJE formed a sub-committee to oversee the SIP project. In the summer of 1996, the two pilot synagogues began implementing the SIP process. As the CJE began its implementation of SIP, the Jewish Federation of Greater Hartford was developing a strategic plan which also targeted the transformation of the synagogue supplemental school as one of its primary areas of focus. As a result, the SIP pilot is now being followed up by a new (and larger) Federation synagogue change project, La'atid: Synagogues for the Future, which is receiving funding from a Covenant Grant.

Synagogue Selection Process (how synagogues were selected to participate):

In January of 1996, the CJE sent a letter out to all Hartford-area synagogues, inviting them to apply to participate in what was then known as the Designated School Program (DSP). Of the 9 synagogues that were interested, 6 applied, and 2 were selected by a lay committee to begin participating in what became known as the Synagogue Initiative Program (SIP) in 1996/1997. The 2 synagogues were selected using criteria of readiness that Sandy compiled based on her doctoral work in education and sessions with Dr. Susan Shevitz of Brandeis University. Each member of the SIP lay committee rated each of the synagogues that applied. Readiness criteria included:

- stability and charisma of lay leaders
- stability of professional staff
- history of professionals and lay leaders working together
- internal champions of the change project
- professional and lay leaders with vision
- absence of side-agendas (so that synagogue leaders can focus on SIP)
- basic administrative competence
- resources: time and \$
- a "can-do" culture
- institutional pride

Role of outside consultants: Initially (beginning in the summer of 1996), the two consultants to the SIP pilot congregations were Sandy Dashefsky of Hartford's CJE (Commission on Jewish Education) and Marion Gribetz of Boston's BJE (Bureau of Jewish Education). In the first two years of SIP, Sandy and Marion met with each synagogue's SIP Committee approximately once every other month. In addition, Sandy met with each synagogue's sub-committee coordinator and executive leadership once or twice per month. Sandy also facilitated biannual retreats and ongoing classes at Hebrew College's Hartford branch for a sub-group of each of the synagogue's SIP Committees. Brandeis faculty members Joseph Reimer and Susan

Shevitz functioned as outside experts/consultants to the synagogues during these retreats and classes. Other outside consultants who have facilitated SIP workshops at retreats and classes include Leora Isaacs (JESNA) and Carolyn Keller (Boston's Continuity Commission).

Role of outside organization: The Commission on Jewish Education of Greater Hartford coordinates SIP, with Sandy Dashefsky as the part-time staff person managing the project.

How it is funded: SIP is funded by the Commission on Jewish Education of Greater Hartford, with grant support by the Endowment Foundation of the Jewish Foundation of Greater Hartford. La'atid: Synagogues for the Future, Federation's expansion of SIP, is receiving grant support from the Covenant Foundation.

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 3

Title of Synagogue Change Project: Synagogue Initiative Program (S.I.P.)

Definitions of "Success":

- synagogues and supplemental schools showing evidence of "a new way of doing business"
- new institutional structures in place that reflect a more broader-based decision-making process (e.g. making educational or ritual decisions by incorporating input from many constituents throughout the synagogue and school)
- increased excitement and engagement in Jewish learning and living by people of all ages
- integration between the school and synagogue communities
- synagogue professional and lay leaders thinking "out of the box" (i.e. in more open-minded, non-judgmental, new and creative ways)
- synagogues and supplemental schools showing evidence of moving towards their site-specific visions through the implementation of "low hanging fruit" projects (e.g. becoming a synagogue that offers education for people of all ages, becoming more of a welcoming community that embraces its new members, having more *kavannah* at services)
- synagogues and supplemental schools maintaining their vision even in the face of staff and lay turnover
- synagogue professional and lay leaders engaging in a continuous process of moving towards their institutional goals and then setting new goals once the original goals are met
- increased capacity for building and expanding strong professional and lay leadership
- improved communication and reflection skills among synagogue leaders
- increased patience among synagogue leaders for both the process and product of change
- the SIP Committee process becoming the synagogue community's process:
i.e. the SIP philosophy of broad-based decision-making permeating the whole synagogue and changing the way the synagogue operates

Title of Synagogue Change Project: Synagogue Initiative Program (S.I.P.)

Perceived Outcomes to Date ("What's Happening?"):

1) IMPLEMENTATION:

- SIP has successfully assisted two pilot congregations in implementing an integrated-systems approach.
- Both congregations have set up broad-based SIP committees that meet once or twice a month.
- Both congregations have participated in exercises, workshops, and study sessions about synagogue/school systems change with consultants.
- Both congregations implemented a visioning process.
- Both congregations implemented a survey of their institutions to better understand their community's constituents and needs.
- Two conferences were held to assist the synagogues in ongoing collaboration, planning, lay leadership development, and team building.

2) IMPACT:

Note: A change process takes at least 5 years for its goals to be realized. The pilot congregations are still in the first years of their change processes. However, the pilot congregations are "on track" in moving towards the overall goal of systems change. Both synagogues are "on a course of triggering total engagement" among their membership. Evidence to date:

- broad-based decision-making that involves input from various constituencies in the synagogue and school
- institution of new board and committee structures that reflect greater integration of the synagogue's various functions and constituencies
- increased integration between the school and synagogue
- development of a vision and mission statement to serve as the basis of planning and goal-setting
- implementation of new action plans that reflect each synagogue and school's vision and goals
- increased capacity of professional and lay leaders through leadership development workshops

Synagogue-specific examples:

Emanuel:

- "totally revamped their school" to a school for people of all ages
- evidence of "out-of-the-box" thinking and broad-based decision-making
- implemented "*Torat Hayim*" program in which parents contract to be part of the learning process by participating on Shabbat and Sunday mornings approximately 3 times per month
- implemented a new pre-school family program for unaffiliated and affiliated members with children

- Ritual Committee now interfaces with other synagogue committees such as Brotherhood and Family Education Committee
- Membership Committee now interfaces with SIP Committee in planning for welcoming and outreach activities to community and school families

Kol Chaverim

- reorganized the board by instituting a new lay leadership position ("Vice President of Education") to coordinate all educational activities in the synagogue (adult education, youth education, family education, and Tot Shabbat)
- SIP Committee formed two sub-committees: one focused on lifecycle and ritual and the other focused on making the synagogue and school more "welcoming"
- "SIP permeates the way they do business" (e.g. The educator contacts the ritual, membership, adult education, and youth committees in the planning phases of implementing educational programs in the school).
- SIP Committee involved in discussing plans for a new building
- school and synagogue communities are more integrated and "seamless"
- Consistent with the synagogue's vision of becoming a more spiritual community, the rabbi, educator, and SIP Committee's Sub-Committee on Lifecycle and Ritual are collaborating on the development of a new intergenerational curriculum to educate the synagogue community about various Jewish rituals and lifecycle events.
- Consistent with the synagogue's vision of becoming a more welcoming community, the SIP Committee is developing a brochure for new and prospective members and a "matching" program that matches new synagogue members with "*vatikim*"; the program consists of 6 events during the course of a year and culminates in a New Members Shabbat.

Title of Synagogue Change Project: Synagogue Initiative Program (S.I.P.)

Hunches Re: Factors Linked to "Success":

1) CHARACTERISTICS OF SYNAGOGUES

- knowing how to process conflict
- openness to risk-taking
- money; financial resources
- in-house expertise in areas such as public-relations and change management
- unclear about role of the rabbi: may be easier, process-wise, to have the rabbi on board, but he may not be necessary for change to happen
- readiness pieces are key: organizational criteria of readiness that are pre-requisites to involvement in SIP and which were used as selection criteria for participation in SIP. Readiness criteria include:
 - stability and charisma of lay leaders
 - stability of professional staff
 - history of professionals and lay leaders working together;
strong collaborations between lay leaders and professionals
 - mutual respect between lay leaders and professionals
 - internal champions for the change project
 - professional and lay leaders with vision;
a synagogue that has a vision and that looks at goals and purposes
 - absence of side-agendas (so that synagogue leaders can focus on SIP)
 - basic administrative competence
 - resources: time and \$
 - a "can-do" culture
 - a positive political climate
 - a sense of institutional pride
 - a tolerance for process as well as for product

2) CHARACTERISTICS OF THE CHANGE PROCESS:

- some kind of consulting structure in place that is ongoing; someone to help synagogues walk through the process (at meetings and 'backstage')
- consultants who can play a nurturing role: being able to hold hands and take synagogue leaders (lay and professional) through the change process
- ideal for the consultant to be a local person who can be there in person and serve as a confidante to synagogue leaders ("The consultant from the Boston BJ was wonderful but she was too far and wasn't on-site")
- "wraparound": need to build strong lay and professional leadership that can eventually implement the change process and the action plan without the consultant
- capacity-building programs for professional and lay leaders
(e.g. classes at Hebrew College's Hartford Branch, conferences, and workshops)

- need to ripple it out to other committees within the synagogue so that it becomes part of how the synagogue thinks (not just the 15 people who are involved in the change process, or else the process won't take hold & the 15 people will get tired out)
- process that includes needs assessment of congregants, including the collection and analysis of demographic data about the synagogue community
- process to build lay/professional relations
- providing assistance to synagogues in forming the vision and the action plans
- built-in encouragement of experimentation and risk-taking (not viewing risk-taking as failure or success)
- leadership training for professionals and lay leaders (to build capacity and to train leaders in such areas as conflict management)
- models to guide the process

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 1

Title of Synagogue Change Project: Synagogue Leadership Initiative

Sponsoring Agency: UJA-Federation of Bergen County and North Hudson

Sources of Data (interviews & written materials):

Interviews:

- Frieda Huberman-4/14/98

Written Materials:

- "Brainstorming: Community Ponders How to Enhance Synagogue and Jewish Life", The New Jersey Jewish Standard, Volume LXVI, No. 22, Friday, March 27, 1998, p. 6
- Program: Synagogue Leadership Symposium 3/22/98
- SLI Fact Sheet 2/97
- Summary: Program Overview and Short-Term Projections
- Synagogue Leadership Consultation Meetings: Feedback
- Synagogues Who Have Participated in SLI Activities: Consultations, Symposium, and/or Seminar
- Temple/Codes (of participating Bergen County SLI synagogues): 8/21/97

Address and Phone # For Learning More About This Change Project:

Frieda Huberman (201) 488-6800 x348
Director of Synagogue Leadership Initiative
UJA-Federation of Bergen County and North Hudson
111 Kinderkamack Road
River Edge, NJ 07661

Sponsoring Agency Type:

- ☐ national organization
- ☐ central education agency
- ☒ federation or continuity commission
- ☒ foundation
- ☐ movement, movement-affiliated college or other organization
- ☐ individual synagogue

Type of Synagogue Change Project:

- ☐ planned total synagogue change
- ☐ planned total synagogue school change
- ☐ planned change targeted to one aspect of synagogues at a time
- ☐ 'organic' unplanned change
- ☒ to be determined
- ☐ national
- ☒ regional
- ☐ one synagogue

Movement affiliation of synagogues involved in this change project:

☒ Trans-denominational

☒ Orthodox

(Note: Northern New Jersey has many Modern Orthodox synagogues)

☒ Conservative

☒ Reform

☒ Reconstructionist

of Participating Synagogues: 39

Names & Characteristics of Participating Synagogues:

(Note: Four synagogues registered for the 3/22 symposium but did not attend. Two synagogues registered for the 5/26 self-assessment seminar but did not attend. Two synagogues participated in leadership consultation meetings but did not attend the March symposium or the May seminar.)

| <u>Name</u> | <u>Location</u> | <u>Size</u> | <u>Movement</u> |
|--|---------------------|-------------|-----------------|
| •Beth Tikvah New Milford Jewish Center | New Milford | 225 members | Conservative |
| •Congregation Adas Emuno | | | Reform |
| •Congregation Ahavath Torah | Englewood | 576 members | Orthodox |
| •Congregation Beth Aaron | Teaneck | 250 members | |
| •Congregation Beth Am | Teaneck | 95 members | Reform |
| •Congregation Beth Chavairuth | Englewood | 47 members | Reform |
| •Congregation Beth Israel of Northern Valley | Bergenfield | 266 members | Conservative |
| •Congregation Beth Sholom | Teaneck | 335 members | Conservative |
| •Congregation Beth Tefillah | Paramus | | Orthodox |
| •Congregation B'nai Israel | Emerson | 201 members | Conservative |
| •Congregation B'nai Yeshurun | Teaneck | 409 members | Orthodox |
| •Congregation Chavurah Beth Shalom | Tenafly | | unaffiliated |
| •Congregation Kanfei Shajar | Teaneck | | Conservative |
| •Congregation K'hal Adath Jeshurun | Paramus | 30 members | |
| •Congregation Rinat Yisrael | Teaneck | 180 members | Orthodox |
| •Congregation Shaare Zedek | West New York | | Orthodox |
| •Congregation Shaarei Geulah | Englewood | | Conservative |
| •Congregation Shomrei Emunah | Englewood | 75 members | Orthodox |
| •Congregation Sons of Israel | Leonia | 130 members | Conservative |
| •Glen Rock Jewish Center | Glen Rock | 230 members | Conservative |
| •Jewish Center of Teaneck | Teaneck | 670 members | Conservative |
| •Jewish Community Center of Fort Lee | Fort Lee | 520 members | Conservative |
| •Jewish Community Center of Paramus | Paramus | 500 members | Conservative |
| •Kol Hanesamah | Englewood | | Conservative |
| •New Synagogue of Fort Lee | Fort Lee | 450 members | Conservative |
| •The Roemer Synagogue | Teaneck | 95 members | Orthodox |
| •Temple Beth El | Hackensack | 160 members | Conservative |
| •Temple Beth El of North Bergen | North Bergen | 90 members | Conservative |
| •Temple Beth El Northern Valley | Closter | 467 members | Reform |
| •Temple Beth Haverim | Mahwah | 200 members | Reform |
| •Temple Beth Israel | Maywood | 60 members | Reconstruc. |
| •Temple Beth Or | Washington Township | 400 members | Reform |
| •Temple Beth Sholom of Pascack Valley | Park Ridge | | Conservative |
| •Temple Emanuel | Ridgefield Park | 50 members | |
| •Temple Emanu-el of Englewood | Englewood | 500 members | Conservative |
| •Temple Emanuel of Pascack Valley | Woodcliff Lake | 750 members | Conservative |
| •Temple Emeth | Teaneck | 500 members | Reform |
| •Temple Israel Community Center | Cliffside Park | 139 members | Conservative |
| •Temple Israel & Jewish Community Center | Ridgewood | 345 members | Conservative |
| •Temple Sholom | River Edge | 450 members | Reform |
| •Temple Sinai of Bergen County | Tenafly | 570 members | Reform |
| •Union for Traditional Judaism | Teaneck | | Conservative |
| •Young Israel of Fort Lee | Fort Lee | 112 members | Orthodox |
| •Young Israel of Teaneck | Teaneck | | Orthodox |

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 2

Title of Synagogue Change Project: Synagogue Leadership Initiative

Objectives of Project:

- to strengthen synagogues in the Jewish community that is part of the UJA-Federation of Bergen County and North Hudson
- to develop strategies to address challenges confronting synagogues
- to empower synagogues to transform the lives of Jews, Jewish families, and the Jewish community
- to engage community leaders to tackle challenges facing synagogues

Description of Change Project (the project's vision of synagogue life & the project's change process/"how it works"):

Vision of synagogue life:

- to create a caring, supportive community within each synagogue
 - to address the challenges of synagogues with large membership bases but low membership participation
 - to deepen the experience of the affiliated by:
 - a) addressing the needs of active, committed members
 - b) engaging in in-reach to the inactive, under-affiliated members of congregations
 - c) generating a sense of excitement so that "it's cool to be in shul!"
 - to reach out to the unaffiliated, including those who at one time had contact with synagogues, but do not currently see the relevance of affiliation to their lives
-
- to crystallize the mission of each participating synagogue
 - to provide leadership development to professional and lay leaders in synagogues
 - to envision the synagogue as a center of spirituality, lifelong learning and community of support (Beit Tefillah, Beit Midrash, and Beit Knesset)

Change process:

At its planning stage, the Synagogue Leadership Initiative encompasses three stages:

1) Engagement of Leadership: the convening of leadership consultation meetings which encourage synagogue leaders to begin a process of self-reflection by asking such questions as, "What do I want my synagogue to look like?".

2) Service Delivery:

A Spring Symposium (held 3/22/98) brought together 145 rabbis, congregational presidents, and other significant professional and lay leaders representing 39 of the Federation's 50 synagogues to explore the vision of the synagogue as an institution

that can transform the lives of individual Jews, reach the Jewish family, and shape the Jewish community. Among other components, the symposium included a keynote address by Rabbi Saul Berman of Yeshiva and Columbia Universities, and workshops focused on "translating the vision of the synagogue into reality" which highlighted synagogues that view themselves as having had successful change. The Symposium offered workshops on the synagogue as a Beit Midrash (presenters from Westchester Reform Temple and Kasirer Consulting), as a Beit Tefillah (presenters from the Hebrew Institute of Riverdale and Bnai Jeshurun), and as a Beit Knesset (presenters from Lincoln Square Synagogue and Congregation Agudath Israel of West Caldwell, NJ). An additional seminar on synagogue self-assessment was held on 5/26/98.

3) Research, Planning, and Development: Although the Federation is still early in its development of the Synagogue Leadership Initiative, it realizes that new financial, human, and programmatic resources need to be shared to assist individual synagogues in strengthening themselves. The Initiative projects the establishment of collaborative programs. Additionally, consultative services and ongoing workshops are anticipated.

History of Change Project (when it started, who started it, etc.):

The Synagogue Leadership Initiative planning process began in August, 1997. It is a joint venture between UJA-Federation and the Henry and Marilyn Taub Foundation. Mr. Taub is a philanthropist who lives in the Federation area and is active in the Avi Chai Foundation. In 1994 and 1997, the Avi Chai Foundation sponsored a synagogue change conference which inspired Mr. Taub to spearhead the same type of initiative in his own community. At the same time that Taub got interested in synagogue change, the Federation was actively involved in evaluating its own Jewish continuity efforts. One recommendation of the Jewish Continuity Commission at the Federation was to work on the issue of synagogue transformation. Essentially, the Synagogue Leadership Initiative emerged from "two concurrent percolations."

Synagogue Selection Process (how synagogues were selected to participate):

All 42 synagogues in the UJA-Federation of Bergen County and North Hudson were invited to participate in the Synagogue Leadership Initiative through letters, faxes, and phone calls to synagogue presidents and rabbis.

Role of outside consultants:

Lydia Kukoff (consultant) and Rabbi Saul Berman (rabbinic advisor) were both involved in the planning of the conferences on synagogue transformation sponsored by the Avi Chai Foundation. Henry Taub solicited their input for the development of the Federation's initiative.

Role of outside organization:

none yet, other than involved synagogues and the sponsoring Federation

The SLI is overseen by the Federation's Continuity Commission. Frieda Huberman, who is 4/5 time at the Federation, is the lead professional who coordinates the initiative and is responsible for "community engagement" and for convening the leadership consultation meetings and the leadership symposium.

How it is funded:

Year 1: Taub Foundation

Year 2: Taub Foundation and the UJA-Federation's Continuity Commission

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 3

Title of Synagogue Change Project: Synagogue Leadership Initiative

Definitions of "Success":

The Initiative has not yet officially defined "successful change". Participating synagogues have been encouraged to develop their own definitions of success through the leadership consultation meetings.

Title of Synagogue Change Project: Synagogue Leadership Initiative

Perceived Outcomes to Date ("What's Happening?"):

Since the project only began late in 1997, it is too soon to report perceived outcomes.

Title of Synagogue Change Project: Synagogue Leadership Initiative

Hunches Re: Factors Linked to "Success":

(Frieda Huberman's hunches based on her reading of the literature and her professional experiences):

1) **CHARACTERISTICS OF SYNAGOGUES:**

- vision (this is a must!)
- a stable professional and lay leadership
- professional-lay collaboration
- a starting point of stability, coupled with the sense that things can get better
- resources don't hurt and money is essential to make real change
- willingness to take risks and make modifications based on on-going evaluation

2) **CHARACTERISTICS OF THE CHANGE PROCESS:**

- availability of consultative and/or supportive services
- professional-lay collaboration

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 1

Title of Synagogue Change Project: Whizin Institute for Jewish Family Life

Sponsoring Agency: Whizin Institute for the Jewish Future

Sources of Data (Interviews & written materials):

Interviews:

Dr. Ron Wolfson 4/24/98

Address and Phone # For Learning More About This Change Project:

Dr. Ron Wolfson

(310) 476-9777 x789

RWolfWhiz@Aol.com

Whizin Institute for Jewish Family Life

University of Judaism

15600 Mulholland Drive

Los Angeles, CA 90077

(818) 789-2877

Sponsoring Agency Type:

- ☐ national organization
- ☐ central education agency
- ☐ federation or continuity commission
- ☒ foundation
- ☐ movement, movement-affiliated college or other organization
- ☐ individual synagogue

Type of Synagogue Change Project:

- ☐ planned total synagogue change
 - ☐ planned total synagogue school change
 - ☒ planned change targeted to one aspect of synagogues at a time
 - ☐ 'organic' unplanned change
 - ☐ to be determined
-
- ☒ national
 - ☐ regional
 - ☐ one synagogue

Movement affiliation of synagogues involved in this change project:

- ☒ Trans-denominational
- ☐ Orthodox
- ☒ Conservative
- ☒ Reform
- ☒ Reconstructionist

of Participating Synagogues: ?

Names & Characteristics of Participating Synagogues: ?

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 2

Title of Synagogue Change Project: Whizin Institute for Jewish Family Life

Objectives of Project:

- to train synagogue and community leaders in family education techniques
- to use a team approach to better the quality of family education implementation
- to send each synagogue team back home with a core group of influential family education supporters.
- to enable Whizin participants to return to their host institutions (including synagogues) with a new way of viewing these institutions

Description of Change Project (the project's vision of synagogue life & the project's change process/"how it works"):

Vision of synagogue life:

There is no one specific vision promoted. However, the Whizin staff aim to have teams return to their host institutions with the understanding that Jewish Family Education is not just an add-on program, but that it is a lever for institutional change.

Change process:

- invite leaders of Jewish institutions (including synagogues) to participate in a week-long summer institute, with the notion that they will come to Whizin and hear some of the best new approaches to Jewish Family Education and return home inspired
- emphasis is placed on attending Whizin's summer institute as a team and returning to the home community with that team in place
- teaches people the need to think systemically instead of programmatically

History of Change Project (when it started, who started it, etc.):

In 1989, Shirley and Arthur Whizin endowed the Whizin Center for the Jewish Future through a \$4 million gift to the University of Judaism. The mission statement was to create 3 academic institutes within this center that would explore the three areas of the family, the synagogue, and the Jewish community. The Whizin Institute for Jewish Family Life is the academic institute devoted to exploring the family. In 1989, Ron Wolfson gathered 20 experts in the field of family education to brainstorm new ideas; these experts continue to be a driving force in Whizin today.

Synagogue Selection Process (how synagogues were selected to participate):

Synagogue teams, inter-agency teams, and individuals (who are affiliated with synagogue schools and other Jewish educational institutions) apply to come to the summer institute. Each year, Whizin accepts a maximum of 125 people, giving preference to synagogue teams.

Role of outside consultants:

Whizin has a think tank, headed up by Ron Wolfson, twhich convenes each year to discuss and brainstorm the latest family education techniques. Many of these people serve as the faculty for the summer training institutes, including Helene Appelman, Joan Kaye, Vicky Kelman, and Susan Shevitz. Adrienne Bank has studied the effect of Whizin on the teams and their communities.

Role of outside organization:

The Whizin Institute is housed at the University of Judaism.

How it is funded:

Participants pay for accommodations and for class tuition for the summer institute. The Institute provides small grants to some synagogue teams. Individual synagogues often fund their team members. Some local communities also provide financial assistance.

MAP: SUMMARY OF SYNAGOGUE CHANGE PROJECTS-TEMPLATE PAGE 3

Title of Synagogue Change Project: Whizin Institute for Jewish Family Life

Definitions of "Success":

1) IMPLEMENTATION:

2) IMPACT:

- impact on Whizin participants: having teams return to their host institutions with the understanding that Jewish Family Education is not just an add-on program, but that it is a lever for institutional change

- impact on programming: successful change is when a Jewish Family Education program serves the vision initially set by the people implementing the program

Title of Synagogue Change Project: Whizin Institute for Jewish Family Life

Perceived Outcomes to Date ("What's Happening?"):

GENERAL COMMENTS:

Whizin staff think they have been successful but there is little data to back this up.

1) IMPLEMENTATION:

2) IMPACT:

- There have been big changes in the perspectives taken by institution's team members. After Whizin, participants view family education as more than merely a programmatic tool.

Title of Synagogue Change Project: Whizin Institute for Jewish Family Life

Hunches Re: Factors Linked to "Success"

GENERAL COMMENTS:

•There must be a personal transformation of the individual before change can be implemented in the institution.-Even in changing an institution, there must be personal transformation for the individuals involved.

•Successful synagogue change is not driven by theory; more often, it is a naturally occurring process.

1) CHARACTERISTICS OF SYNAGOGUES:

•need a charismatic individual to lead the change process

2) CHARACTERISTICS OF THE CHANGE PROCESS:

•need to have broad, flexible definitions of your change components (e.g. At Whizin, the definition of Jewish Family Educator was enlarged to include educators from a variety of traditional and non-traditional backgrounds, including social workers, rabbis, graduate students, librarians, and principals.)

MAP/GRID OF SYNAGOGUE CHANGE PROJECTS

| | Planned Total Synagogue Change | Planned Total Synagogue School Change | Planned Change Targeted to One Aspect of Synagogue at a Time | Organic Change |
|--|---|--|--|----------------|
| <i>National Organization</i> | <ul style="list-style-type: none"> Synagogue 2000 | | | |
| <i>Movement, Movement-Affiliated College or Other Movement-Affiliated Organization</i> | <ul style="list-style-type: none"> Experiment in Congregational Education (ECE) (Reform) UAHC's Partners for Synagogue Change (PSC) (Reform) | <ul style="list-style-type: none"> Cooperating Schools Network (Recon.) | <ul style="list-style-type: none"> National Jewish Outreach Program: Outreach Directors in Orthodox Synagogues and Turn Friday Night Into Shabbat (Shabbat Across America) Orthodox Caucus: L.E.A.D. Rabbinic Fellowship Program UAHC's Partners for Synagogue Change (PSC) (Reform) | |
| <i>Federation or Continuity Commission (Regional)</i> | <ul style="list-style-type: none"> Bergen County's Synagogue Leadership Initiative UJA/McKinsey Strategic Planning Workshop for Synagogues (NY) | | <ul style="list-style-type: none"> Boston Continuity Commission: Sh'arim, Me'ah, Youth Educator Initiative LA Council on Jewish Life: Synagogue Funding Program NY Continuity Commission Grants Philadelphia Continuity Commission: Friday Night Alive (with CMS Foundation) | |
| <i>Central Education Agency (BJE, etc.) (Regional)</i> | <ul style="list-style-type: none"> Hartford's Synagogue Initiative Program (S.I.P.) | <ul style="list-style-type: none"> Hartford's Synagogue Initiative Program (S.I.P.) | | |
| <i>Foundation</i> | | <ul style="list-style-type: none"> Designated School Program (Philadelphia) | <ul style="list-style-type: none"> CMS Foundation: Friday Night Alive (with Philadelphia Continuity Commission) ? Cummings Foundation + Carlebach Synagogue Koret Synagogue Initiative Whizin Institute (Jewish Family Education) | |

MAP/GRID OF SYNAGOGUE CHANGE PROJECTS

| | Planned Total Synagogue Change | Planned Total Synagogue School Change | Planned Change Targeted to One Aspect of Synagogue at a Time | Organic Change |
|-----------------------------|--|--|---|---|
| <i>Individual Synagogue</i> | <ul style="list-style-type: none"> ▪ Beth Am Israel (Penn Valley, PA) (Conserv.) ▪ Chizuk Amuno (Baltimore, MD) (Conserv.) ▪ Ramat Orah (New York, NY) (Orthodox) | | <ul style="list-style-type: none"> • ? Beth Jacob (MN) (Conserv.): "Making Shabbat Shabbat" • ? Carlebach Synagogue (NY) (Orthodox) • ? Congregation Bnai Jeshurun (NY) (Conserv.): Sacred Community + Singles Chavurah • Congregation Kehillath Jeshurun (NY) (Orthodox): Rethinking Outreach to singles and beginners • Kingsway Jewish Center (Brooklyn, NY) (Orthodox): Integrating FSU Immigrants • ? Temple Beth Israel (Port Washington, NY) (Conserv.): Jewish Music • ? Temple Beth Shalom of Orange County (CA) (Reform): Presidential Task Force on Education • Temple Israel Center (White Plains, NY) (Conserv.): Intergenerational Encounter • West End Synagogue (NY) (Recon.): Ldor VaDor: Shabbat As Framework for Family Education | <ul style="list-style-type: none"> • ? Congregation Bnai Jeshurun (NY) (Conserv.) • Germantown Jewish Center (PA) (Conserv. + Recon.) • Hamptons (Schneier) (NY) (Orthodox) • Lincoln Square (NY) (Orthodox) • Netivot Shalom (CA) (Conserv.) • Ramat Orah (NY) (Orthodox) • Valley Beth Shalom (CA) (Conserv.) • Wilshire Boulevard Temple (CA) (Reform) |

MAP/GRID OF SYNAGOGUE CHANGE PROJECTS

| | Planned Total Synagogue Change | Planned Total Synagogue School Change | Planned Change Targeted to One Aspect of Synagogue at a Time | Organic Change |
|---|--|---|---|-------------------|
| <i>Individual Synagogues Involved in More Than One Change Project</i> | <ul style="list-style-type: none"> Beth Jacob Congregation (Mendota, MN) (Conserv.): indiv. syn. change process + Avi Chai + Synagogue 2000 Congregation Beth Am (Los Altos Hills, CA) (Reform): indiv. syn. change process + ECE + Koret Congregation Beth David (Saratoga, CA) (Conserv.): Koret + Synagogue 2000 Congregation B'nai Jeshurun (NY) (Conserv.): 'organic change' + McKinsey + NY Continuity Commission grant Huntington Jewish Center (Huntington, NY) (Conserv.): NY Continuity Commission grant + Synagogue 2000 Lincoln Square (New York, NY) (Orthodox): McKinsey + NY Continuity Commission grant + Orthodox Caucus LEAD Rabbinic Fellowship Program Reconstructionist Synagogue of the North Shore (NY): Cooperating Schools Network + NY Continuity Commission grant Temple Beth Israel (Port Washington, NY) (Conserv.): McKinsey + NY Continuity Commission grant Temple Beth Shalom (Roslyn, NY) (Conserv.): McKinsey + NY Continuity Commission grant Temple Shalom of Newton (Boston, MA) (Reform): Boston COJC's Sh'arim + Meah + Youth Educator Initiative +ECE Town & Village (NY) (Conserv.): McKinsey + NY Continuity Commission grant + Syn. 2000 West End Synagogue (NY) (Recon.): Cooperating Schools Network + McKinsey + NY Continuity Commission grant Westchester Reform Temple (Scarsdale, NY) (Reform): ECE + NY Continuity Commission grant | | | |