



THE JACOB RADER MARCUS CENTER OF THE AMERICAN JEWISH ARCHIVES

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

Series D: Adam Gamoran Papers. 1991–2008.

Subseries 2: CIJE Meeting and Planning Files, 1991–1999.

Box
64

Folder
5

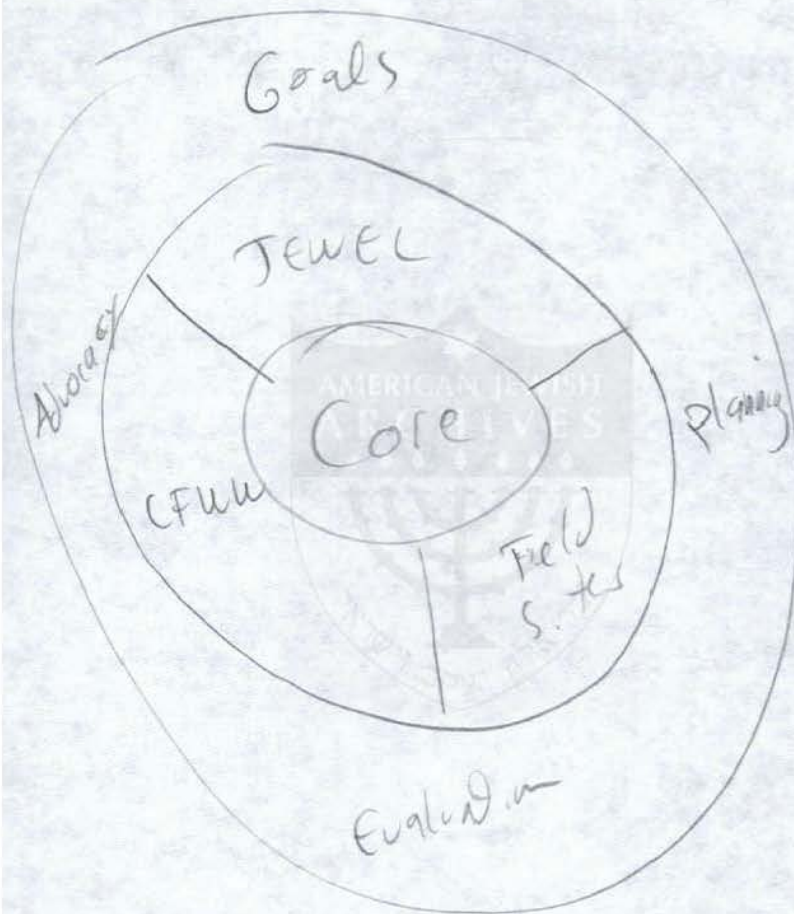
Minutes, correspondence, and notes. Strategic Plan drafts and presentation. CIJE staff retreat notes and supporting material, 1997.

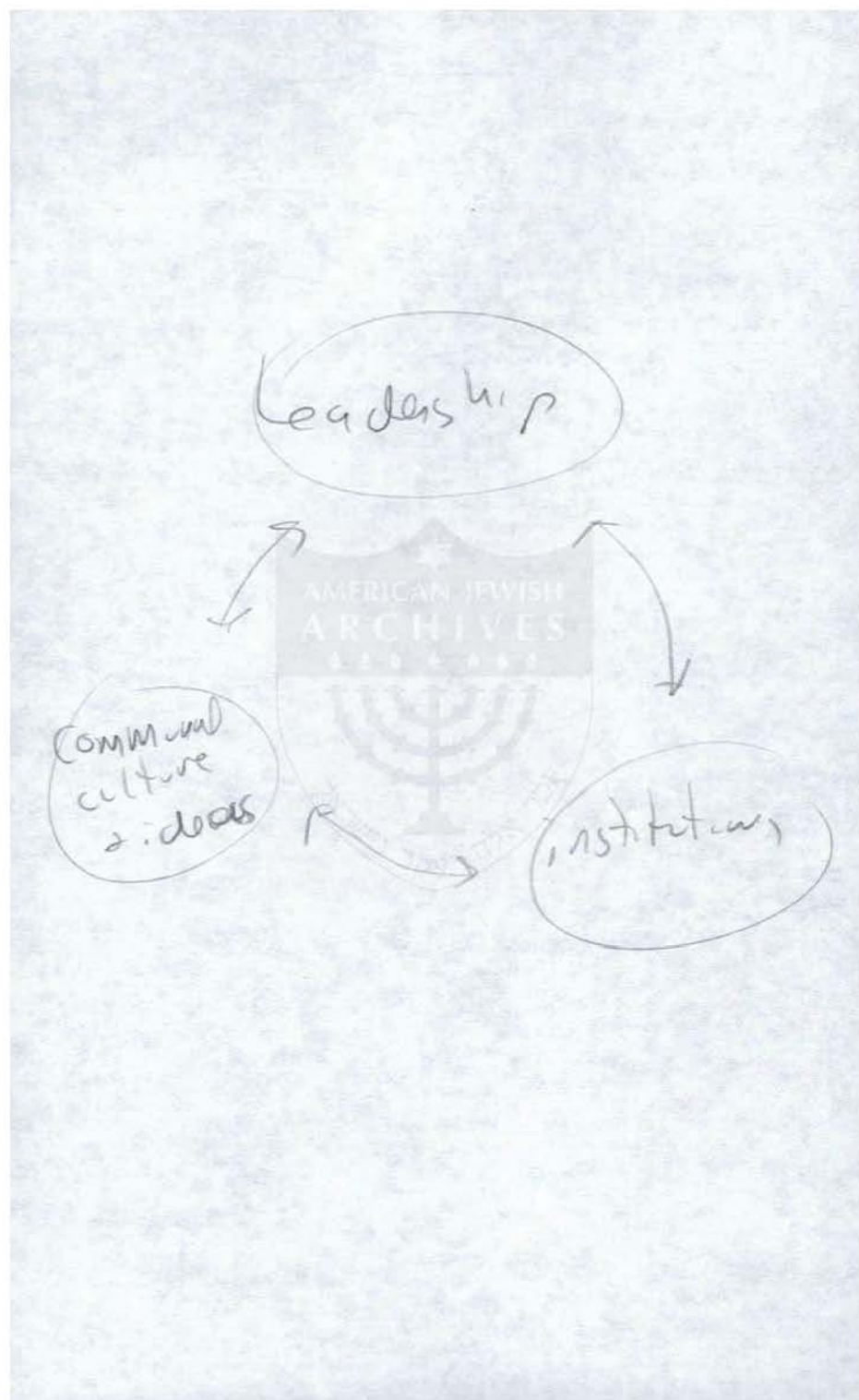
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Making it Work

- Project-based orgs
 - staffing
 - financial controls
 - fundraising
- evaluation of every project
- Mid-yr review + revision
- development of guiding principles

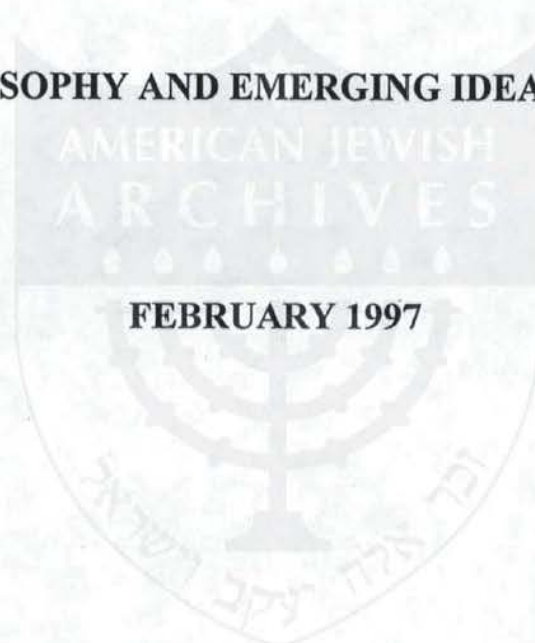
Strategic Initiative





DRAFT #3

CHANGE PHILOSOPHY AND EMERGING IDEAS ON STRATEGY



HOW WE BELIEVE INDIVIDUAL JEWS CAN CHANGE

Fundamental Belief

Explanation/Implications

The ultimate goal needs to be to transform the lives of individual Jews; to make being Jewish central to their lives and their quest for meaning.

We need to define success in terms of how we impact the minds and hearts of individual Jews and how that turns into action in their lives.

The "Direct Service" institution is the most important vehicle for changing the lives of individual Jews in North America. It is only by finding a sense of community within these institutions that Jews will become more committed to being Jewish.

Change needs to take place in institutions where Jews interface with Jewish learning and living (e.g., synagogues, schools, camps, JCCs) to make them more relevant and appealing to the majority of Jews. This means transformation of existing institutions. It may also mean building new institutions or creating new types of institutions. Any change program that does not ultimately transform "direct service" institutions is not worth investing in.

Multiple access points are needed to reach different types of Jews.

Change needs to happen across a broad range of direct service institutions to offer a diverse population of Jews the opportunity to connect with the tradition. Any type of institution that has potential to be a site for authentic Jewish learning and living should be included. Therefore focusing on one type of institution (e.g., day schools) is not the total answer.

The effect of multiple positive Jewish experiences on children and adults is synergistic. On the other hand, the effect of scattered, infrequent experiences is often nonexistent.

If resources are limited, it is better to concentrate resources so that they impact on a smaller number of individuals than to spread resources around so that they barely touch the lives of many people.

Family life is critical in the development of Jewish identity and commitment to Jewish living.

Change programs that focus on one age group are going to be less effective than those that focus on all age cohorts. Institutions need to be structured to support Jewish life in families.

WHAT WE BELIEVE ABOUT HOW INSTITUTIONS CAN CHANGE

Fundamental Belief	Explanation/Implications
Comprehensive Institutional change requires 6 things:	
1) <u>Leadership</u> is the most important factor in bringing about institutional change but (with the exception of the occasional genius) is not usually sufficient to bring about sweeping changes.	There needs to be an improved infrastructure to support the development of stronger lay and professional leadership for Jewish institutions.
2) <u>Vision</u> is the second most important factor. Vision cannot be created in a vacuum but must be supported by an "infrastructure of ideas."	An ongoing dialogue needs to be facilitated between the grassroots and the philosophical thinkers around the development of "big ideas." External facilitators will be needed to help institutions to adapt these ideas to their own situations.
3) <u>Cultural change</u> must be part of any change program. Without a real shift in mind set, change will not be ambitious enough and is unlikely to stick.	Institutional change programs need to explicitly address the culture of the institution. Tools need to be developed to help in this endeavor.
4) An explicit <u>change process</u> is needed as a road map for turning vision into reality.	Carefully specified methodologies need to be developed to help institutions through the difficult process of change. Ongoing evaluation needs to be a central piece of these methodologies.
5) <u>Skill-building</u> is needed to support the new methodologies and approaches initiated by change programs.	Training institutions need to become driven by their own vision of an educated Jewish leader and to build a program around that vision. New training programs or institutions may need to be created.
6) Sufficient and appropriate <u>funding</u> is needed to support a change process at the institutional level.	The funding approaches and methodologies of foundations and federations will have to change to focus resources on leadership development and institutional transformation, and to support longer time frames.

WHAT WE BELIEVE ABOUT HOW INSTITUTIONS CAN CHANGE - cont.

Fundamental Belief

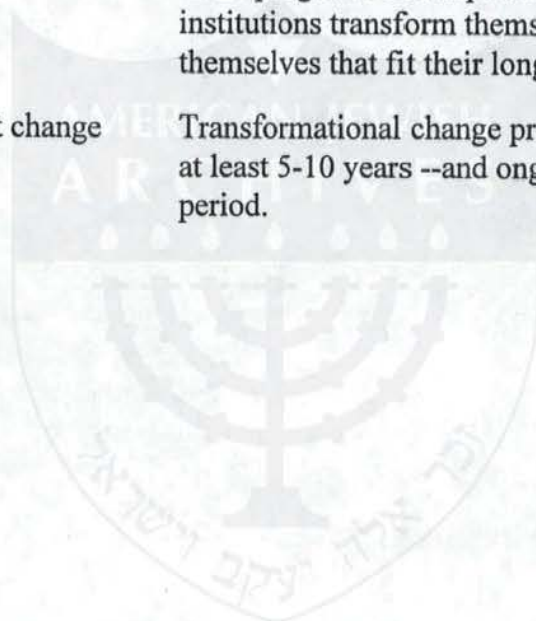
Explanation/Implications

Piecemeal changes in institutions do not work. The whole institution must change from the inside out.

Isolated programs (no matter how good) that are not part of a broader vision of institutional change are unlikely to be effective in bringing about long-term meaningful change, especially when those programs are imposed from the outside. We need to help institutions transform themselves and design pilot programs for themselves that fit their long-term change vision.

The time frame of change is longer than most change programs acknowledge up-front

Transformational change programs need realistic time frames -- at least 5-10 years --and ongoing support throughout that entire period.



WHAT WE BELIEVE ABOUT HOW CHANGE IS DISPERSED

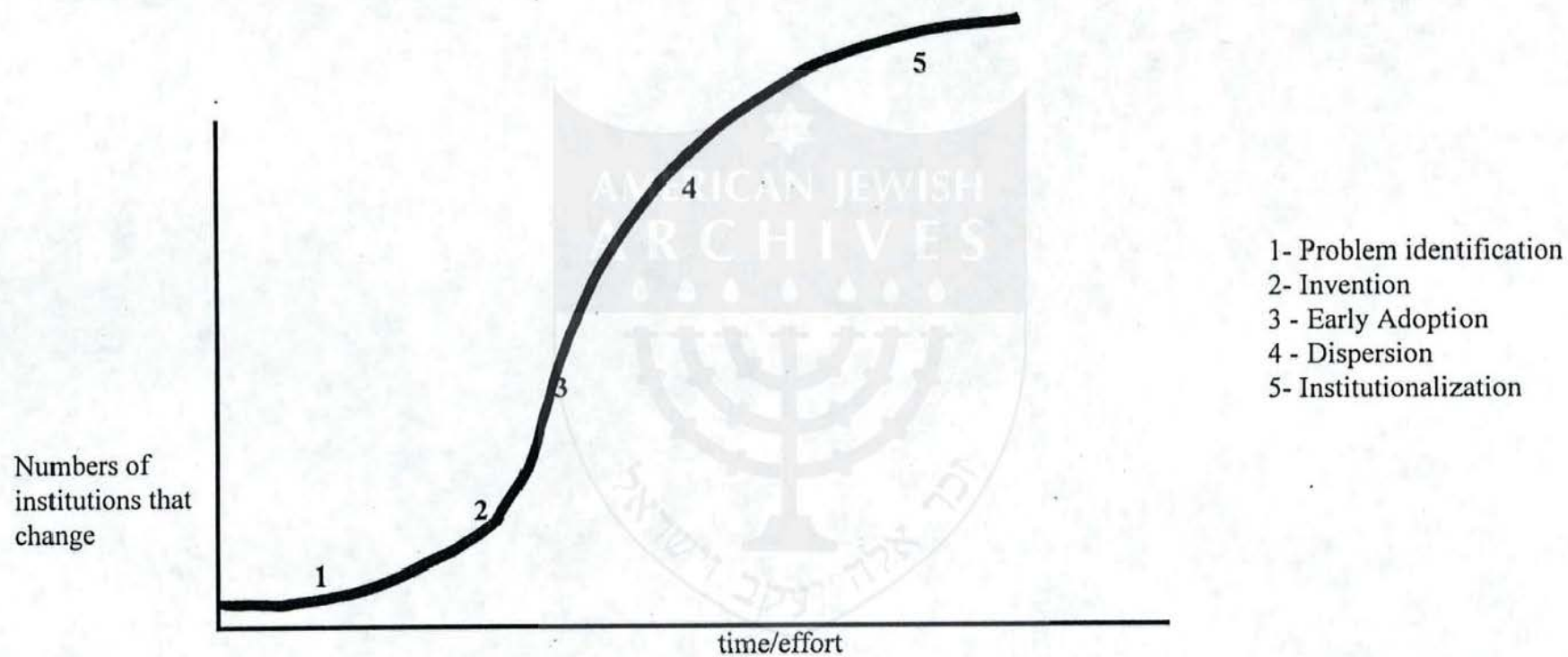
Fundamental Belief	Explanation/Implications
<p>There is a model of change called the “S” curve, that is often used to describe the dispersion of technology. While it is not a perfect way of describing changes in educational systems and other highly complex social systems, it is a useful tool for thinking about dispersion of change. It suggests that the process of change has 5 stages (see Exhibit 1)</p>	<p>The focus of change efforts has to be on the development of models and ideas for change and on the integration of these models into leading edge institutions.</p>
<p>1. <u>Problem awareness</u> - the growing awareness and understanding of a problem with no real action taking place.</p>	<p>It is better to focus energy and resources on leading edge institutions in order to create effective change models. (i.e. “invest in the best”) than to spread resources thinly across all institutions regardless of their readiness for change.</p>
<p>2. <u>Invention</u> - the development of new models and ideas to solve the problem.</p>	
<p>3. <u>Adaption</u> - the integration of those new models and ideas into leading edge institutions.</p>	
<p>4. <u>Dispersion</u> - The acceptance of the new ideas by the majority of institutions.</p>	
<p>5. The <u>institutionalization</u> of the new ideas and the slowdown in the rate of change.</p>	
<p>Jewish educational change is at stages 2 and 3.</p>	

WHAT WE BELIEVE ABOUT HOW CHANGE IS DISPERSED - cont.

Fundamental Belief	Explanation/Implications
There is a "tipping point" phenomenon* that can lead to rapid improvement in results when a critical mass of resources are concentrated in one place. (*see enclosed article)	Change programs are likely to be more effective if they apply enough energy in one place to reach the tipping point.
Change needs to happen in the way that institutions work together as a system.	The roles of different institutions and the boundaries between them need to be reconsidered to improve the functioning of the whole system.
Change needs to happen in the national infrastructure that supports direct service institutions (i.e. training institutions, movement, foundations)	National institutions need to develop their own change vision and process for supporting the change efforts of direct service institutions
Federations and central agencies can be an important vehicle (in some cases the most important vehicle) for planning and achieving transformation in direct service institutions. This importance is likely to vary from community to community.	Each community's landscape needs to be carefully assessed and a strategy developed for change that is specific to that community's situation.

THE PROCESS OF CHANGE

Exhibit 1



CRITICAL CHALLENGES AND ISSUES IDENTIFIED IN STRATEGIC PLANNING INTERVIEWS

Interviewees had a wealth of ideas about how to enhance the vitality of American Jewish life and Jewish education. Some of the critical emphases and issues are summarized below.

1. A vision for the future

When asked what a more vital Jewish community of the future would look like, interviewees pointed in varied directions. Some emphasized the centrality of learning to Jewish life across different stages of the life-cycle. Others painted a community which offered substantially richer opportunities than are currently available for seekers in quest of a richer spiritual life that speaks to the need for meaning and transcendence. Others imagined an inclusive community in which various groups now pushed to the margins of Jewish life -- e.g. the gay community, secular Jews -- are embraced and allowed to enrich Jewish cultural life. Another pointed to a world in which compelling but, for many, yet-to-be-devised intellectual frameworks serve to integrate modern sensibilities and beliefs with central Jewish categories, thus ending the split in the contemporary Jewish consciousness. Another identified a future in which, informed by Jewish texts and sensibilities, Jews actively interpreted and addressed the critical moral, ecological and social challenges presented by contemporary life. Finally, while some imagined a Jewish future in which Judaism's distinctive religious insights and practices are at the center of Jewish life, and felt that it was only as such that Judaism would prove strong, others aspired to a Jewish community that featured a variety of diverse streams, both religious and secular.

2. Is there a crisis and, if so, what can we do about it? Where we now are: the optimism/pessimism continuum.

Is there a crisis? While many feel that Jewish cultural life is in a state of disrepair (as witnessed by demographic data), at least one person suggested that there is no "problem" requiring revitalization. The so-called problem is only a problem for traditional "establishment" institutions that are losing their social support; at the same time as this is happening, other forms of Jewish life, e.g. those associated with the Jewish Renewal movement are spontaneously coming into being and engaging the human energies of many.

Can the demographic crisis be meaningfully addressed? One person expressed the view that we are naive to think that the majority of American Jews can be engaged in Jewish life under modern conditions. At the other extreme, another expressed the view that we already possess the knowledge needed to develop educational institutions capable of revitalizing American Jewish life. In between are many who are cautiously optimistic and who urge the need for: new ideas about the nature and significance of Jewish life; new institutional forms (both communal and educational); new target populations; and higher quality leadership and other personnel.

3. Leadership

A number of individuals felt that the key to transformational change is dynamic leadership. Different kinds of leaders emerged as critical for different interviewees.

For some, high-quality, wealthy lay leaders seemed critical. A concern was expressed that there are not many young leaders of this kind on the horizon.

Others emphasized a critical need for "change-experts" -- for change agents and consultants who could help Jewish institutions develop and implement their change-agendas.

Others focused on charismatic congregational rabbis and emphasized the need to reconstruct rabbinic education so that rabbis could more readily meet the most critical challenges before them. Though there was a general sense that the roles of rabbis needed to be reconceptualized, different ideas were expressed about this reconceptualization. Ideas mentioned included: rabbi as teacher (especially of adults); rabbi as spiritual guide; and rabbi as community organizer.

4. Institutions

To repair or not to repair. Some interviewees were confident that, with appropriate inputs, existing institutions (for example, synagogues and schools) could be meaningfully repaired and urged investment in these primary institutions. Synagogues, day schools, and congregational schools were identified as arenas in which meaningful intervention is possible and desirable; what stands in the way is not inability but a failure of communal energy and will. It was suggested that outreach efforts that bring people into these existing institutions are unlikely to bear fruit if the institutions do not have something meaningful to offer those who walk in the door; there needs to be a message and responsiveness to people's needs. At the same time, some interviewees were skeptical that existing institutions could be transformed into adequate institutions for the American Jewish community. For example, the view was expressed that synagogues are so pathological as to be beyond repair, and a concern was expressed that by their very nature they seem always far behind and therefore unresponsive to the needs and concerns of their constituencies.

New institutional forms. Skeptics concerning the prognosis for existing institutional types, as well as some of their supporters, urged the development of new kinds of institutions that might more adequately address contemporary needs. New institutional forms that were proposed included: "virtual" universities, which while encouraging periodic face-to-face interaction, take advantage of interactive technologies like e-mail and video-conferencing; meditation centers; retreat centers; educational institutions organized around lodged in familial-settings; after-school programs, very different from supplemental programs, that meet parents' needs for after-school day care; internally

pluralistic institutions that meaningfully bring together individuals representing very different Jewish outlooks and ways of life; institutions in which the distinctive ways of each group would be honored but in which opportunities for meaningful engagement across group lines would be written into the pattern of organization.

5. Achieving high-quality institutions

Critical ingredients. One set of discussions focuses on the ingredients of such institutions. Different emphases were found in the interviews. Some mentioned the need for strong, charismatic leadership (of the Marshall Meyer variety). Others noted that existing institutions typically have no compelling message that will engage people, and that they are unlikely to be vital unless animated by powerful ideas. Still others noted that we tend to build our institutions without attention to the felt-needs and rhythms of our potential constituencies, expecting them to adapt to us rather than the other way around; attention and responsiveness to the needs of relevant constituencies in designing institutional life is essential.

Design and/or fostering natural growth. Some interviewees felt that we now know - or can come to know - a lot about the character of strong Jewish institutions, and that therefore the job of a responsible Jewish community is to encourage, guide, and support the development of these institutions in a systematic way. Others (often skeptical of our ability to design institutions that are attuned to "the needs of the customer") emphasized the desirability of nurturing a cultural context that encouraged and supported grass-roots efforts of various kinds -- young shoots, some of which might evolve into tomorrow's powerful oaks.

6. Powerful ideas

While some interviewees emphasized the need for new institutional forms and/or new target-populations, others emphasized the spiritual/intellectual poverty of contemporary Jewish life and articulated a need for Jewish ideas that would prove compelling to contemporary American Jews. Jewish institutions -- new or old, explicitly educational or not -- are unlikely to prove engaging unless they are suffused with powerful Jewish ideas, ideas that infuse with rich meaning the acts and activities we associate with Jewish life.

One person ventured the idea that the critical problem we face is that our understandings of such terms as "prayer," "God," and "mitzvah" presuppose a world-view that is no longer credible to many contemporary Jews; therefore the challenge is to develop a new intellectual framework that will give such terms a meaning that can more readily be identified with.

One interviewee suggested that there is a need for a kind of Aspen Institute in American Jewish life -- an institution that encourages our most powerful and creative minds to address our deepest questions and that feeds the American Jewish landscape with a stream of rich ideas that enrich and challenge our understandings of ourselves as Jews.

Other interviewees emphasized the importance of ensuring greater access to powerful Jewish ideas -- for example, through a journal, or by making sure that rabbinical students routinely have opportunities to study under the most profound contemporary thinkers (so that they can be influenced in the ways that another generation of rabbis was influenced by thinkers like Heschel and Soloveitchik).

7. Target-populations

How inclusive should the community be? There are various echoes of the in-reach/out-reach debate in the interview data. Some interviewees expressed the view that the Jewish community needed to be more inclusive than it now is -- finding ways to be more welcoming and engaging to women, to gays and lesbians, to secular Jews, and to others who typically feel marginalized by, and sometimes alienated from, American Jewish life. It was suggested that not only does the Jewish community have the obligation to reach out to such groups on terms that are welcoming and affirming, but that such groups have the potential to make important contributions to the quality of Jewish life. Another group thought to be underserved by the community today was identified as "seekers" -- that is, individuals in quest of religious meaning and transcendent experiences; typically, very little provision is made for them in the organization of Jewish life.

Target-populations for education. While some interviewees explicitly resisted (as "magic bullet" thinking) the notion that Jewish educational interventions should focus on a particular target-population, others suggested that given scarce dollars and human resources, it would be strategically wise to focus on special target-populations. While those who took this position shared the view that we have to stop thinking of Jewish education as something that happens between the ages of 5 and Bar/Bat Mitzvah, there were very different views expressed concerning what special target-populations needed the lion's share of attention:

a. Adult education: Some believed that once adults have become powerfully engaged in Jewish learning, the education of their children follows in due course.

b. Adolescence: The view was expressed that this is the stage in which adult identities get shaped and that therefore Jewish education needs to be at its most serious at this stage of the life-cycle.

c. Early childhood and family education: Not only was early childhood viewed by some as a critical stage in human development; it was also suggested that at this stage it would be possible to draw the whole family into the orbit of education, giving rise to meaningful forms of adult education and family education.

d. The secular community: Some complained about the absence of adequate educational resources being directed at America's secular Jews, even though many

American Jews fall into this category. It was urged that this group not be written off, and that meaningful ways be found to engage them.

8. Improving Jewish education

A variety of ideas were expressed in the interviews concerning the best way to improve the quality of Jewish education. Below are some of the central ideas that were expressed:

Improve the quality of Jewish educators. Consistent with CIJE's emphasis on personnel, many interviewees spoke to the importance of improving the quality of Jewish educators. Some spoke to the desirability of attracting and training new populations of Jews for whom the work of educating would represent a sacred act laden with personal significance; Jews-by-choice, post-career individuals, and Russian immigrants were offered as examples. Others spoke to the need of professionalizing the field of Jewish education via licensing, standards, and strong pre-service and in-service education. Still others spoke to the need to facilitate the personal religious growth of educators working in schools, camps and other settings via retreats and sabbaticals.

Strengthen the content of Jewish education. a) Some urged that progress depends on moving away from an emphasis on what to do and how to do it and towards an emphasis on the "whys" of Jewish life, the powerful ideas or insights that underlie Jewish practices. Put differently, Jewish educating institutions need to be suffused with compelling Jewish ideas. b) Others urged that Jewish educational environments need to be welcoming and responsive to the genuine questions and the honest doubts of learners; otherwise, they will continue to be alienating institutions. c) While several individuals mentioned the need to make "text" central to Jewish education, more than one urged that we adopt a broad understanding of "text," one that includes works of art which gave the power to engage contemporary seekers.

Relationship between experience and education. While implicit in many comments was the suggestion that access, via education, to powerful ideas about Jewish life would transform otherwise empty Jewish practices into meaningful experiences, a very different view was also expressed: it was suggested that the hunger for Jewish education only arises after one has already had powerful Jewish experiences. It is such experiences that catalyze the desire to learn. As an example, it was suggested that, for many individuals, it is only after they have been deeply moved by a religious service (such as those at Bnai Jeshurun in New York) that they develop a desire to engage in systematic study. This suggests that facilitating powerful Jewish experiences should be the starting-point to Jewish education.

Emphasize the non-academic quality of Jewish learning. It was suggested that the Jewish learning we need to foster differs from the academic Jewish learning found in universities; it needs to engage the heart, to speak to the living concerns of the learner.

Improved institutional settings. While some felt that the supplemental school was a

dead-end, at least one interviewee felt that, suitably supported and enriched, it could be a powerful educating institution: not the quantity, but the quality of Jewish education is decisive, it was suggested. The possibility of substantially improving day schools was also mentioned by some. Others emphasized the need for other kinds of educational settings, e.g., those identified as "informal" or familial settings.

Religion and/or peoplehood. While some felt that Jewish religious ideas need to be at the heart of any Jewish renaissance, others felt that peoplehood -- the sense of ourselves as an enduring people with a multiplicity of outlooks, religious and secular -- needs to be at the center of Jewish education.

9. Eradicating financial barriers to quality education

Developing an army of educators that are up to the challenge of Jewish education is a costly endeavor, requiring substantial investments in salaries and both pre-service and in-service education. In addition, the view was expressed that the absence of money should not be an obstacle to a quality Jewish education; the community must ensure that all children have the opportunity for a quality education, regardless of their financial resources.



agenda for 4/15 call 8:30pm

④ LI's

① TEI eval

③ Bill's status

② PD mapping

⑤ Eval Guide

- ADH - use for eval instt,
~~for friends~~
- call it a draft
- 20 hrs work is ok
- see if JESNA will polish
- AG, EG, BR, AB will work
- ~ 20 hrs to finish

Q's

1. connection of vision to strategy
- backwards mapping?
2. is the structure ^{multiple vs. single unit} clean enough for planning & budgeting?
3. How do we position ourselves so that CIST will be exciting enough to attract the quality of prof & lay leaders that desired?
4. all 3 units at once, or in sequence?
5. How can linkages w/ other nat insts help us implement plan more effectively?
6. Will the plan have adequate quantity of resources? ^{- esp. donor community}
7. How will we ensure the quality of the content in all the units.

Abraham Infeld

lay leadership devel

- lay leadership devel
- world leadership conference in Israel 1998
- "Renaissance weekend"
- regional conferences 1999
[ADH-CITE in 1999]
- h-se conference (5-600 lay leaders) in Israel 2000

LH - this is a powerful plan

- H - this is a powerful plan
 - expers in Baltimore
 - need to create critical mass, tipping pt
- Werner d.d not have a strategy for transforming parties into communal leaders
- MLM - this is off for -s

EG - we need research on lay partic
in T-communal life

- EG - we need research on lay partic
in T communal life
- we have hypoths abt barriers
 - SH/Hor - a great deal of insider/outside differences in Fed's
- KB - we need strategy for informed follow-up
- DR also need to look at ops for partic

MLM - recruit to placement

②

AG - what abt Congress?

ADH - this needs a design + a plan
- we have assignt
- design for res. and cont
w/ timeline



(900 families)
Westchester Reform Temple ③

DB - what were the critical elements
that allowed to so the ch?
(growth)

- ① not in crisis
- ② complete comfort of not state
- could have been seen as threatening
- ③ had gone through vic. in selection of rabbis
- ④ assessing ch readiness is key
- ⑤ culture of WRT manages transition in thoughtful & broadbased way

JC - disapp?
- that didn't go further, faster

ADH - outcomes >

- ① can quantify - more kids in confirmation & post confirmation
- ② oversubscribed "Shaving Shabbat" pg,
desire to expand
- ③ raised \$ for Center for Jewish life

MLM what outcomes abt what has
happened to their lives, would you
like to see in 10 yrs?
- ch reflects leadership w/ a vision.

Raman

④

DP — "visiting as a one-night-stand"

— contrast: visiting as a
long-term relationship
— deep, meaningful, profound



Strat plan

(5)

SH - how would JEWEL differ from CAPE (for not ed. is)?

KB - JEWEL could use CAPE
- not all progs can go to JEWEL

ADH - JEWEL + CAPE as part of one series of ed.

EG - mentoring & support for leaders
- call for not do

KB - JEWEL can bring in mid-career people to train them

LH - what is a successful consultancy?
- not at Fedt with pay

add to Core:

- devel + imp lemn of pilot projs

MLM - need stnt of pillos
- high stds



STRATEGIC PLAN PRESENTATION

Steering Committee
April 9th and 10th, 1997

PROJECT PLAN

PHASE 1	PHASE 2	PHASE 3	PHASE 4
Vision	Change Process	CIJE Mission and Vision	CIJE Strategy
What will the North American Jewish community look like if we succeed?	The process of getting from here to there?	CIJE's role in making it happen?	How will CIJE work towards fulfilling this role? How to refine this strategy on an ongoing basis?
25 yrs	25 yrs	10 yrs	5 yrs and 1 yr
September-October	November-December	January-February	March-April

SUMMARY OF OUR LONG-TERM VISION IN PROGRESS FOR THE NORTH AMERICAN JEWISH COMMUNITY

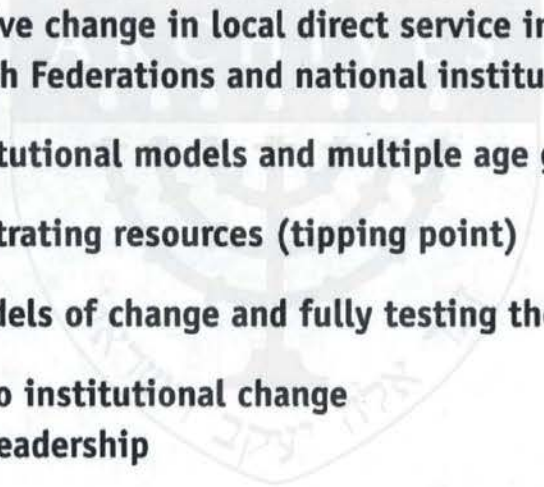
- **A JEWISH COMMUNITY WHERE THERE IS:**

- Centrality of Jewish learning
- Strong Jewish identity and Jewish values that permeate most aspects of life
- A high level of involvement in Jewish life and Jewish institutions
- Concern with social justice and a commitment to pluralism
- Strong leadership
- Innovation and energy

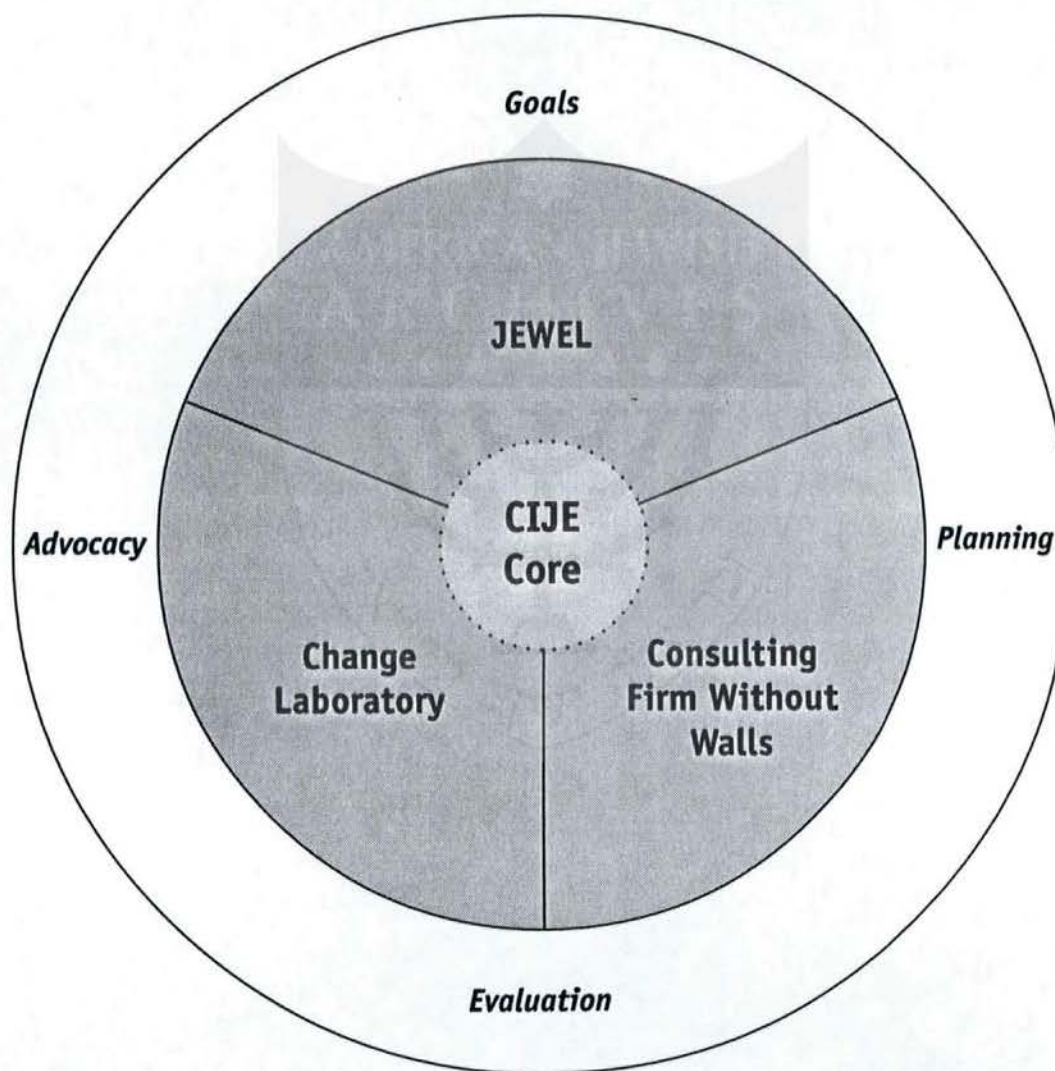
- **A SYSTEM OF EDUCATION WITH:**

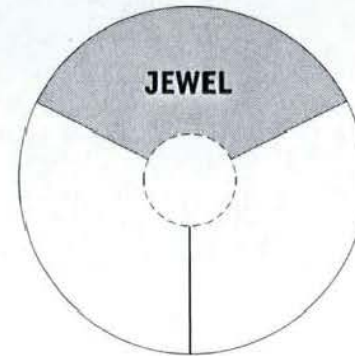
- High quality, vision-driven institutions providing a range of life-long learning opportunities
- Strong community support
- Talented, well-trained lay and professional leadership
- Well-trained, professional educators at all levels
- Inspirational rabbis who see education as integral to their work
- Content infused with meaning for those who participate

SUMMARY OF CHANGE PHILOSOPHY

- 
- **Focus on comprehensive change in local direct service institutions (schools, camps, synagogues, JCCs) with Federations and national institutions appropriately involved**
 - **Focus on diverse institutional models and multiple age groups**
 - **Importance of concentrating resources (tipping point)**
 - **Focus on building models of change and fully testing them—dispersion comes later**
 - **Six factors that lead to institutional change**
 - **Strong, committed leadership**
 - **Clear vision**
 - **Supportive culture (mind-set and attitudes of leadership and membership)**
 - **Skillful change process**
 - **Staff skills**
 - **Adequate funding**

CIJE 10-YEAR STRATEGIC PLAN





JEWEL

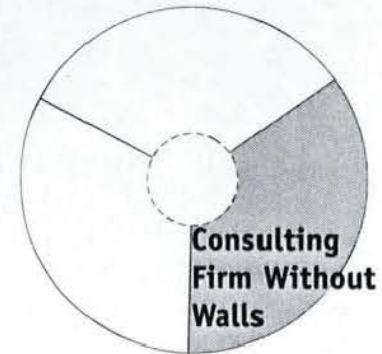
OBJECTIVE: Recruit and develop senior leaders for Jewish education

CONCEPT: An organization with four closely-linked functions

- planning for senior personnel needs
- recruiting
- training and development (in-service)
- placement

Target groups include:

- professionals (current and potential)
- lay leaders (current and potential)



Consulting Firm Without Walls

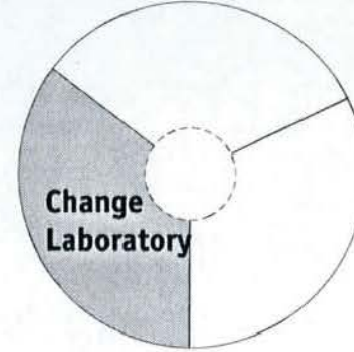
A “by invitation” network of consultants qualified to work on transformation of Jewish education institutions.

CIJE SERVICES

WOULD INCLUDE:

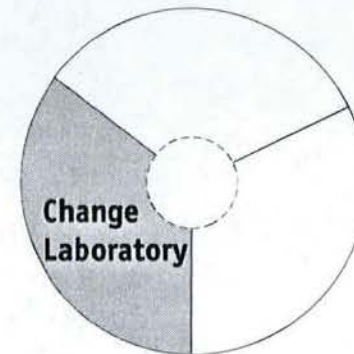
- Matching service between consultants and projects
- Help developing advisory boards
- Library of tools and ideas
- Courses and conferences for consultants
- Peer review process

Internal CIJE staff would manage the network.



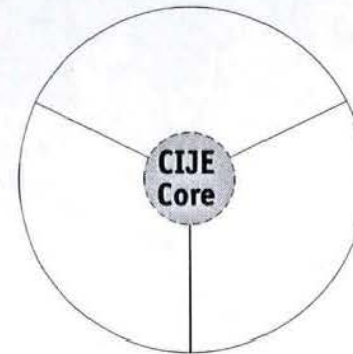
Change Laboratory

- **A laboratory for developing models of excellence in Jewish education and models of change processes**
- **A partnership of leading funders and organizations**
- **Institutions would be the main focus, but infrastructure/ systems issues would also be addressed**
- **Full-time evaluators would be employed to carefully document ongoing impact and challenges and to track “leading indicators” of success**



Options for Change Laboratory

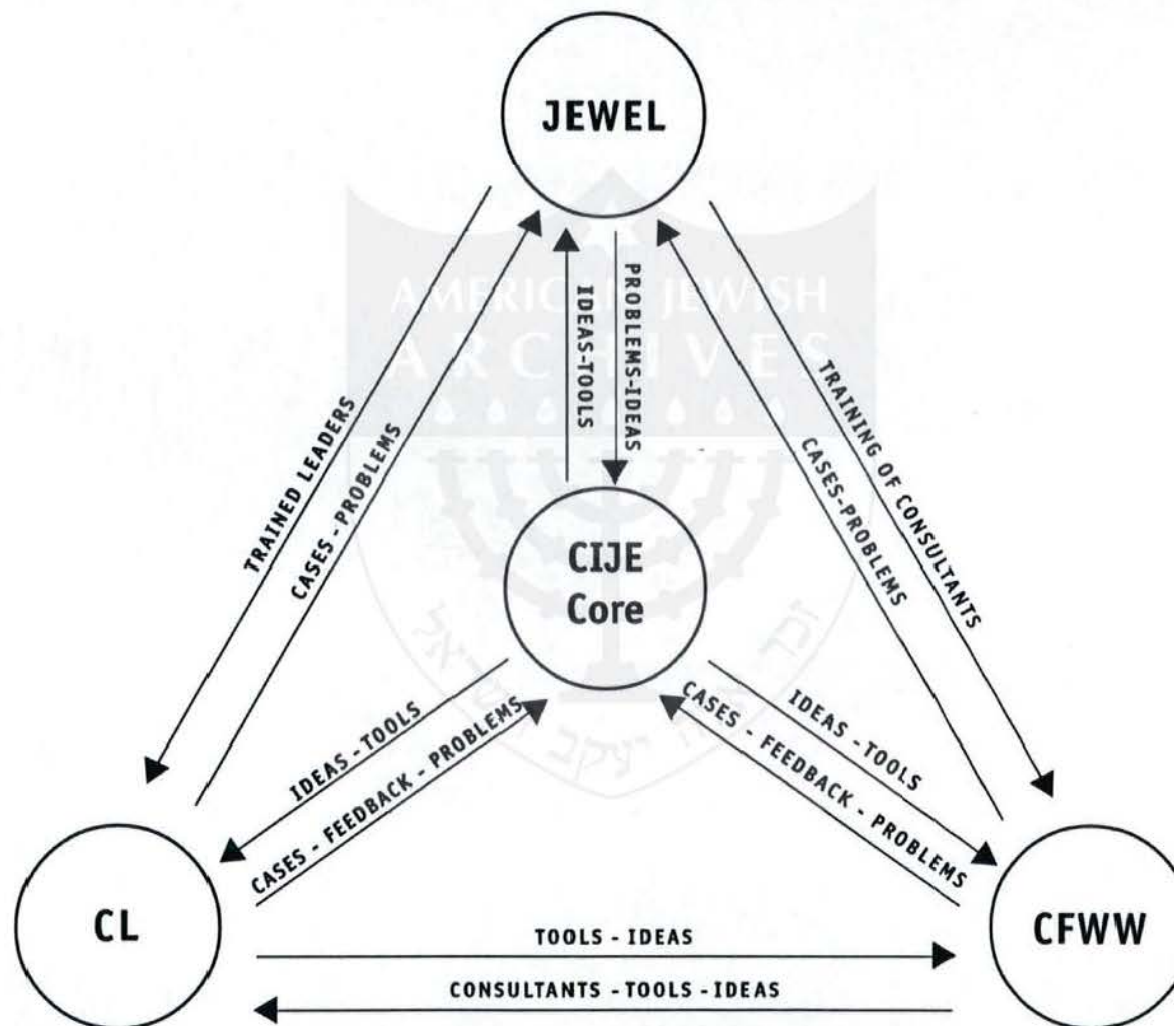
- Option A:** A cluster of institutions in one geographic location and the infrastructure that supports them (i.e. Federation, BJE, professional development, funding)
- Option B:** Networks of like institutions — like the Coalition of Essential Schools
- Option C:** One great institution of each type — day school, synagogue, supplementary school, camp, JCC, etc.
- Option D:** Change-ready institutions, regardless of type and location



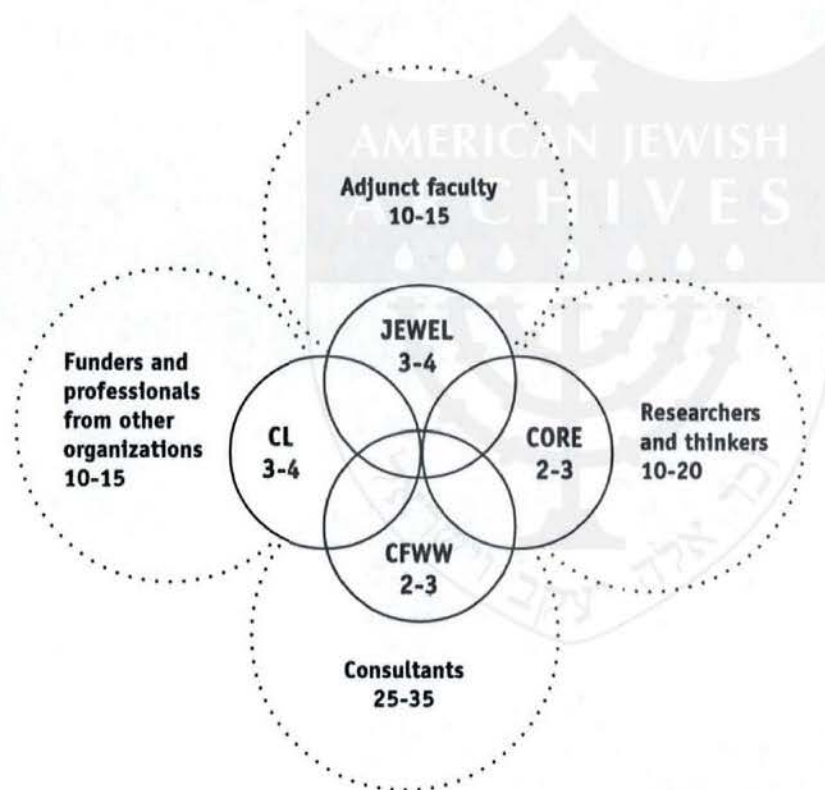
CIJE Core: The Concept

- In addition to administration, the core of CIJE would have five areas of focus:
 - Supporting or conducting research and consultations on key issues in Jewish Education
 - Producing a journal and policy briefs
 - Creating materials and providing faculty for training programs
 - Running conferences on topics critical to our work
 - Communicating about the work of CIJE and others
- An advisory board of lay and professional leaders, including members of the CIJE Steering Committee, would help set an annual agenda of 2–4 issues to be tackled. This list would feed into and/or respond to the current work of CIJE. The end product of a project could be a curriculum, a set of tools, a publication, a program or even a spin-off institution.

STRATEGIC INTEGRATION/SYNERGIES



PERSONNEL: WHAT WILL IT TAKE TO DO THE JOB?



Very Preliminary



Inside the institution



Outside the institution

Projected:

TOTAL INTERNAL* 10-14

TOTAL EXTERNAL** 55-85

Current:

TOTAL INTERNAL* 7 1/2

TOTAL EXTERNAL** 20

* Excludes administrative Staff

** External personnel includes professors & consultants to CIJE

INITIAL GOALS AND OBJECTIVES

ILLUSTRATIVE ONLY

PROJECT	OBJECTIVES	SPECIFIC GOALS	EVALUATION METHODOLOGY
JEWEL	<ul style="list-style-type: none"> - Pilot programs for 4 target groups - Complete a planning process for a more broad-based institution - Create and pilot a personnel planning, recruiting and placement methodology 	<ul style="list-style-type: none"> - Provide opportunities for reflection and development for: <ul style="list-style-type: none"> • 25 lay leaders • 20 senior educators • 100 principals and teacher educators • 25 Rabbis 	In-depth before and after, structured interviews with a sample of participants to assess change in practice
CHANGE LABORATORY	<ul style="list-style-type: none"> - Form a working team and build detailed plan for the inside design of each change project - Start work with institutions and begin to achieve measurable results 	<ul style="list-style-type: none"> - Make measurable progress toward increasing the levels of Jewish involvement and identity among the families impacted by at least 5-10 institutions in the program 	"Leading Indicators" methodology
CIJE CORE	<ul style="list-style-type: none"> - Produce significant tools for change and for "seeding the culture" that are being used in the field 	<ul style="list-style-type: none"> - Conduct 20-25 consultations or studies that are used by practitioners inside and/or outside CIJE 	"Market research" to determine whether, and how, the work is being used
CONSULTING FIRM WITHOUT WALLS	<ul style="list-style-type: none"> - Begin to build the capacity available to CIJE and to Jewish institutions for consulting on change 	<ul style="list-style-type: none"> - Create a network of 25-35 high-quality consultants working on transformation projects in 50-75 Jewish institutions 	Peer review interviews with clients

THREE YEAR TIME LINE

ILLUSTRATIVE ONLY

	1998	1999	2000
JEWEL	<ul style="list-style-type: none"> - Research models of leadership development - Start community research - Pilot training programs: <ul style="list-style-type: none"> • TEI • Rabbis • Principals • Federation lay leaders 	<ul style="list-style-type: none"> - Pilot recruiting and community planning programs - Start planning for JEWEL as an institution - Pilot training programs: <ul style="list-style-type: none"> • Institutional lay leaders 	<ul style="list-style-type: none"> - Pilot placement program - Complete planning for JEWEL - Pilot training programs: <ul style="list-style-type: none"> • Senior educators
CHANGE LABORATORY	<ul style="list-style-type: none"> - Form work team - Plan inside design of initial projects - Develop evaluation methodology 	<ul style="list-style-type: none"> - Start 2-3 institutional projects - Plan 2-3 infrastructure projects - Plan inside design of next group of projects 	<ul style="list-style-type: none"> - Expand to 10-12 institutional projects - Start 2-3 infrastructure projects
CONSULTING FIRM WITHOUT WALLS	<ul style="list-style-type: none"> - Recruit consultants - Develop guiding principles - Hold first conference 	<ul style="list-style-type: none"> - Create a database - Develop tools - Hold 2nd conference - Hold 2-3 special interest conferences 	<ul style="list-style-type: none"> - Expand consulting network and tools - Hold 3rd conference - Expand specialist conferences
CIJE CORE	<ul style="list-style-type: none"> - Form Advisory Board - Conduct 2-4 projects 	<ul style="list-style-type: none"> - Conduct 2-4 projects 	<ul style="list-style-type: none"> - Conduct 2-4 projects

STAFF RECRUITING TIMETABLE

ILLUSTRATIVE ONLY


		1998	1999	2000	2001	2002
Inside* CIJE	JEWEL	1	①	0	1	0
	CL	①	1	1	0	0
	CFWW	①	1	0	1	0
	CORE	1	0	0	0	1
	TOTAL	4	3	1	2	1
Outside CIJE	JEWEL	2	2	2	2	2
	CL	5	2	2	2	2
	CFWW	5	5	5	5	5
	CORE	2	2	2	2	2
	TOTAL	14	11	11	11	11

*Circle indicates a leadership position

HOW STRATEGIC PLAN BUILDS ON CURRENT PLAN

	Current Projects	What is different
JEWEL	Goals Seminar Lay/Professional Seminars TEI Principals Seminar Evaluation Institute Milwaukee lay leaders	<ul style="list-style-type: none"> • Separate modules would be integrated into one curriculum • No more one-shot programs • Carefully targeted programs tailored to specific groups with evaluation and follow through
CHANGE LABORATORY	Early Childhood Leading Indicators Pilot Goals Projects	<ul style="list-style-type: none"> • Ideas would be developed and tried in a laboratory environment and carefully monitored
CFWW	Goals Seminar Consultation with institutions and communities	<ul style="list-style-type: none"> • We would build internal and external capacity to do a more thorough job of responding to critical needs
CIJE CORE	Norms and Standards Policy Briefs Luncheon Seminars Publications Best Practices Planning for research capacity	<ul style="list-style-type: none"> • All of these projects (and others) would compete for limited resources under a rubric which would force us to carefully examine their applicability to real world problems

WHAT THIS PLAN IS DESIGNED TO ACCOMPLISH

- 
- The logo for the American Jewish Archives is a shield-shaped emblem. At the top center of the shield is a white Star of David. Below the star, the words "AMERICAN JEWISH" are written in a serif font, and "ARCHIVES" is written in a larger, bold serif font below that. The background of the shield features a faint, stylized menorah.
- **Develop a model for recruiting, training and placement of professional and lay leadership for Jewish education and a plan to roll out the model nationally**
 - **Begin to create models of excellence in Jewish educational institutions in the local infrastructure that supports them**
 - **Create high-quality consulting capacity for Jewish education that can assist in the transformation of Jewish educational institutions**
 - **Impact the ideas, perspectives, skills and priorities of at least 200 lay and professional leaders in North America**
 - **Do the above in a manner that will allow the results to be measured and used as a foundation for broad-based improvements in the system of Jewish education in North America**

NEXT STEPS

- 
- A large, light gray watermark of the American Jewish Archives logo is centered on the page. It features a shield with a Star of David at the top, the text "AMERICAN JEWISH ARCHIVES" in the middle, and a menorah at the bottom with Hebrew text "אגודת ישראל" and "אגודת אלה יעקב" on either side.
- **Develop estimated staffing plans and estimated budgets**
 - **Create fundraising strategy and governance structure**
 - **Work out more detailed timeline and sequencing of steps**
 - **Think through partnership strategy**
 - **Refine goals and objectives**
 - **Fold into 1998 work planning process**

CONFIDENTIAL - FINAL

MINUTES: CIJE STAFF TELECONFERENCE

DATE OF MEETING: May 1, 1997

DATE MINUTES ISSUED: May 2, 1997

PARTICIPANTS: Karen Barth, Gail Dorph, Alan Hoffmann (via telephone), Megan Ifill, Karen Jacobson, Nessa Rapoport

CC: Sarah Feinberg, Adam Gamoran, Ellen Goldring, Nellie Harris, Barry Holtz, Eli Holzer, Virginia Levi, Mort Mandel, Dan Pekarsky, Chava Werber

I. Review of Previous Minutes

The April 8 Minutes and Assignments were reviewed, corrected and accepted.

II. Evaluation Institute

KAB reported that the Evaluation Institute would be a joint venture with JESNA; CIJE would run the program and JESNA would recruit attendees. The first step would be to create an advisory committee of which Leora Isaacs would be a member. Barbara Neufeld will send out a proposed list of advisory board members. Barbara will send KAB a brief e-mail update every two weeks which KAB will send a copy to ADH, GZD, EG and AG.

III. MEF and TEI

GZD reported that she, BWH, EG, AG, Bill Robinson are working together to produce a 10-page document for each community which will include an executive summary and four to five points. Bill Robinson has baseline data and has done quantitative mapping work based on qualitative interviews and will make a "goals" list from this information.

There was a discussion that we should look for additional help to focus on the qualitative and writing work of the interview piece. It was suggested that we ask Anna Reichert, Susan Shevitz and Ken Zeichner for suggestions with an emphasis on Ken Zeichner as he may have a pool of graduate students that he could oversee on this work. NR offered to help work on the piece.

Assignment: GZD to call Ken Zeichner.

IV. Workplan

KAB led an extensive review and update of the Workplan with the staff.

Assignment: The revised version will be distributed later this month to the Steering Committee. A three-month update will be sent to staff, extended staff, consultants and lay people in a form different than minutes.

Assignment: GZD will call Bill Firestone re: Norms and Standards piece.

Assignment: ADH and GZD to have telecon re: Melton short term programs.

Assignment: GZD and BWH to discuss work on the Policy Brief.

NR suggested that the Luncheon Seminar should be more tied into our work and we should solicit people for specific papers. Best Practices materials will be included in the staff retreat agenda.

V. Professors

BWH and Art Green had a meeting, discussing Art's role as speaker/teacher at Professors in June.

Several professors were invited to join the professor group: Mike Millstein, Fran Jacobs, Dan Chazan, Richard Cohen, and Sam Meisels

Assignment: GZD will call Millstein to discuss future involvement as part of JEWEL.

VI. Staff meeting schedule

There will be a staff meeting on Thursday, May 8th, 3pm-5pm; Tuesday, May 20th, 10am-5pm and Wednesday, May 21st, 10am-2pm followed by a strategic planning meeting, 12pm-3:30pm.

Assignment: MI to send out meeting notice to staff.

VII. Staff learning schedule

We will determine the staff learning schedule at the next staff meeting.

Assignment: MI to type list of upcoming staff meetings and disseminate.

VIII. University of Judaism

KAB, GZD and DNP will meet with Dan Gordis and Bob Wexler on June 30th, 9am-4pm. MI is working on setting up a date for a planning meeting with KAB, ADH, GZD and DNP.

IX. Wexner

KAB reported that there was a meeting with all the sponsoring institutions and that the recruiting conference will be held in the Spring not the Fall.

X. JEWEL

KAB reported that there was a terrific meeting with Mike Millstein on April 25th at CIJE. GZD, KAB, EG, DE and Josh Elkin attended. Mike spoke about his work researching models of education. We are interested in having him write a piece on models of leadership education for JEWEL.

XI. PEJE: Partnership Excellence in Jewish Education

Josh Elkin and Naava Frank are planning to pilot process of three grants this year. GZD and KAB met with them and suggested that there be a two phase grant process: 1) give out planning grants whereby it can be determined if a project is worthwhile pursuing and 2) a project grant to complete worthy work.

XII. Early childhood

KAB and GZD attended a meeting at Tufts arranged by Fran Jacobs who is a member of the Professors Group. They met with the faculty of the education department and discussed models of early childhood education as they relate to Jewish education. There is a possibility we will work with Fran on a developmental model of early childhood education and examine what this model look like in a religious school.

XIII. Chairman's Council

There was a brief discussion as to what form the Chairman's Council would take. It was suggested that a series of smaller group meetings be held as it would provide a more intimate setting.

CONFIDENTIAL - FINAL

MINUTES: CIJE STAFF TELECONFERENCE

DATE OF MEETING: May 20, 1997

DATE MINUTES ISSUED: May 30, 1997

PARTICIPANTS: Karen Barth, Gail Dorph, Alan Hoffmann, Barry Holtz, Karen Jacobson, Dan Pekarsky, Nessa Rapoport

CC: Sarah Feinberg, Adam Gamoran, Ellen Goldring, Nellie Harris, Elie Holzer, Megan Ifill, Mort Mandel, Lester Pollack, Chava Werber

I. TEI Israel

The budget - The budget for Israel needs to be reviewed by KAB and ADH. KJ and GZD will be working on a system for developing this type of budget. It was agreed that in the future we need much more lead time so that budgeting can be done as part of the visioning and decision-making process.

The program - The topic is the high holidays -- the ideas of *teshuvah* (repentance) and *heshbon hanefesh* (self reflection). These ideas are important because the concept is central to education. Also, this is a way to be responsive to the need for both *Torah L'shema* and give them something practical. This year with the holidays falling in October, there will be an opportunity for those who attend, to work with their teachers in September on how to incorporate this into their practice. People are very excited about this topic and especially the confluence of Jewish ideas with the educational ideas.

Staff and consultants attending: Anna Richert, Deborah Ball, Sharon Feiman-Nemser, GZD, BWH, NH and EH (Elie Holzer)

II. Steering Committee Meeting - June 26 1997

Discussion reviewed earlier suggestions for this meeting including: strategic planning process, a visit from a professor and an update.

KAB talked about two versions of a request from both MLM and LP, that a one page description of CIJE be created for use. (see item #16)

Taking these two as a starting point, the following agenda was created:

9:30 - 10:00	Introductions
10:00 - 12:15	Strategic Plan (with break)
12:15 - 1:00	Lunch
1:00 - 2:00	One-page CIJE description and Steering Committee communication
2:00 - 2:15	Break
2:15 - 3:15	Updates (including Fran Jacobs reporting on consultation at Tufts and its implications for Early Childhood Strategy)

KJ asked that all materials need to be in her hands by the end of next week for mailing June 2nd. Three items are to be included: publications update, Workplan update and Strategic Planning materials.

III. Best Practices Dissemination

BWH circulated a document and introduced two questions:

- 1) What do we mean by dissemination of Best Practices?
- 2) To whom should they go?

Originally Best Practices volumes were not intended for mass distribution, but were available to lead communities, or within the context of CIJE led educational sessions. In recent years we have redone volumes in an attractive way. We now have two reasons for distribution:

- (a) Public Relations -- name recognition for CIJE
- b) Help improve the field of Jewish education

A discussion ensued around the question of whether "dissemination" should

be seen merely as a database issue -- send Best Practices out to a wide number of recipients; or whether Best Practices becomes the text of a curriculum in which the Best Practices is used as part of a wider program.

The general feeling is that our strategy should be oriented toward targets of opportunity with high potential to actually use the ideas in these publications.

Ruth Pinkenson Feldman should be invited to devise a strategy for using the Early Childhood Best Practices within the Center world. It was pointed out that a combination of Biennial, Harvard Principals Programs, JEWEL activities, etc. would over the next two years, need close to 2,000 copies of each of the Best Practices

Assignment:

BWH to call Ruth Pinkenson Feldman re: strategy for using the Early Childhood Best Practices.

We will also talk to David Behrman of Behrman House for some advice on dissemination. Also Best Practices fits in JEWEL as a text for teaching and also possibly, as a vehicle for training a special group of facilitators who would run Best Practices sessions.

Assignment:

BWH to call David Behrman.

All commented on how much the notion of "Best Practices" have taken root in the parlance of Jewish education.

IV. Teachers Report

The Teachers Report -- will be the full-scale report of the data on teachers in Jewish schools from the CIJE Study of Educators. NR continues to receive requests for the full report; the CIJE Policy Brief is an excerpt of the findings and policy implication on the background and training of teachers.

V. Educational Leaders Report

We have not really defined who the audience is. One view is that we should have a document that is analytically strong and accessible to lay leaders. Another view is to just get the data out there! Various concerns were expressed, including: 1) unclarity re: audience, 2) unclarity re: our bottom-line views re: leadership; 3) why publish the article at all? It was stressed that people want information -- there have been many requests! The suggestion was made that data be accompanied by an "issues raised" section -- but this may already be in the document. Issue was tabled. We will

discuss this after everyone rereads the document -- for the June 4th meeting.

We may need to think about publishing more technical documents in a series and also trying to translate that data in ways that are accessible to many people. We need to think from the outset about the nature of publications and particularly what their audience should be. And also who the writers need to be for such documents.

We need to think much more about this document.

Assignment:

KAB to discuss with EG and AG.

VI. Edgar Bronfman's New Projects

NR received a call from Bill Friedman of Edgar Bronfman's foundation re: a new project which would bring Jewish Studies to private schools in New York -- a pilot project to bringing them to public schools. They are looking for suggestions of people to make it happen. They need someone with private school experience who can work with school leadership.

KAB reported that she had a meeting with Richard Joel and there is a second, broader program that is conceived of as "Hillel brought into the high school age group" Avi Weinstein would develop the curriculum.

NR reported that she was invited to Edgar Bronfman's headquarters to meet and discuss this further. She will report back after the meeting.

VII. Staff Meeting

On June 4th we will discuss the 1998 calendar.

Assignment:

KAB to get the Steering Committee dates.

Assignment:

All Staff to think through plans re: calendar preparation for June 4th meeting.

VIII. Elie Holzer

Elie Holzer will be based in Boston and will work for CIJE two days per week as a consultant.

As part of CIJE orientation for new staff members including Elie, it was

suggested that they attend TEI and also work on some consultant projects.

IX. Office Policy

KJ reported that there are two new request forms that need to be filled out prior to the purchase of materials: one for smaller items and one for larger purchases. There is a short form for staff to fill out which gets turned over to support staff. They will then fill in a larger form.

Time allocation sheets need to be filled in.

Assignment: KAB will write up a senior staff policy with regard to the acceptance of outside compensation.

X. Professors

About twenty people (including staff) will attend. We have retained the old group and added new people. Art Green will teach five sessions, the main theme being Hasidism as an interpretive tradition. He will discuss the potential and limitations of using Hasidism as a model for religious life in our own times. He will focus on Hasidic view of leadership and teaching. BWH to send out details and readings next week.

Assignment:

There will be a place to discuss the Strategic Plan and other CIJE matters. There are also some new people who cannot come this time but want to be considered members of the group or potential members.

XI. One Page Description of What We Do

LP said that he needs a one page document describing the work of CIJE. MLM asked if the page could be a paragraph. At tomorrow's Strategic Planning meeting we will attempt to write such a document and then bring it to the Steering Committee for review and analysis.

In addition to the request for MLM and LP for a document which describes what CIJE does, John Colman has asked if we could create a monthly update about CIJE's work for Steering Committee members.

XII. Strategic Planning Process

We decided to include the following four topics in tomorrow's meeting:

CFWW, JEWEL, Core and one page document.

XIII. CAPE

KAB met with Annette Hochstein when she was in Israel last week. They talked about strengthening the relationship between CAPE and CIJE which could include allocating a support staff person (20%), more collaboration in recruiting efforts, tying into JEWEL and cooperating in the relationship between JEWEL and CAPE.

XIV. Evaluation Institute

Assignment: Barbara Neufeld has signed a contract with CIJE.
KAB will email Barbara Neufeld and ask her to email staff on ideas for Advisory Board names.

XV. Partnership in Excellence in Jewish Education (PEJE)

Josh Elkin and Naava Frank meeting --

Assignment: KAB to call Josh Elkin to discuss next steps to formalize relationship and see if CIJE could be helpful in their strategic plan.

XVI. HUC

KAB gave a brief update on her trip to the Jerusalem campus of HUC. There are four issues:

- 1) Rethinking the first year program for U.S. Rabbis, Cantors and Educators
- 2) The role of the campus in training Israeli Rabbis
- 3) The role of the campus in supporting the Reform Movement in Israel

4) Managing the leadership transition

The potential of this project appears to be quite significant both in terms of impact on Israel and on Rabbinic training in the U.S.



CONFIDENTIAL - FINAL

MINUTES: CIJE STAFF TELECONFERENCE

DATE OF MEETING: June 4, 1997

DATE MINUTES ISSUED: June 16, 1997

PARTICIPANTS: Karen Barth, Gail Dorph, Alan Hoffmann (via telephone), Barry Holtz, Megan Ifill (secy.), Karen Jacobson, Nessa Rapoport

CC: Sarah Feinberg, Adam Gamoran, Ellen Goldring, Nellie Harris, Elie Holzer, Mort Mandel, Dan Pekarsky, Chava Werber

I. Staff Learning

BWH lead the staff learning session.

II. Review of Previous Minutes

The May 20th Assignments were reviewed, corrected and accepted. The minutes will be reviewed at the next staff meeting.

III. 1998 Meeting Dates

It was agreed that Steering Committee meetings and Staff Retreats should be scheduled for the same week so that all staff can be present for both meetings and it would also reduce travel costs.

IV. Professors Seminar

BWH reported that there will be five programmatic sessions at professors: _____
Judaic Content - Art Green
Overview and Discussion of Strategic Plan – Ellen Goldring
Change Lab, CFWW - Karen Barth
Early Childhood Education - Fran Jacobs

Shabbat – Nessa Rapaport
JEWEL - Ellen Goldring

Some new professors to the group are: David Purpel, Wally Feinberg, Barbara Schneider and Debbie Kuderman.

V. Brandeis

Brandeis has proposed a program which represents an investment in substantive programs for youth and would require some significant involvement from us. KAB noted that this could be part of the Change Lab in the Strategic Plan.

VI. Synagogue 2000

KAB reported on the meeting she attended.



CONFIDENTIAL - FINAL

MINUTES: CIJE STAFF TELECONFERENCE

DATE OF MEETING: June 23, 1997

DATE MINUTES ISSUED: July 2, 1997

PARTICIPANTS: Karen Barth, Gail Dorph, Alan Hoffmann (via telephone), Barry Holtz, Megan Ifill (secy.), Karen Jacobson, Nessa Rapoport

CC: Sarah Feinberg, Adam Gamoran, Ellen Goldring, Nellie Harris, Elie Holzer, Mort Mandel, Dan Pekarsky, Lester Pollack, Chava Werber

I. Staff Learning

NR lead the staff learning session with a reading from the introduction to *The Cloister Walk* by Kathleen Norris. the book depicts Norris' association, as a lay person, with a Benedictine monastery and describes the central role of sacred texts in spiritual life.

II. Review of Previous Minutes

The May 20th Minutes and Assignments were reviewed, corrected and accepted. The June 4th Minutes and Assignments will be reviewed at the next staff meeting.

III. Update on MLM/LP meeting June 22nd

KAB and ADH gave a brief update on their meeting with MLM and LP which centered on the Strategic Plan. It was discussed that we needed to work on the language of the plan. It was decided to change "Change Lab" to "Field Sites."

IV. June 26th Steering Committee Meeting

A full copy of the minutes will be in the Steering Committee book and a summary of the minutes will be read at the meeting.

The following updates will be given: TEI - GZD; University of Judaism and HUC - KAB; Professors - BWH; *Shearim* - ADH

V. Fairmont Temple

KAB spoke with Mark Gervis who reported that the Assistant Rabbi has recently become the Senior Rabbi. The Temple initially was in need of an Educator, now additionally needs an Assistant Rabbi. They are asking for our help to develop ideas on how to revitalize their program.

Assignment: GZD to call Vicky Kelman to see if she is available for this project or knows of a suitable alternative.

Assignment: BWH to call Alvin Kaunfer to see if he is available for this project.

VI. General Assembly (GA)

NR reported that she has not yet received any information from CJF on planning sessions on Jewish education at the 1997 GA.

VII. University of Judaism

KAB reported that Sharon Feiman Nemser would be attending the consultation and Israel Sheffler would join in by telephone from 9:30-11:30am.

VIII. Office

KJ reiterated that we have a "clean-desk" policy and that at the end of each day, everyone's desks should be neat and organized.

KJ reported that there is a 4% increase in the Oxford health insurance premium which will be reflected in the next payroll. Also, we now have Chiropractic care coverage and a small reimbursement for fitness clubs.

STAFF RETREAT AGENDA

1. Workplan - What is in, what is out
 - 3 year plan
 - 1 year plan
 - Responsibilities and workload
2. Evaluation/feedback
3. Staffing
 - Structure
 - Hiring
 - Training
4. Communication/codification
5. Guiding Principles
6. Calendar



CLSF: staff Retreat - June 23-24 1997



CFWW - Cons. Itm. Firm w/o walls (2)

- to build capacity

- Cons. Itants can then work in Field Sites

- can take on internal projects

Field Sites

- primary purpose is demonstration

- lots of instits - w/in a community

- start w/ the instits

- communal is paid, but not yet there

- to accomp

- grow CIFA

- Partnerships

examples of possible sites ⁽³⁾

YOUTH - Brandeis
early childhood - TCFs

Synagogues - FCE, Syn 2000
- heavy CITE (combined JPH/anthr)

Day schools - Partnership for Israel in JEd
- lite CITE

Camps

JCC

Adult Ed

Outside instts - retreats, internet, etc.

20 yr strategy

- take a cohort approach - start ec?
 - vs opportunistic approach
- if no good partner, may not direct w/ fied

rationale for this approach (4)

- s/s xemic change
 - tipping point
 - can evaluate what really care about
- will this overwhelm us?
- ^{CRS}
~~paper w/ synch process~~
 s-s can be done

a practical stereo-field sketch

	1980	1999	2000
early childhood	thinking, planning, describing	1-3 sites	continue
Synagogues	1/2 pre thinking 1/2 launch		→
building the profession	so have a [unclear] a FEI team 1-2 common		→
lay leadership (federation)	think, teach (M.W.)		→
youth, day schools, JCCS — consultative role — Brandeis, FEI & SCCA		in JEWEL, not fed's ter	
		In FWW	

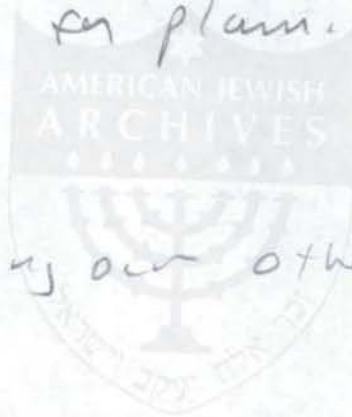
JEWEL - reasons for p.lots ⑤

seeding the culture

jump-starting the work
increase basic capacity

learning for planning

supporting our other work



pilot projects

6

principals for
community day ks

sr educators
2-yr pt

lay leadership
mixed 2-3 communities

10-15 new people
(FAB)

early childhood

Rabbis

Eval Inst. +

Professors

TEI

Goals Consultant
Seminar

Customized prog
for sr sr leaders



pre-service mcs
for principals
(S-PPL/day)

faculty of higher
lgs in T edc

faculty of Judaica
- teach abt edc

retool Judaica
students as T edc

Conference on
Rabbinic Edc

biennial

institutional
+ profess. mal

day s. hl pnn rnm
nm-T s-hls

day s. hl pms
for PETE

Funders/Funders
moj

community edc planners



Conference/trng prg
for CFWR

conference on change
communal lay/professionals

S-1/pt our work	Incr basic capac	learn not for planning
professors sem goals consultant sem CFWR sem early childhd lay/prof syn lay/prof - rabbis educ	pl. n. p. als + pre-semin + in service syn sing Eval Inst. t TEI	communal lay proj funders sem biennial
rabb. n. c. ed prg	senior-senior	

What are the Core projects? ⁽⁹⁾

Indicators

Policy Papers "Research for Policy"

Policy Briefs

Research Papers

Evaluation of CITE Initiatives

Research, Devel, & Support

Themes	Activities
Building the Prot	Ongoing seminar
Our vision and work Pluralism spirituality leadership centrality of lay	Ongoing seminar
Early Childhood	White Paper Field Site Plan
Synagogue Change	Thinking Behind Syn Proj Research, Planning
JEWEL Planning Goals ^{Kitchen} Project	Research - planning
Rabbinic Educ	Think tank - Bel Bel?
Lay leadership & b	
Planning Eval Proj	
Indicators	
Harmon	

Themes	Activities 11
Publications	Hartman Journal Change in Tension Case study in U.S. in - a series called "Vision at the Heart" - curriculumize for JEWEL What have we learned Examine what is needed
Best Practices	
Communications	new vehicles
Board seminar	Planning (2 lectures/yr)
Luncheon Seminar	Seminars
Research (applied)	Paper
New CITF Research	e.g. study of informal educators
interactions w/ stakeholders	
Advisory Committee	
- Scan a work	

Cons. Hing projects

(12)

movements - TEI strategies

Torah Umesorah

UT

HVC

(Brandeis - will move to field site)

Communities - on BTD
- on evaluation

PEJE

Melton Adult Min. Schools

What is Missing

13

Technology / Library

Grant writing

MITGask

Board

Werner (am France

Syn 2000



Evaluation

(14)

In-house evaluator of
CITF

- every piece of work will have an eval
- would rpt to eval comm of board, not to Karen

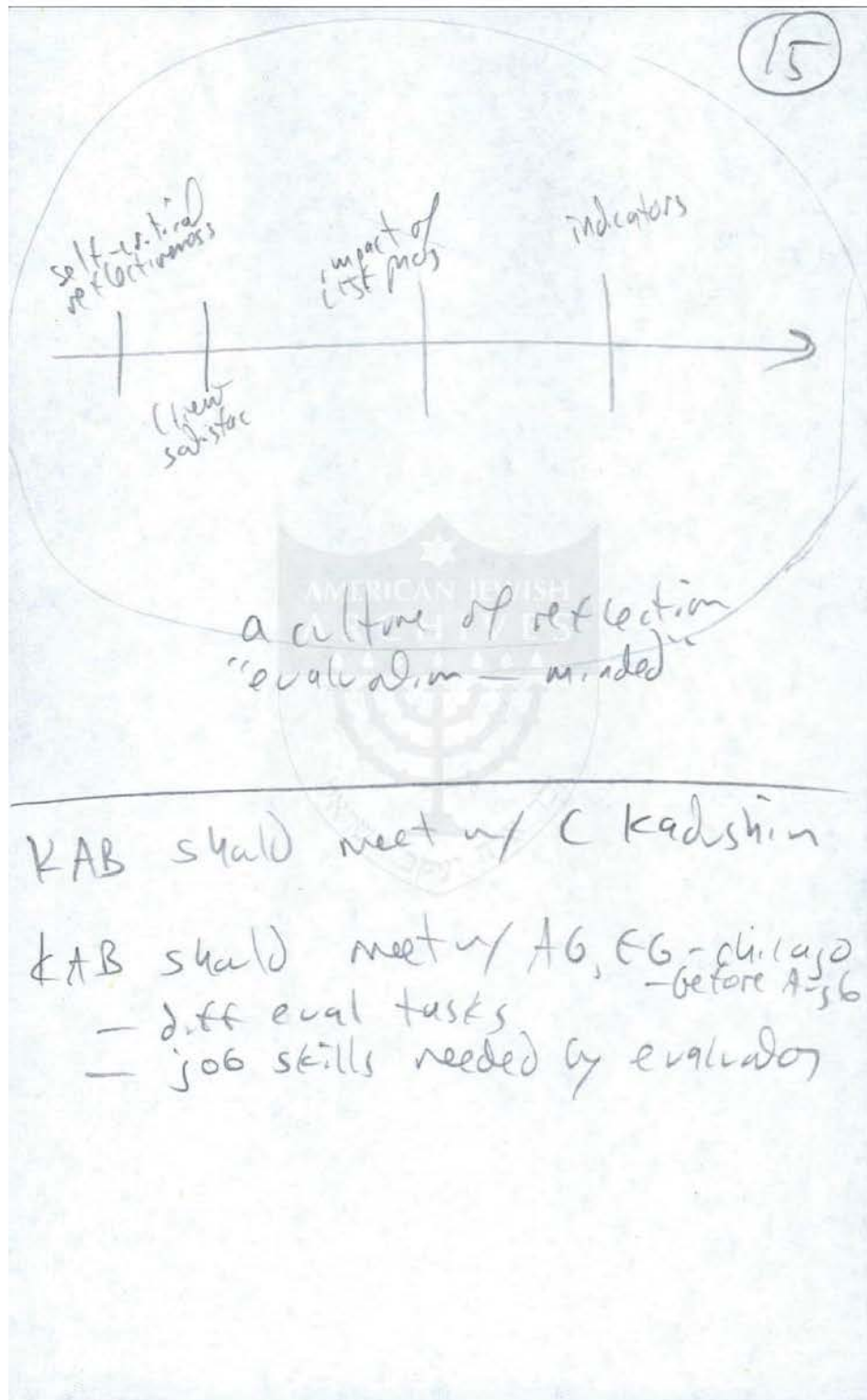
Purposes

- ongoing impact of the proj
- a ltr organized
- to help prog leaders reflect
- design & execute summative eval

ADH - internal feedback mech
- so as far as partic percps

62d - when creating new knowledge,
need a diff model

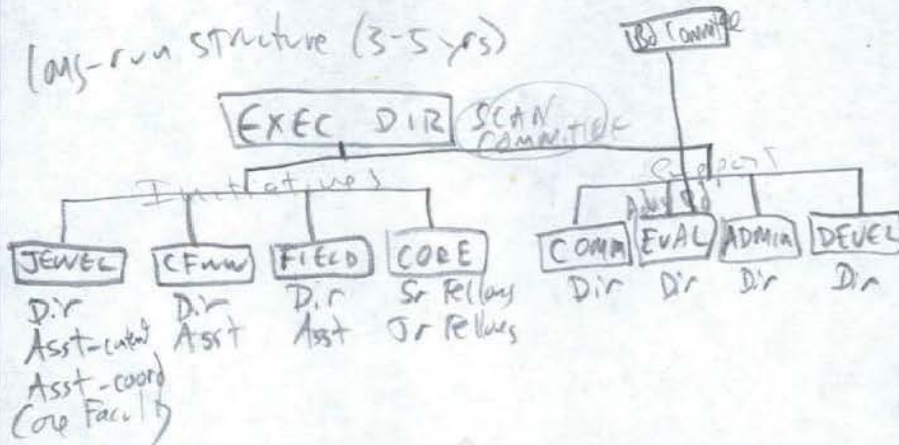
(15)



team-based org
- project teams - each w/ team leader

16

long-run structure (3-5 yrs)



1998



EG will coord planning for JEWEL,
even at the expense of R+E

Next steps

17

1 Refine project lists

2 Develop teams

3 Budget

4 Finalize Calendar

5 Refine Orgz plan

6 Last items from agenda of 6/24-25

FIELD - KAB, GZD
CFFW - KAB
CORE - But, DP, NR
COMM - NJ
ADMIN - KJ
EVAL - EG/AG - meet in Chicago
TEWL - EG/GZD/ADH

(KJ, Bob Dietz)

At A-s retreat

At A-s retreat

At A-s retreat

Need draft of work plan,
w/teams + budget, by Aug

Agenda for Staff Retreat
June 24 - 25, 1997

1. The insides of the four initiatives -- 3-year plan and 1998 plan

Field sites

- ~~Change Lab~~ -- What projects? What locations?
- JEWEL -- What is the planning process? What pilots?
- CFWW -- What activities to build the network? What projects/clients?
- Core -- What themes for proactive projects? What projects to support the other initiatives? What publications? What about a Journal?
- Evaluation

2. How to make this plan work:

- Organizational Structure
- Staffing
- Communication and integration
- Operating Principles/Culture
- Training - Current and New People

3. Communicating to the outside world

Preparation

- | | | |
|----|---------------------------------|-------|
| 1. | List of projects for 1998 | (ALL) |
| 2. | Staffing ideas - people/sources | (ALL) |
| 3. | Communication proposal | (KAB) |
| 4. | Operating principals - Mckinsey | (KAB) |

* = Team Leader
 o = Team Member
 - = Team Informant

	K A B	G Z D	A D H	N R	B W H	D N P	E G	A G	E H	N H	S S	P C H	K J	L M	B R	B N
Field site planning	-	*							o?		o					
Board	*	-	-	o									o			
Chairman's Council	*		-	o									o			
External communication	-			*									-			
Internal communication	-			*									o			
CFWW planning	*												-			
JEWEL planning	o	o	-				*					*				
JEWEL pilot planning		o					*					*				
Oppenheim	*												-			
Biennial	o	-	-	o			-					*	-			
Evaluation																
TEI							*	*							o	
Scan Committee																
Infrastructure												*				
Evaluation institute planning							-	-			-				-	*
Professional development consultations		*														
TuM	-	o							o							
Shearim		*				-			o	o		-				
Wisconsin		*				o		-								
Machon L'Morim		*								o		-				
Melton Atlanta		*								o						
FMAMS		*									o					

	K A B	G Z D	A D H	N R	B W H	D N P	E G	A G	E H	N H	S S	P C H	K J	L M	O P P	B R
* = Team Leader																
o = Team Member																
- = Team Informant																
Synagogue Research	*					o		-						*		
Consultation to rabbinical programs	*	-				o										
Conference on rabbinic education	*	-							o			*				
TEI		*	-					-	o	o		o				
Early childhood white paper		*	-	-				-								-
Consultation to Brandeis	*		-													
Consultation to PEJE	o	*					-		o			o				
Consultation to JCCA	*		-						o			o				
Leadership Think Tank	o	-		o		o/-	*	-	o			*				
BTP research/planning	o	*	-				-	-						*		
TEI consultation follow-up		*								*		o		*		
Lay leader pilot	-			*		*	-					o		o		
Funders network	*			o								o				
Recruiting conference	-														*	
Community day high school							*	-		o						
Leading indicators	-						*	*								o
Research capacity paper								*								-
Goals study group	-			o		*			o							
Vision cases				*		*			-							
1 to 5				o		*			o							

* = Team Leader
 o = Team Member
 - = Team Informant

	K A B	G Z D	A D H	N R	B W H	D N P	E G	A G	E H	N H	S S	P C H	K J	L M	O P	B R
Luncheon seminar				*									-			
CORE planning	*	-		o		o		-								
CFWW start-up	*												*			
Professors		o			*							o				
Staff development		*		-									o			
Cost of Jewish Education	*						o	o								



August 3, 1997

To: Karen Barth

From: Adam Gamoran

Re: Draft Work Plan and Budget

Ellen and I have had a chance to look over and discuss the draft workplan and budget for 1998, and we are looking forward to the upcoming conversations at the staff meetings this week. In preparation for the meetings, we wanted to let you know about two concerns that hit us right away:

(1) There is no staff researcher listed, in either the budget or the organizational chart. This person, whether it is Bill Robinson or someone else, is essential for our work. We need someone to manage and analyze data, provide materials for consultations, conduct interviews, write reports for us, make contacts, attend meetings, and so on. All of our work to date has drawn heavily on the contributions of our staff researchers, and this "legwork" function is still necessary.

(2) Although an asterisk indicates that Ellen will have some involvement in Evaluation and Research, she would like to continue her leadership role in this area, and she would like the organizational chart to reflect that commitment.

Thanks in advance for taking these response into account -- see you Tuesday.

CIJE 3-YEAR WORKPLAN

1998-2000

AMERICAN JEWISH
ARCHIVES
DRAFT



Staff Retreat

August 5 and 6, 1997

SELECTING INSTITUTIONAL PRIORITIES FOR FIRST 3 YEARS

Arena	EASE			NEED			TOTALS		
	Builds on CIJE Expertise	Availability of Partner	Models/Ideas more developed	Importance or potential in building identity	Currently poor quality	Large numbers of people involved	EASE	NEED	TOTAL
Day Schools	4	5	4	5	3	2	13	10	23
Synagogues	5	3	2	4	5	5	10	14	24
JCCs	3	5	3	4	4	4	11	12	23
Early Childhood	4	5	2	4	5	5	11	14	25
Youth	3	5	2	5	5	3	10	13	23
Camps	3	2	5	5	4	2	10	11	21
Adult Educ. (<20)	1	1	3	4	5	2	5	12	17
Adult Educ. (35-65)	1	1	4	4	3	5	6	12	18
Seniors	1	1	1	1	5	1	3	7	10
Retreats	3	3	3	3	3	1	9	7	16
University	1	1	4	5	2	5	6	12	18
Internet	1	3	2	3	3	1	7	7	14

STRATEGIC THEMES - 3 YEAR WORKPLAN

	JEWEL	CORE	CFWW	FIELD SITES
INSTITUTIONS	Goals seminar ?	Change in institutions		
• Synagogues	TEI Conference on rabbinic education	Synagogue change research Supplementary school think tank Synagogue policy brief Early childhood think tank	Consulting to rabbinical schools	Synagogue change program
• Early childhood	Early childhood TEI ②	Early childhood policy brief <i>white paper</i>		Early childhood pilot ②
• Youth programs			Consulting to Brandeis <i>think tank pol. brief</i>	Brandeis pilot
• Day schools		Day school policy brief ? <i>Best Practices?</i>	Consulting to PEJE	
• JCC's			Consulting to JCCA	JCCA pilot
LEADERSHIP		Models of leadership		
• Lay	Biennial Milwaukee Funders Evaluation institute Junior lay leaders X	Lay leadership research X Lay leadership think tank		
• Professional	TEI Recruiting conference Conference on rabbinic education Oppenheimer project Senior/senior "KAB's" X Principals Conference on training educators BJE/continuity directors <i>ALOHAN?</i>	BTP think tank Rabbinic education policy brief	Consulting to professional development programs	
• Joint	Lay/professional new day schools X Lay/professional synagogues			
POWERFUL IDEAS		Journal		
• Evaluation	Evaluation institute	Leading indicators	<i>consulting to communities</i>	Leading indicators pilot
• Change in institutions		<i>Guiding ideas</i> Goals study group Change in institutions <i>led by JCCs</i>		
• Pluralism in education		<i>models of leadership</i> Pluralism in education <i>Judaism</i>		

• Research

Research capacity issues

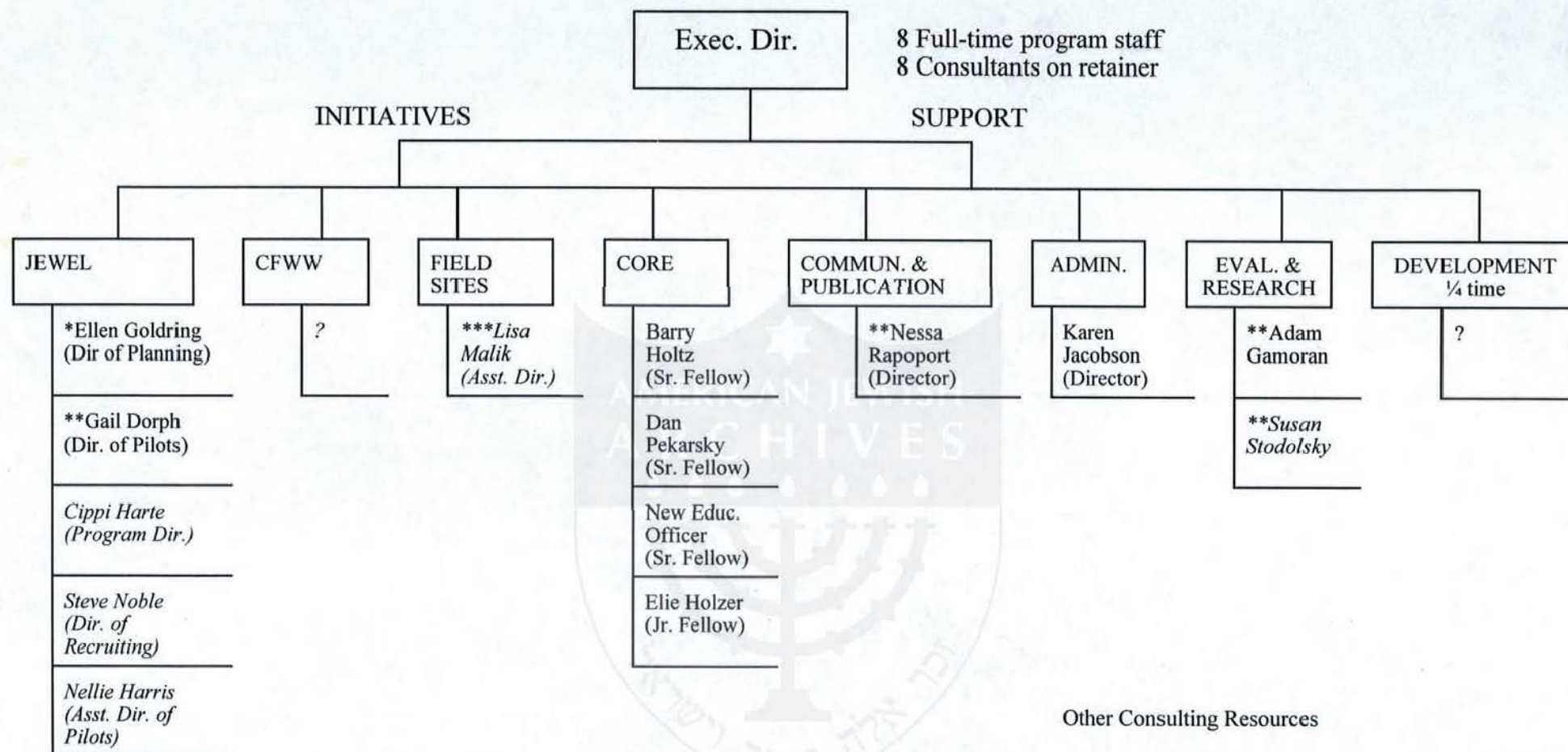
infrastructure, capacity bldg, planning docs not on this list

3 YEAR TIMELINE	1998	1999 (tentative)	2000 (tentative)
JEWEL	Planning - philosophy and business plan Pilots: <ul style="list-style-type: none"> • Evaluation institute • TEI • Goals seminar • Professors • Funders • Lay/professional new day schools • Biennial planning conference on rabbinic education • Lay leaders (Milwaukee) Recruiting: <ul style="list-style-type: none"> • Recruiting conference • Oppenheimer project 	Planning - implementation plan, recruiting and fundraising Pilots: <ul style="list-style-type: none"> • Synagogue lay/professional • Senior/senior • Principals • BJE/continuity leaders • Conference on training of educators • Biennial 	JEWEL launch <ul style="list-style-type: none"> • KAB's • Junior lay leaders • Early childhood TEI
CFWW	Recruiting _____ First conference _____ Ongoing projects _____	_____ Second conference _____ _____ Training classes _____	_____ Third conference _____ _____ _____
CORE I	Leading indicators _____ BTP think tank _____ Change in institutions _____ Models of leadership _____ Goals group _____ Supplementary school think tank _____ Journal _____	_____ _____ Early childhood policy brief _____ Pluralism in education _____ Rabbinic education policy brief _____ Lay leader think tank _____ _____ Lay leader research _____	_____ _____ Synagogue policy brief _____ Day school policy brief _____ Spirituality and education _____ _____
Field Sites	Synagogue change research _____ Early childhood white paper _____ Brandeis think tank _____	Start synagogue change project _____ Start early childhood pilot _____ Brandeis youth project _____ JCCA planning _____	_____ _____ _____ Leading indicators pilot _____ JCC site _____
CORE II	Steering committee _____ New staff orientation _____ Chairman's council _____	_____ _____ _____	_____ _____ _____

STRATEGIC THEMES - 1 YEAR WORKPLAN

	JEWEL	CORE	CFWW	FIELD SITES
INSTITUTIONS	Goals seminar	Change in institutions		
• Synagogues	TEI Conference on rabbinic education	Synagogue change research Supplementary school think tank Synagogue policy brief Early childhood think tank	Consulting to rabbinical schools	
• Early childhood				
• Youth programs			Consulting to Brandeis	
• Day schools			Consulting to PEJE	
• JCC's			Consulting to JCCA	
LEADERSHIP		Models of leadership		
• Lay	Milwaukee Funders Evaluation institute Junior lay leaders			
• Professional	TEI Recruiting conference Conference on rabbinic education Oppenheimer project "KAB's"	BTP think tank	Consulting to professional development programs	
• Joint	Lay/professional new day schools			
POWERFUL IDEAS		Journal		
• Evaluation	Evaluation institute	Leading indicators		
• Change in institutions		Goals study group Change in institutions		
• Pluralism in education				

SHORT TERM - ORGANIZATIONAL STRUCTURE



Other Consulting Resources

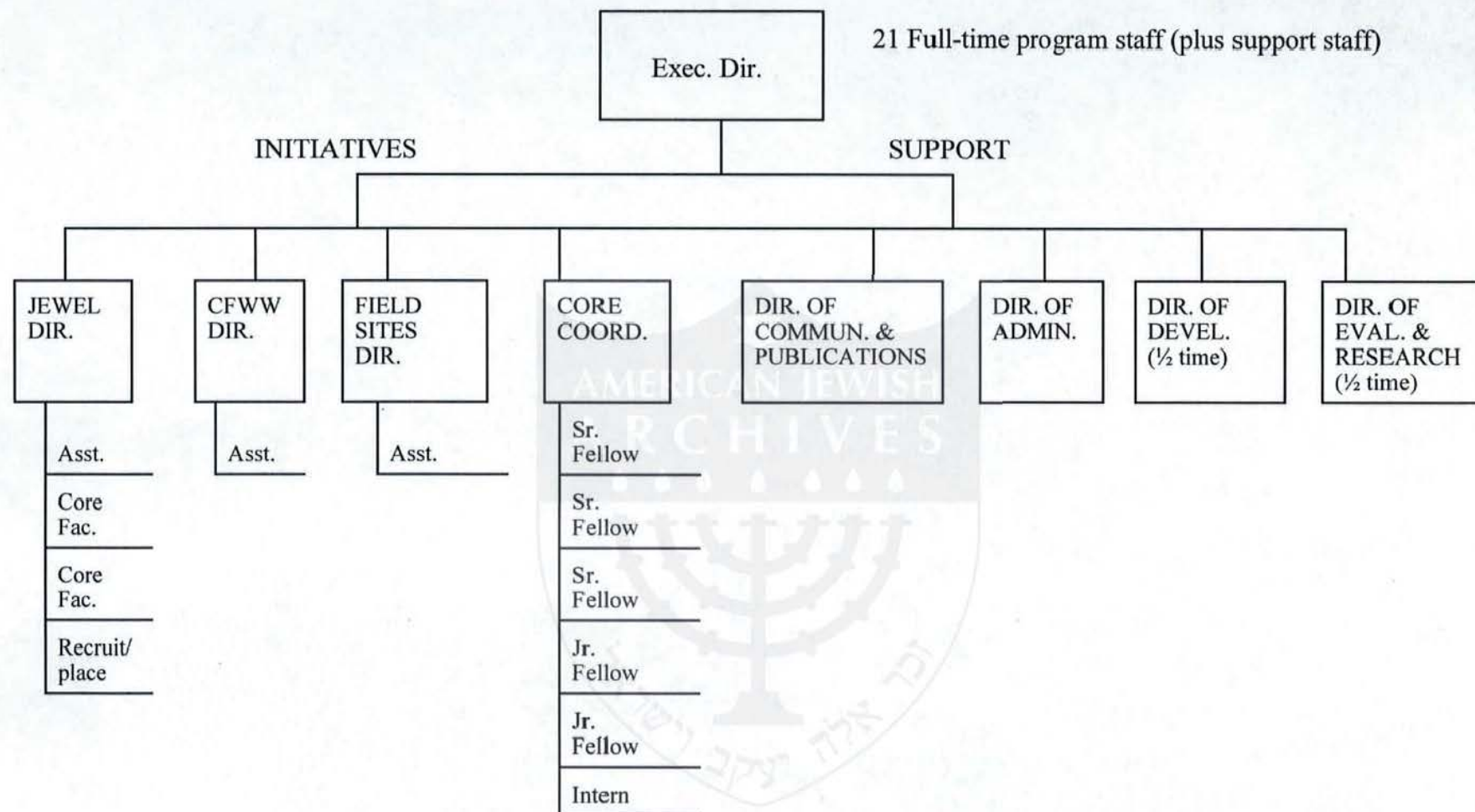
- Sharon Feiman-Nemser
- Michael Paley
- Deborah Ball
- Michael Rosenak
- Fran Jacobs

*Also a Senior Fellow and in Eval. & Research

**Also a Senior Fellow in CORE

***Also a Junior Fellow in CORE

LONG TERM - DRAFT ORGANIZATIONAL STRUCTURE



CIJE WORKPLAN



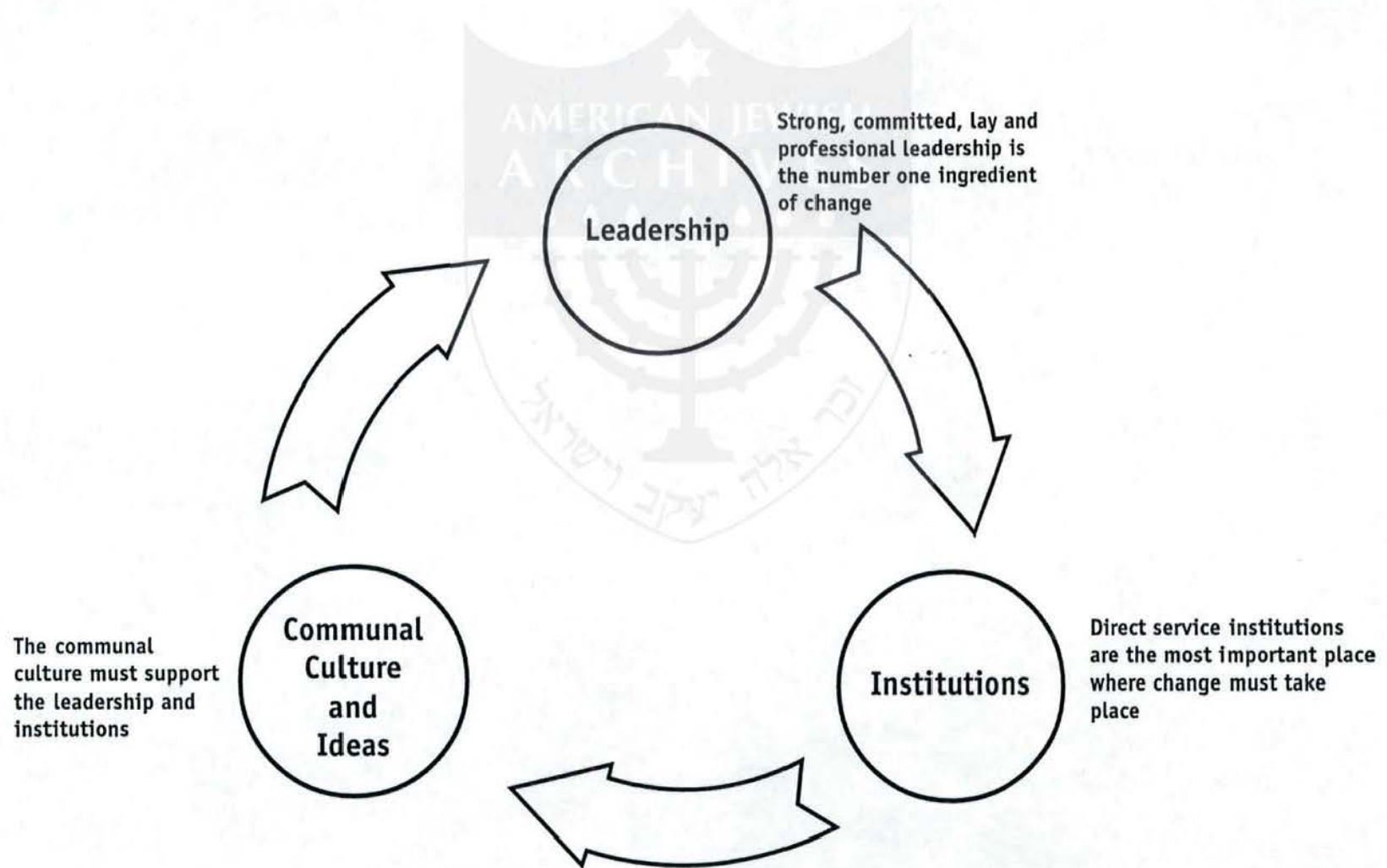
Steering Committee

August 7, 1997

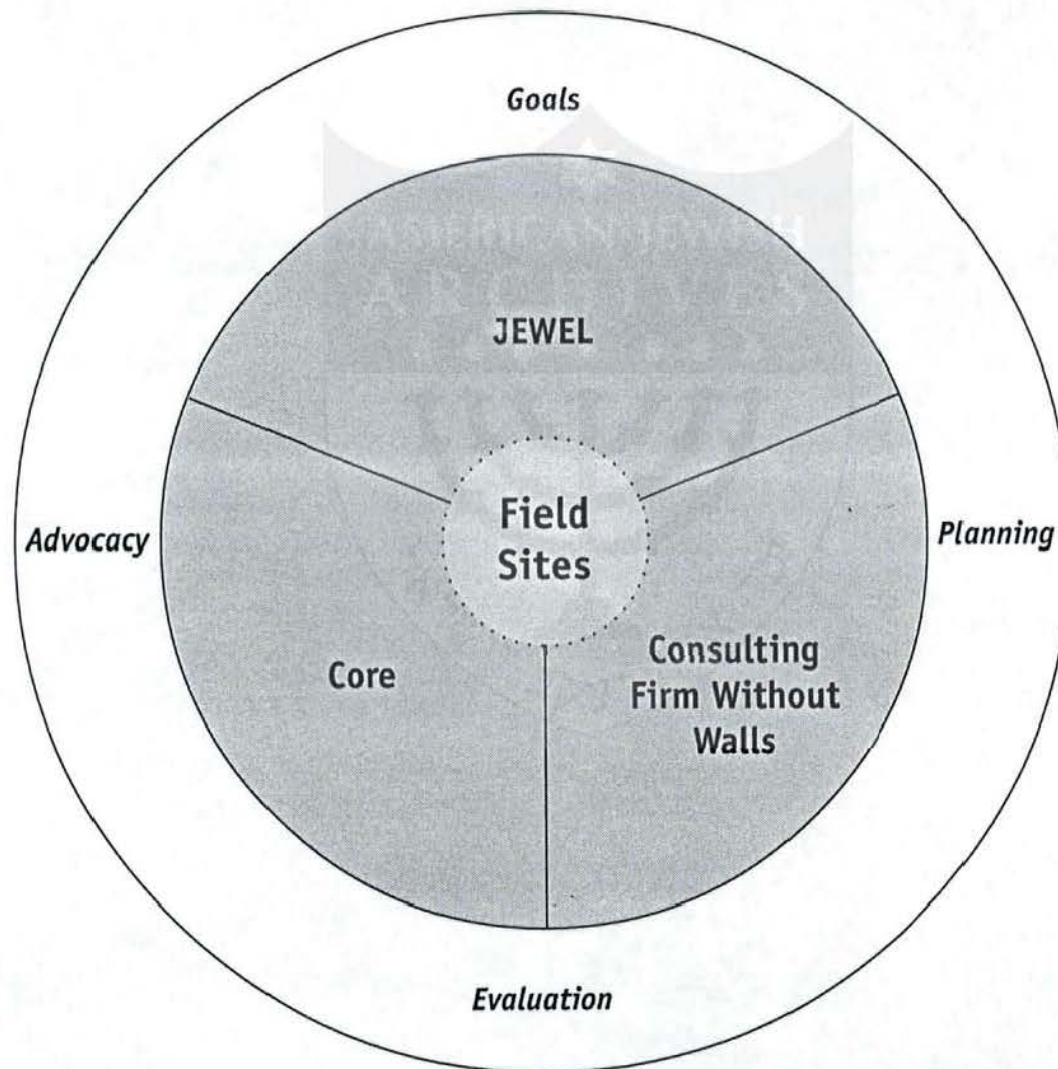
WORKPLAN SCHEDULE

	June	July	August	September	October
Complete strategic plan	X				
Staff retreat		X	X		
First Steering Committee meeting on workplan			X		
Individual meetings with Steering Committee members				X — X	
Workplan revisions and budgeting				X — X	
Final budget proposal discussed at Steering Committee					X

CIJE CHANGE PHILOSOPHY: A SYSTEMS MODEL



STRATEGIC INITIATIVES



SELECTING INSTITUTIONAL PRIORITIES FOR FIRST 3 YEARS

Arena	EASE			NEED			TOTALS		
	Builds on CIJE Expertise	Availability of Partner	Models/Ideas more developed	Importance or potential in building identity	Currently poor quality	Large numbers of people involved	EASE	NEED	TOTAL
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Retreats	3	3	3	3	3	1	9	7	16
University	1	1	4	5	2	5	6	12	18
Internet	1	3	2	3	3	1	7	7	14

STRATEGIC “GAME BOARD”

	CORE	CFWW	JEWEL	FIELD SITES
INSTITUTIONS				
LEADERSHIP				
POWERFUL IDEAS				
INFRASTRUCTURE				

3-YEAR OBJECTIVES/STRATEGIC OVERVIEW

14 Strategic Themes	3-Year Objective
INSTITUTIONS <ul style="list-style-type: none"> • Synagogues • Early childhood • Youth program • Day schools • JCCs 	<p>Develop a vision of a model synagogue that is a flourishing center of Jewish learning for children and adults; help six to eight synagogues to move toward that vision</p> <p>Develop a vision of a model early childhood program; help two to three early childhood programs to move toward that vision</p> <p>Help Brandeis to develop and begin to implement a strategy for creating vibrant programs for Jewish adolescents</p> <p>Help PEJE to develop a strategy for creating quality day schools</p> <p>Help JCCA to develop a strategy for supporting quality Jewish education at JCCs</p>
LEADERSHIP	Create a comprehensive plan for a leadership development system for Jewish education and begin to pilot parts of the program
POWERFUL IDEAS <ul style="list-style-type: none"> • Leading indicators • Research capacity for Jewish education • Change in institutions • Pluralism in education 	<p>Create and pilot a methodology for evaluating progress in efforts to revitalize Jewish life through education</p> <p>Develop and disseminate a point-of-view on what needs to be done to build research capacity for Jewish education</p> <p>Push forward our understanding of how institutions change as a basis for all of our change work</p> <p>Develop a rich set of ideas on education in pluralistic settings to undergird all of our work</p>
INFRASTRUCTURE <ul style="list-style-type: none"> • Capacity • Evaluation • CIJE Board and lay leader development • Communication/codification 	<p>Develop CFWW consulting capacity to 25-30 active consultants</p> <p>Build evaluation into every project we do</p> <p>Create an active, engaged Board of 15-18 and a Chairman's Council of 25-30</p> <p>Build a system to codify our work and make our learning easily accessible to people outside CIJE</p>

3-YEAR WORKPLAN FOR INSTITUTIONS

	CORE	CFWW	JEWEL	FIELD SITES
Early childhood	Early childhood white paper		Early childhood leadership training	Early childhood pilot
Synagogues	Synagogue research and think tank Synagogue policy brief	Consulting to rabbinic programs	Conference on rabbinic education Conference on training educators Lay/professional synagogue leadership training	Synagogue pilot
Youth programs		Consulting to Brandeis		
Day schools		Consulting to PEJE		
JCCs		Consulting to JCCA		

3-YEAR WORKPLAN FOR LEADERSHIP

	CORE	CFWW	JEWEL	FIELD SITES
Lay	Leadership research and think tank		Biennial communal lay leader pilot Fundraising network	
Professional	Leadership research and think tank	Consulting to professional development programs	Recruiting conference Community day high school leaders Jewel pilot for senior leaders Senior planning pilot	

3-YEAR WORKPLAN FOR POWERFUL IDEAS

	CORE	CFWW	JEWEL	Field Sites
Leading indicators	Development of leading indicator methodology			Leading indicators pilot
Research capacity for Jewish education	Paper on building research capacity for Jewish education			
Change in institutions	Institutional change study group			
Pluralism	Pluralism think tank			

3-YEAR WORKPLAN FOR INFRASTRUCTURE

	CORE	CFWW	JEWEL	Field Sites
Capacity		CFWW recruiting and management	Staff development Professor's group CFWW training	
Planning			Jewel planning	
Evaluation	Evaluation/feedback for all CIJE projects			
Lay leadership development	Board Chairman's Council			
Communication/codification	Web site Library Current activities Newsletter			

1-YEAR WORKPLAN

		CORE	CFWW	JEWEL	Field Sites
INSTITUTIONS	Synagogues	Synagogue research and think tank	Consulting to rabbinic programs	Conference on rabbinic education TEI	
	Early childhood	Early childhood white paper			
	Youth Programs		Consulting to Brandeis		
	Day Schools		Consulting to PEJE		
	JCCs		Consulting to JCCA		
LEADERSHIP	Lay	Leadership research and think tank		Lay leader pilot Funders network	
	Professional	Leadership research and think tank Building the profession research and think tank	Consulting to professional development programs TEI consulting follow-up	Recruiting conference Senior planning project Community day high schools	
IDEAS	Leading Indicators	Leading indicators methodology			
	Research	Research capacity paper			
	Institutional change	Institutional change study group Cases 1-5 Essay			

1-YEAR WORKPLAN CONTINUED

LUNCHEON SEMINAR	Pluralism	Pluralism think tank			
	Dissemination	Lunch seminar			
INFRASTRUCTURE	Capacity		CFWW start-up	Professors Staff development	
	Planning		CFWW planning	Jewel planning	
	Evaluation	Evaluation/feedback for all projects Scan Committee			
	Lay leadership development	Board Chairman's Council			
	Communication	External Internal			

CONFIDENTIAL - FINAL

MINUTES: CIJE STAFF TELECONFERENCE

DATE OF MEETING: August 4, 1997

DATE MINUTES ISSUED: September 19, 1997

PARTICIPANTS: Karen Barth, Gail Dorph, Ellen Goldring, Alan Hoffmann, Barry Holtz, Megan Ifill, Karen Jacobson, Erica Wolfe

CC: Sarah Feinberg, Adam Gamoran, Nellie Harris, Elie Holzer, Mort Mandel, Dan Pekarsky, Chava Werber

I. Staff Learning

II. Steering Committee

The Special Board Meeting attendees will be: Karen Barth, John Colman, Mort Mandel, and Lester Pollack in person, and Dan Bader, Bill Berman, Esther Leah Ritz, Chuck Ratner, and Bennett Yanowitz via teleconferencing.

Karen Barth will introduce Cippi Hart, Nellie Harris, and Elie Holzer and they will talk briefly about themselves. The Biennial will also be introduced briefly.

The *Costs of Jewish Education* will be taken to the Steering Committee for further review and discussion.

Sherry Blumberg, Jane Shapiro, and Jane West-Walsh will speak for five minutes each on TEI progress

III. Time Sheet

Everybody needs to turn in their time sheets promptly.

IV. Budget Process

On September 8, Karen Barth, Bob Dietz, Karen Jacobson and others will meet to draft the 1998 budget. Bob Dietz and Karen Jacobson will finalize the budget for the next steering committee meeting.

V. PEJE

Naava and Josh would like CIJE to do a best practices study in day school. Should we do this? Options discussed included doing case studies, a team of writers in different schools, a newspaper-type summary of schools, a series of conferences and possibly discussion of day schools, preschools, and supplementary schools. After discussion it was agreed that we don't have resources this year for this work.

VI. Hiring Update

Michael Paley will not be able to join CIJE to work on the biennial project.



COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

MEMORANDUM

To: Gail Dorph, Nellie Harris, Cippi Harte, Alan Hoffmann, Barry Holtz, Elie Holzer, Karen Jacobson, Nessa Rapoport,

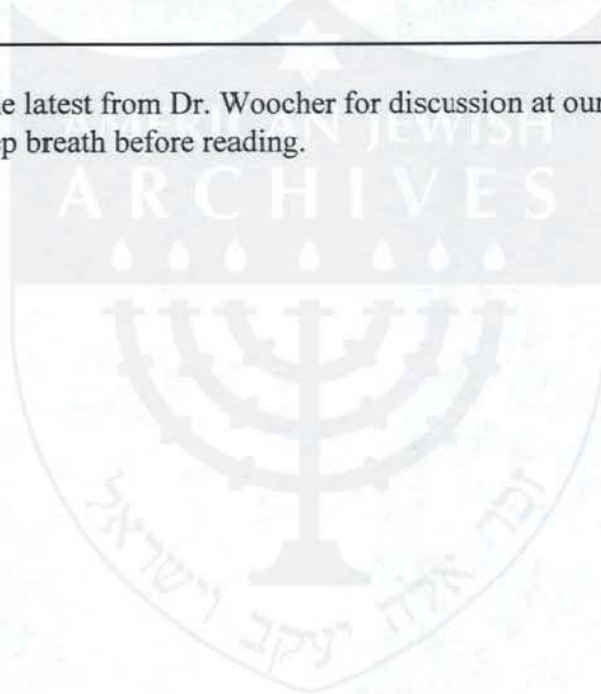
From: Karen Barth

cc: Adam Gamoran, Ellen Goldring, Dan Pekarsky

Date: August 14, 1997

Re: Draft Proposal for a Research Consortium and Think Tank on Jewish Continuity

Enclosed herewith is the latest from Dr. Woocher for discussion at our next staff meeting. Please sit down and take a deep breath before reading.





JEWISH EDUCATION
SERVICE OF
NORTH AMERICA, INC.

החברה למען החינוך היהודי
בצפון אמריקה

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Billie Gold
Neil Greenbaum
Mark E. Schlusel
Fred Sichel
Bennett Yanowitz

MEMORANDUM

TO: Karen Barth

FROM: Jonathan Woocher

DATE: August 13, 1997

SUBJECT: Draft Proposal for a Research Consortium and Think Tank on Jewish Continuity

I want to share with you and solicit your reactions to the attached draft proposal for a "Research Consortium and Think Tank on Jewish Continuity."

Credit for initiating the idea should go to Maury Seldin, a Jewish volunteer activist who lives in the Palm Beach area, and who for many years directed a think tank for the real estate field called the Homer Hoyt Institute. Why, he asked, given the importance all of us attach today to the new initiatives being mounted under the banner of "Jewish continuity," is there no systematic process for gathering, assessing, deliberating upon, and disseminating what is being learned from all of the programs and projects underway?

Well, as many of you know, JESNA and CJF have been trying to keep track of the continuity work going on in a wide range of venues, and both the quantity and quality of evaluation studies of continuity programs are increasing. But, we readily acknowledge that we've only scratched the surface of what can and should be done to ground new community, institutional and foundation-sponsored endeavors in a serious, ongoing, research-based learning process.

So, out of several months of conversations and correspondence, and the input of my colleagues here at JESNA and CJF, comes this proposal. With so many institutions having a stake in the initiatives being developed today, and with numerous (though not enough) Jewish researchers working on issues relating to Jewish identity, education, and commitment, it seems to us that the time is right for a collaborative effort to remedy one of the glaring deficiencies in today's continuity endeavor.

As the proposal indicates, we want to use the next several months to gather honest feedback on the idea of a research consortium and think tank from a variety of constituencies. Does the concept make sense? Are the functions identified for a consortium/think tank the right ones? Is the organizational structure feasible? Will potential funders — public and private — support such an endeavor?

**BEYOND FEAR AND RHETORIC:
A PROPOSAL TO CREATE A
RESEARCH CONSORTIUM AND THINK TANK ON JEWISH CONTINUITY**

THE PROBLEM: JEWISH CONTINUITY RESEARCH — THE MISSING ELEMENT

The 1990's have been the decade of "Jewish continuity." Beginning even before the release of the findings from the 1990 National Jewish Population Survey and with accelerating momentum thereafter, the North American Jewish community has launched a host of new programs aimed at enhancing Jewish identity and strengthening involvement in Jewish life. Communities large and small, and virtually every institutional sector of North American Jewry, have weighed in with commissions, reports, and initiatives ranging from Israel trips for teens to outreach to the intermarried, from family education to the founding of new day schools.

What Works & What Doesn't: The First Research Challenge

The scope and variety of these efforts have been impressive; their results are less certain. The difficulty in determining the impact of what has been done is partially a function of time: many of the initiatives are simply too new to judge fairly their long-term effects. But it is also a result of our failure to make evaluation — and research in general — a priority in the "continuity" endeavor. Out of hundreds of programs known to have been initiated, only a relative handful are being systematically evaluated as they are implemented. Evaluation is not simply a *post facto* means of assessing whether a program has "worked"; it is a critical component in making programs "work better" by providing the information that allows for adjustments and improvements as implementation proceeds. Thus, the first research challenge is to find out which programs work and which don't. Or, more accurately, which are most effective, in what dimensions, and at what cost.

Linking Practice to Theory: The Second Research Challenge

There is a second research challenge which the Jewish continuity endeavor in North America has thus far failed to address: the need to link program initiatives to a larger body of knowledge about the development of Jewish identity itself. Decades of sociological research have documented some of the broad dynamics of Jewish identity development in North America. But, increasingly, we are recognizing that we need a deeper, more nuanced, and more contemporaneous understanding of how North American Jews define, come to, and express their Jewishness. We need to understand the system within which change is taking place.

Our program initiatives today are by and large blunt instruments whose connection to any conceptualization of Jewish identity development is simplistic at best. Grounding programs in a

larger framework of both empirical knowledge and theory concerning Jewish identity will not only increase their likelihood of success, but enable us to use them to test hypotheses that can inform multiple initiatives.

Developing Strategic Approaches: The Third Research Challenge

Finally, there is a third gap in current continuity efforts which requires a research response: As we have moved further into practical work, it has become clear that new programs, by themselves, are *not* sufficient to produce the quantity and quality of change needed to have the dramatic impact on Jewish identity and commitment that we seek. "Continuity" is now seen to require *strategic* initiatives that involve structural and cultural change in core institutions (and in their relationships) and the knitting together of individual programs to create pathways and trajectories along which Jews can travel.

Here we face two key questions: "How do we produce this breadth and depth of institutional change?" and "What are the constellations of program initiatives that can generate genuinely synergistic impacts?" We have ideas and impressions about the answers, but hardly the solid information we would like as we urge institutions to take on the difficult work of transformational change.

A Plan is Needed

If the massive investment of energy and resources currently being made in the name of "Jewish continuity" is to bear fruit, we must undertake a serious, continuing research and deliberative endeavor aimed at anchoring new initiatives in the best current knowledge about "what works" and "how." This is an achievable objective at a reasonable cost. What is needed is a practical plan for getting there — which we supply below — and a commitment of resources from both "public" and "private" Jewish sources — which we hope this proposal will inspire.

THE SOLUTION: A RESEARCH CONSORTIUM AND THINK TANK

The failure of the Jewish community to engage seriously the research agenda surrounding "Jewish continuity" is, happily, no longer due to a lack of interest or awareness of how research might contribute to this endeavor. More communities and institutions *are* seeking to evaluate their new programs — often at the insistence of funders. Sponsors of projects on institutional transformation are trying to document the course of these complex processes and even to come together occasionally to "compare notes" on what is being learned. Exciting new basic research on the configurations of Jewish identity is underway, looking beyond behavioral check lists and cross-tabulations to analyses of life narratives and the contextualization of Jewish development within contemporary American religious and ethnic dynamics.

Pieces of what is needed exist. The challenge now is to bring these pieces together; to

augment them planfully with additional research — programmatic, strategic, and theoretical; to summarize and synthesize what is being learned; and to convey this knowledge to those working on the front lines, while at the same time enlisting them as sources and supporters for the continuing research endeavor.

The Consortium: What It Will Do

To do this, we propose to establish a “Research Consortium and Think Tank” for Jewish Continuity (“the Consortium”). The Consortium’s mission will be to generate and utilize research to enhance the efforts being made in the Jewish community today to build Jewish identity and revitalize Jewish institutions. More specifically, the Consortium will:

Be an Information Source

- gather and disseminate relevant information about current Jewish continuity initiatives, including monitoring and publicizing key trends and developments in this work.
- compile, analyze and distribute results from continuity program evaluations.

Be a Research Catalyst and Research Agency

- Advocate for relevant research at all levels necessary to the vitality and success of the Jewish continuity endeavor.
- Carry out and/or commission selected large-scale research projects aimed at advancing the state of our knowledge about specific areas in which multiple initiatives are under way (e.g., teens, families, institutional change).

Be an Agent for Change

- Convene practitioners, institutional leaders and researchers in seminars and colloquia to learn from one another’s work and to deliberate on directions for further policy and program development.
- Facilitate dialogue about the implications of basic Jewish identity research for program directions and developments.

The Consortium will be *impact oriented*. Its value will be judged not merely by the quantity and quality of research disseminated or the number of seminars held, but by whether these activities do in fact enhance the effectiveness of continuity endeavors. To the extent that this occurs and can be demonstrated, the Consortium will merit the support of funders — communal and private — who want to see their investments in new initiatives yield a maximum return.

How It Will Operate

As its name implies, the Consortium will be a collaborative endeavor, whose stakeholders will include researchers, policy makers, the institutions that engage and serve Jews, and funders. The Consortium will build on the activity currently being undertaken by JESNA/CJF in the areas of data-gathering and dissemination, program evaluation, and leadership networking and education, but will incorporate additional partners, both individual and institutional. The aim will be to build a broad coalition with common objectives and a commitment to sharing knowledge, but which allows for diversity of efforts and perspectives. The coalition will operate as a Consortium.

The bulk of the Consortium's work will be carried out by the institutions associated with it and independent researchers it commissions to undertake studies. The core staff will be small, and will be responsible primarily for developing and monitoring the Consortium's work plan and for organizing the dissemination and deliberative processes that will ensure its impact and effectiveness. One specific goal of the Consortium will be to recruit additional researchers from relevant disciplines whose work can augment and complement existing research. A managing board of stakeholder representatives, including funders, will guide overall policy and be responsible for the financial viability of the Consortium. At the outset, it is anticipated that CJF and JESNA will play the role of "lead" members of the Consortium and provide the initial infrastructure needed for it to begin operations.

A key to the success of the Consortium will be its direct connection to the institutions and individuals who are engaged in doing Jewish continuity work. In the past, research studies have frequently failed to have an appropriate impact on communal policy and practice because;

- (1) no provision was made for active dissemination to the "right" people along with a broad-based deliberation on the implications of research findings for activities on the ground;
- (2) leaders were not sufficiently educated on how to utilize research on an ongoing basis; and
- (3) there was a lack of appropriate follow-up to determine whether research was in fact impacting policy and program development.

As both a research entity and a "think tank" which will sponsor colloquia, seminars, and leadership education programs, and as a collaborative initiative of a wide range of stakeholders, the Consortium will be able to bridge the gap between study and practice to an extent not previously achieved.

THE PROCESS: HOW WE GET THERE

The Research Consortium and Think Tank that we envision will not emerge by fiat or fully formed. Nor should it. A process is needed which allows for testing of the concept, the enlisting of stakeholders, and the accumulation of experience which can be brought to bear on producing a final design for the Consortium's structure, operations, governance, and funding.

We propose that this process incorporate four phases:

Phase One: Preliminary Design (August 1997 - January 1998)

This proposal is itself the first step in the process. We will circulate this document to a representative group of the stakeholders whom we envision as participants in the Consortium. Based on their feedback and a possible face-to-face meeting at the November 1997 CJF General Assembly, we will redraft the proposal as the working document guiding development of the Consortium. The document will then be shared with a larger group of prospective supporters of the initiative, including potential funders.

Phase Two: Building the Agenda (February 1998 - June 1998)

The second phase of the development process will focus on better understanding what is currently known and what needs to be known to guide Jewish continuity work. The major event in this phase will be an invitational colloquium to be held in June 1998. At the colloquium, participants drawn from all of the potential stakeholder groups will review and assess the work that has been done thus far in program evaluation, Jewish identity research, and strategic analysis (e.g., of institutional change). Colloquium participants will also generate agendas for future work in each of these areas, as well as ideas on how to manage dissemination of and deliberation on research findings in ways that enhance their likely impact on policies and programs.

Phase Three: Pilot Projects (September 1998 - August 1999)

Based on the work in phases one and two, the Consortium will be formally launched in September 1998. During its first year of operation, the Consortium will mount three pilot projects focused on different substantive areas and illustrating different modes of activity. For example, it might: a) undertake a meta-analysis of evaluations of family education programs seeking to identify the educational and organizational factors that contribute to success; b) commission a study of how a number of synagogues are succeeding in increasing member participation and enthusiasm; and c) organize a seminar of researchers, lay leaders, and educators to consider the implications of the latest qualitative research on Jewish identity for adolescent, young adult, and adult programming.

During this pilot project phase the "kinks" will be worked out of the Consortium's operation. Issues surrounding capacity, timetables, supervision and coordination, dissemination, publicity, relationships with stakeholders, the feasibility and value of various types of activities will all be addressed in practice. This experience will allow for design modifications at an early stage in the Consortium's life.

The pilot phase will also be used to enlist additional sponsors/participants in the Consortium's work and to attract the financial support needed for more extensive operations.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

MEMORANDUM

To: Staff

From: KAB

Date: August 14, 1997

Re: "Annual report"

Enclosed is a draft of our "annual report". Please look it over before the September 4 Staff Meeting. We really need your input (especially yours Alan).



FRONT COVER

CIJE Name and Logo

Twersky Quote

INSIDE FRONT COVER AND FACING (FIRST) PAGE

Photograph (INSIDE FRONT COVER)

Who We Are and What We Do

CIJE is an independent national organization dedicated to the transformation of North American Jewish life through Jewish education. We promote educational excellence by developing:

- Lay and professional leadership for Jewish education.
- Strategies for change, in partnership with educating institutions, communities, and national organizations.
- Innovative ideas for educational policy and practice.
- Models of successful Jewish teaching and learning in a range of settings.

CIJE is committed to placing powerful Jewish ideas at the heart of our work; to bringing the best of general education to the field; to using rigorous research and evaluation to inform decision-making; and to working with a range of organizations, foundations, and denominations to make outstanding Jewish education a communal priority.

where is
building the
profession

FIRST DOUBLE-PAGE SPREAD (PAGES 2-3)

Photographs and Quotes

Developing Leaders

Great leaders make possible great learning. Their knowledge and passion transform education from business-as-usual into a richer, more vibrant Jewish future.

CIJE is working to strengthen communal and professional leaders by bringing to them state-of-the-art thinking about learning, teaching, and professional development from contemporary education, illuminated by traditional Jewish thought.

The CIJE Teacher Educator Institute (TEI), supported by the Nathan Cummings Foundation, immerses outstanding educators in cutting-edge educational thinking and practice. Participants then serve as mentors and advocates in institutions and communities across the continent.

The CIJE Institute for Leaders in Jewish Education provides principals of Jewish schools with visionary approaches and new strategies for leadership through a dynamic colloquium with eminent Jewish thinkers and national leaders in general education.

The CIJE Seminar for Professors of Education brings together outstanding professors of general education to study Jewish sources, share information and ideas, and explore applications of their expertise to Jewish education.

The Evaluation Institute, supported by the Jacob and Hilda Blaustein Foundation and in partnership with JESNA, is a center designed to model cost-effective evaluation and reflective practice.

SECOND DOUBLE-PAGE SPREAD (PAGES 4-5)

Photographs and Quotes

Creating Strategies for Change

New visions, strategies for change, and standards of excellence can transform Jewish educating institutions.

CIJE works to renew Jewish learning and teaching in varied educational settings. By employing powerful visions of Jewish education and strategies for change, CIJE helps to achieve excellence in Jewish education within communities, foundations and national Jewish organizations.

The CIJE Goals Project, developed with the Mandel Institute in Jerusalem, engages Jewish leaders and institutions in a challenging effort to develop and implement their visions of Jewish education.

CIJE Consultations bring innovative thinking, practice and resources into institutions of Jewish education and community organizations, encouraging growth through planning, professional development, and systematic evaluation.

CIJE Consultations

*Hebrew Union College/Jewish Institute of Religion
Synagogue 2000*

*The University of Judaism
Torah U'Mesorah*

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Brandeis?
(Cleveland) -

THIRD DOUBLE-PAGE SPREAD (PAGES 6-7)

Photographs and Quotes

Advancing Ideas

Infusions of new information and ideas are essential to the effort of transforming Jewish education.

CIJE commissions research and promotes new thinking on educational philosophy, practice, and policy. As ideas are developed and disseminated, they can be applied to the educational practice of synagogues and schools, camps and community centers, and other institutions.

The CIJE Study of Educators has produced a wealth of new data on the commitments, professional development, and working conditions of Jewish educators. Findings from Atlanta, Baltimore, and Milwaukee are being amplified by studies conducted in Chicago, Cleveland, Columbus, Kansas City, and Seattle, using the **Manual for the CIJE Study of Educators**.

The CIJE Essay Series, CIJE Policy Briefs, and CIJE Research Reports inform efforts to improve professional development, identify models of excellence, and mobilize communal support for Jewish learning. CIJE publications are widely distributed, bringing research as a basis for policy to North American Jewish communities.

CIJE Publications

CIJE Best Practice Series

CIJE Essay Series

CIJE Policy Briefs

CIJE Research Reports

FOURTH DOUBLE-PAGE SPREAD (PAGES 8-9)

Photographs and Quotes

Learning from the Field

Models of success in formal and informal educational settings are powerful tools for inspiring excellence in Jewish teaching and learning.

CIJE is working to develop models of educational excellence for North American Jewish education. This work is done "in the field," where institutions can function as laboratories for educational reform.

The CIJE Best Practices Project offers Jewish educators and institutions, early childhood programs, supplementary schools, and Jewish community centers a range of examples where exciting Jewish education is being achieved by imaginative teachers and enthusiastic learners.

The CIJE Early Childhood Initiative is developing ideas and translating strategies from university-affiliated lab schools to early childhood programs in Jewish agencies, encouraging learning among very young Jewish children and touching the lives of their parents and families.

The CIJE Leading Indicators Project is an initiative to identify critical dimensions of educational effectiveness. In partnership with a consortium of institutions, CIJE is exploring new methodologies for tracking "leading indicators" of educational success.

not formal
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In partnership w/ other instits
& experts,

FIFTH DOUBLE-PAGE SPREAD (PAGES 10-11)

Photographs and Quotes

Looking Ahead

CIJE has developed its own strategic plan and agenda of critical issues to be addressed in Jewish education. Building on current initiatives, the plan calls for expanding four primary areas of work:

Developing Leadership: CIJE will plan and adopt a comprehensive approach for developing outstanding professional and communal leaders. Working with existing institutions, CIJE will help to build the system of Jewish education, from recruitment to in-service training of future leaders.

Consulting: CIJE will develop a network of experienced consultants to help Jewish educating institutions articulate and implement their goals.

Advancing Ideas: CIJE will expand its commitment to rigorous research and to bringing together leading thinkers from a range of disciplines to contribute strategies, tools for practice, and publications to the field.

Field Sites: In partnership with local educating organizations and institutions, CIJE will test and refine ideas in selected field sites in order to learn lessons for educational reform from direct experience. In time, these sites may serve as models of excellence or as a baseline for the work of others.

PAGE 12

CIJE Board, Chairman's Council, and Senior Staff

INSIDE BACK COVER

Photographs

Credits

CIJE Addresses, Telephone, Fax, E-Mail, etc.

BACK COVER

Photograph(s)



CONFERENCE ON RABBINIC EDUCATION

The American rabbinate is in flux. With synagogue transformation in the air and the baby-boomers coming into middle age, the congregational rabbi is being called upon to fulfill new roles and to carry out old roles in new ways. At the same time, more and more rabbis are moving into careers outside of congregational settings.

The leaders of the major rabbinical schools are struggling to respond to the challenge of these changing realities. Many of the major schools are in the process of looking at how to revamp their programs. They are talking about rabbis as spiritual leaders, rabbis as change agents, rabbis as educators (in the broadest sense), rabbis as community builders, rabbis as chaplains, rabbis as pastors, rabbis as outreach workers. They are trying to define what these mean in relation to educational goals, curriculum, pedagogical approaches, campus life, role models, field experience and many other aspects of their programs. At the same time they are struggling with the reality that most incoming students need an enormous amount of basic learning in language and texts.

In the course of CIJE's consulting work with some of these institutions, it has become clear that they have much to learn from each other and that they might also gain from learning about state-of-the-art thinking from outside of the Jewish world: e.g. from the field of general education in such areas as faculty training, curriculum development, mentoring programs, models of teaching and learning, goal definition, and from approaches used to train leaders in other fields.

THE OBJECTIVES OF THE CONFERENCE

We are proposing to plan and hold a conference that will bring together the leaders of rabbinic education programs from around the world. The objectives of the conference will be four-fold:

- 1) **Reflection** - To provide the leadership of rabbinic education programs with an opportunity to step outside their daily environment and reflect upon the changes happening in rabbinic roles and the implication of these changes for rabbinic education.
- 2) **Idea Sharing** - To provide a forum in which ideas can be shared and leaders can learn from each other.
- 3) **New Perspectives** - To present and discuss ideas from related fields of endeavor such as: business, general education, political science, and the training of leadership, that might stimulate new thinking about rabbinic education.
- 4) **Discussion of ongoing needs** - To encourage these leaders to think about whether they might benefit from meeting or working together in an ongoing way, and, if so, in what context this might take place.

THE CONCEPT

In the business world, conferences are occasionally organized between the top executives of an industry, bringing together corporate leaders from competitive organizations who otherwise might not ever have occasion to speak to each other. At these conferences, with the help of highly skilled facilitator, these leaders have an opportunity to discuss the big issues that the industry as a whole faces and to exchange ideas with others who are facing these same issues. Typically, such conferences include brief presentations by a select few industry analysts and thinkers. These are usually delivered in an interactive style, keeping lectures to a minimum. Senior executives find these gatherings extremely interesting and helpful, and very rarely turn down an chance to attend.

Our concept is patterned after this model. We will bring together the senior leaders of the world's rabbinic education programs in a setting conducive to roundtable discussions. The group will be a small one in order to encourage interchange of ideas during the formal program and also during the informal parts of the conference. Facilitators will help ensure that the conversation stays focused. Presenters will offer new ways of thinking that would seed the deliberations with new ideas.

THE PLANNING PROCESS

We will convene a planning meeting to which representatives of all the institutions will be invited. The international institutions and those finding it difficult to travel can join by teleconference. This planning group will decide on the agenda, the invitation list, the topics to be discussed, the presenters and the logistical arrangements. Recommendations in each of these areas will be prepared in advance of the planning meeting by CIJE staff, based on phone calls with the participants.

PROGRAM

We envision a 3-day, 2-night conference. Some of the issues that might be addressed are:

- ◆ Changes in rabbinic roles and their implications for educational goals and programs
- ◆ The development of the rabbi as a spiritual person
- ◆ Approaches to teaching and learning inside and outside the classroom
- ◆ The recruiting, training, development and ongoing management of faculty
- ◆ Improving the educational effectiveness of mentoring and field work programs

- ◆ The role of rabbinic education programs in the ongoing development of rabbis after graduation.

The program will be developed by the planning committee but will likely include some or all of the following:

- ◆ Facilitated roundtable discussions on key issues
- ◆ Brief presentations followed by discussions with leading thinkers from other relevant fields
- ◆ A panel/discussion with leading congregational rabbis
- ◆ A session devoted to sharing of specific new ideas and to discussing experiments currently underway
- ◆ Text study
- ◆ A discussion of what ongoing meetings or collaborative projects might be fruitful.

INSTITUTIONS TO BE INVITED

Our initial thoughts are that the following institutions should be invited:

- ◆ Hebrew Union College
- ◆ Jewish Theological Seminary
- ◆ University of Judaism
- ◆ Reconstructionist Rabbinical College
- ◆ Yeshiva University
- ◆ The Academy for Jewish Religion
- ◆ The Leo Baeck College
- ◆ Jews College of London
- ◆ Seminario Rabinico Latinoamericano, Argentina

- ♦ Any other major Orthodox seminaries interested in attending

The smaller institutions will be invited to send up to two people, the larger ones up to three. This would mean a group of roughly 25, plus presenters and CIJE staff.

LOGISTICS

Our initial thinking on the logistics is to hold the conference at the Chauncey Conference Center in Princeton, New Jersey. This conference center is 1½ hours from New York City and 1 hour from Newark Airport. It is a beautiful, secluded spot with rolling lawns, ponds and garden and modern, business-like meeting facilities. It is less “corporate” than most such facilities but still efficient and comfortable.

Kosher food can be brought into the facility from a nearby kosher caterer, heated and served by the Center’s kitchen staff. A local *Mashgiach* would be hired to oversee the food service.

* * *

It is our firm belief that development of dynamic, inspiring leadership is the most important challenge in the revitalization of Jewish life in North America, and that the education of rabbis is an important place to start reexamining the way the Jewish community prepares people for leadership roles. This conference could become a catalyst for important change in the way rabbinic leaders are recruited, trained and developed, and could ultimately have far-reaching impact on the preparation of all types of leaders for Jewish organizations.

SECOND GENERATION SYNAGOGUE CHANGE PROJECT

PROJECT BACKGROUND

CIJE is committed to the revitalization of Jewish life through education. We believe that development of vibrant synagogues as centers of Jewish learning and living is a critical -- perhaps the most critical -- factor in meeting this challenge. As Dr. John Ruskay, Group Vice President Program Services, UJA-Federation of New York, wrote in *The Journal of Jewish Communal Service* (Fall/Winter 1995/96):

For Jewish education to be effective, there must be Jewish community in which what is being taught is visible and valued....If communal policy seeks to strengthen Jewish identity for marginal Jews, then creating compelling, engaging, inspired communities and institutions is necessary and must become a more significant communal strategy. Synagogues, JCCs, Hillels, and Jewish summer camps are of particular significance in the creation of compelling communities. For it is precisely in these institutions that marginal Jews encounter Jewish life. And of these institutions, the synagogue is of particular import because more Jews cross its portals than any other institution.

The synagogue today is in trouble. While 40-50% of U.S. Jews are members of synagogues, few of these seem to be seriously involved on a year-round basis in the study programs, prayer services and volunteer activities that the synagogue offers. Rabbis and synagogue lay leaders report frustration that so many members view their membership dues as a fee-for-service that buys them access to high holiday tickets, education for their children and the availability of a friendly rabbi for life-cycle occasions. Focus groups with less engaged members suggest that many find these occasional encounters with the synagogue to be unexciting and irrelevant to their lives.

Is it possible to change this? Is it possible to create synagogues where the majority of members are actively involved on a year-round basis? Where both adults and children are engaged in serious learning, prayer and volunteer work? Where these activities are infused with a sense of real meaning and are a vehicle for spiritual growth? Where even those who have previously rejected organized Jewish life can find something worth coming home to?

There are reasons to believe that it is. Around the country are examples of charismatic Jewish leaders who have created a synagogue, Hillel or adult study program that has begun to engage people on a large scale. In the Christian world, the mega-church phenomenon has demonstrated that redesigned churches can attract tens of thousands back into church life.

These examples give us hope, but there is still much work to be done to create a culture

of excellence in synagogue life with sufficiently developed models to inspire and guide the revitalization of synagogues on a broader scale. Around the country, there has been a wave of synagogue change projects. These include the Experiment in Congregational Education (ECE), Synagogue 2000, the McKinsey Synagogue Project and many smaller projects sponsored by federations, foundations and individuals. These projects, while relatively new, have already achieved some inspiring successes. However, many of us who have been involved with synagogue change projects feel that the success rate and the degree of change has been lower than we would like to see, and that we might benefit from stepping back, reflecting on what we are doing, and building a second-generation approach to synagogue change.

SUMMARY OF PROPOSAL

In the belief that such an effort is of critical importance, we are proposing to develop this second-generation approach to synagogue change, to pilot it in select synagogue settings, to systematically study and learn from our experience and to disseminate the findings. The objectives of the project we propose go far beyond the development of a few great synagogues. They include:

1. Beginning to create a knowledge base about synagogue change that can inform the thinking of those doing this work around the country
2. Creating written materials that can be broadly distributed and used in the training of rabbis, synagogue lay leaders and others in key leadership positions
3. Helping to push forward the thinking of the key people running major synagogue change projects by providing them with an opportunity to learn from each other's experience and to reflect on their own experience
4. Facilitating the development of a few synagogues as models of excellence that can become resources for the broader dissemination of the ideas and approaches that they have developed.

OUR APPROACH TO THE PROJECT

Our thinking about how to develop this second-generation approach to synagogue change brings together three significant elements which we believe will, through their dynamic interaction, produce credible and significant results:

1. Ideas about effective institutional change grounded in the experience of CIJE staff and consultants facilitating change in a variety of settings, as well as in systematic studies of change processes in different contexts

2. Commissioning a careful review of recent synagogue-change projects, a review designed to maximize our learning from what has already been tried
3. Establishing a leadership-team for this project that includes thoughtful and imaginative individuals with a range of important and complementary competencies who are serving as leadership in current change-efforts. The job of this team will be to scrutinize the ideas and findings identified in 1. and 2. and together to develop the project's second-generation approach to change

CIJE'S emerging ideas about change

Based on our work and research to date, we believe that effective institutional change requires systematic attention to six elements:

1. **Vision** - A clear articulation on the part of the leaders of the change project of the nature of the changes that the project is seeking to create, i.e. a clear statement of what about the new model is different from the old one. Such a vision must be based on ideas that are powerful enough to inspire real transformational change
2. **Leadership** - Internal leadership that is ready and capable of driving the change process. The leaders must be truly "on board" with the vision that the outside organization is offering
3. **Change process** - The project must have a change process that lays out the steps necessary to move the organization from where it is today toward the vision for the future. While every situation is different, such a process usually includes ways of involving a broad base of people in the change process and building toward consensus, a methodology for customizing the project's overall vision for the individual institution, an approach to communication with various constituencies, the development of a change leadership group, the design of the research, analysis and decision-making mechanisms necessary to put change initiatives in place, and a way of addressing the likely obstacles to successful change
4. **Culture** - The culture of the organization must support the desired changes. If it does not, specific approaches are needed that can move the culture and the mind-set of the congregation forward
5. **Skills** - The skills of the people who must do the work almost always need to be retooled in order for them to succeed in the changed environment. Change projects often deal with the above four issues but forget to address the skill needs of the people who will be left with the job of actually implementing the changes

6. **Resources** - The organization must have sufficient human and financial resources to implement change

Based on this model of change and other insights that have emerged in the course of our working with synagogues and other Jewish settings, we have developed a set of, we believe, powerful ideas about how to approach second-generation synagogue change efforts. While the design of the project allows for the possibility that these ideas will undergo interpretation and revision as the work unfolds, we are confident that they will significantly shape the direction of the work. They are:

- Clear specification of the **vision** of the revitalized synagogue, with a stronger focus on building something that works for “outsiders” to synagogue life
- An emphasis on encountering powerful Jewish ideas which have the capacity to illuminate the process and aims of the change project
- Extensive skills and ideas training built into the process for lay and professional leadership and for other employees of the synagogue
- Tough “admissions” requirements for synagogues with particular attention to the issue of leadership and to the availability of resources
- Sufficient planning time and resources up-front for careful design of the change process, based on serious reflection and analysis of what is working, what is not working in current synagogue change programs, and why
- A focus on serious Jewish learning as both a vehicle for change and an end product of change
- Sufficient funding and a small enough number of congregations to allow for intensive consulting resources to work with each synagogue
- Selection of synagogues from one geographic area to facilitate frequent meetings and cross-fertilization of ideas

In addition, while this project would address all aspects of synagogue life, we feel that there is a particular need to deal with the synagogue as a center for education. When we say education we mean it in the broadest sense as **the transmission of culture across generations**. Therefore, we believe that this project must pay careful attention to:

- Methodologies for education of adults that can both inspire and inform
- The challenge of the education of children and families i.e. the redesign of the system of supplementary education in synagogues

The leadership team

We propose to put together a leadership-team that brings imagination, critical thinking, substantial experience with synagogue-change, and to put in its hands the responsibility for jointly developing this second-generation approach to change to change. Our current thinking is to include the following people:

<u>Name</u>	<u>Institutional Affiliations</u>	<u>Committed</u>
Karen Barth	CIJE	Yes
Larry Hoffman	HUC/SYN 2000	
Ron Wolfson	UJ/SYN 2000	
Linda Thal	UAHC/ECE	Yes
Isa Aron	HUC/ECE	Yes
Barry Holtz	JTS/CIJE	Yes
Jonathan Woocher	JESNA	
Rob Waitman	McKinsey & Company	Yes
Carolyn Keller	Boston CJP	
Daniel Pekarsky	CIJE/University of Wisconsin	Yes

Reviewing first generation change efforts

Our plan is to hire researchers who will meet with the leaders of major synagogue change projects and with the lay and professional leaders of a representative group of the synagogues themselves. Interviews would be conducted in order to understand how the nature and the aims of the change process are understood by those engaged in those projects and to assess the degree of change underway, the extent to which the process itself helped or hindered change, the major obstacles to change and the key factors in examples of success. Cases would be compared to evaluate whether there are any systematic differences between the synagogues that are achieving greater success and those that are less successful. The researchers would also look at the ways in which Jewish learning and Jewish ideas are integrated into the change process.

The leadership team would meet 5-7 times to review and interpret the research as it unfolds and to begin to debate and design a next-generation change process. A small working group would meet more often to plan these meetings and pre-digest the research data.

THE PROJECT TIMELINE AND WORKPLAN

Year 1 of the project would be devoted almost exclusively to research and design of the process.

Midway through Year 1, we would begin to recruit synagogues and consultants for a project to start up at the beginning of Year 2. The leaders of the selected synagogues and the consultants would be brought into the design process toward the end of Year 1.

Year 2 would kick off the actual testing of the second-generation process. It is impossible to detail the exact activities of Year 2 ahead of time, since the specifics will be developed during Year 1, but it is likely that they would include some or all of the following:

- An intensive training program for lay and professional leadership focusing on powerful ideas that can help them to build a communal vision, and on the techniques of change leadership that can help them turn the vision into action
- A training program for the consultants to ensure that they are working with the synagogues in a consistent way and that have the necessary tools to do the work
- A retreat for participating teams from each synagogue to enable them to learn from each other in an intensive environment and to provide an opportunity to model the types of changes that are encompassed by the project's vision of a synagogue
- 4-6 additional meetings of the synagogue teams to touch-base and share problems and successes
- Intensive consulting support for the synagogues to guide them through the process and keep things moving forward
- A travel program for members of synagogue teams to visit centers of excellence.

In addition, the researchers would continue to work with the project to provide feedback to the leadership team, which would meet regularly to make mid-course corrections.

In Year 3, the project would likely begin to intensify its focus on making change happen within congregations. Ongoing consulting support and training for the synagogue leadership would continue to be provided and at least one retreat would probably be held for the synagogue teams. The process of ongoing reflection by the leadership team would continue, and the results of the first two years would be written up for publication.

All evidence suggests that three years is too short a time frame to complete a process of synagogue change. We are looking for funding partners who are willing to consider a renewal of funding for a second three-year period, if the evaluated results of the first three years suggest concrete direction and real promise for the future.

CIJE EXPERTISE

CIJE staff members and consultants bring unique expertise to this project. Karen Barth, Executive Director of CIJE, brings 10 years of experience working with large corporations on issues of change and innovation. She also has extensive experience with change projects in Jewish organizations and has been intensively involved in several important synagogue change projects. Barry Holtz, a Professor at the Jewish Theological Seminary and a consultant to CIJE, brings knowledge and experience about education in the synagogue setting. Dan Pekarsky, a Professor of Education at the University of Wisconsin and a consultant to CIJE, is an expert in questions of educational vision. He is one of the leaders of The Goals Project, a collaborative effort between CIJE and the Mandel Institute in Jerusalem to create new approaches for helping educating institutions to articulate and realize their visions.

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The time is right for the development of effective methodologies for synagogue change. The demand is there from synagogue and communal leaders. The current projects will continue and new ones will start, but if we cannot build effective change techniques informed by compelling visions of congregations and of Jewish life, we run the risk that the "synagogue change movement" will become a fad that in its disappointments will leave a bad taste for decades. On the other hand, this enormous interest in change is a terrific opportunity. If we can take advantage of this energy and openness to change, we have the potential to create vital institutions that could be at the very center of the revitalization of Jewish life in North America.