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CIJE staff retreat. Minutes and supporting material,
February 1998.

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MEMORANDUM

TO: Adam Gamoran
FROM: Shahrazad Ahmed
DATE: March 5, 1998
SUBJECT: Staff Retreat, February 4 & 5, 1998

Here is the packet of Minutes and supporting materials from the Staff Retreat meeting, February 4 & 5, 1998.

STAFF RETREAT SCHEDULE

Wednesday, February 4

9:00 – 10:00 Learning (Mike)

10:00 – 12:30 Synagogue Change Research Project (Karen)
Goals Project (Danny)
Change Think Tank (Danny)

12:30 – 1:30 LUNCH

1:30 – 5:00 JEWEL (Ellen)
Pilot
Planning Process
Lay Leadership Research Project

6:00 – 8:30 AT THE CIJE OFFICES (INCLUDING DINNER)
Leadership Forum (Cippi/Karen)
Baltimore/Cleveland pre-GA programs (Karen)
Professors

Thursday

8:30 – 9:45 AT CIJE OFFICE
Indicators and Evaluation Institute Telecon
Adam, Alan, Barry, Ellen, Gail, Karen, Susan,

10:00 Baruch College—RETREAT

10:00 – 11:00 Study (Mike)

11:00 – 12:00 Guiding Principles

12:00 – 12:45 LUNCH

12:45 – 5:00 Synopsis of Other Projects and New Projects for 1999 Workplan
TEI (Gail)
TEI video (Nellie)
Early Childhood (Gail)
Rabbinic Conference (Karen)
JTS (Karen)
She'arim (Gail)
Torah Umesorah (Gail)
Indicators/Evaluation Institute (Ellen)
Economics of Jewish Ed (Karen/Nellie)
CFWW Start-up (Karen)

CIJE

NEW YORK CITY STAFF RETREAT Wednesday, February 4, and Thursday, February 5, 1998 MINUTES

Wednesday, February 4

I. GOALS PROJECT - Danny

- A. Early on viewed as discrete project. Now viewed as integral to all projects. Everything we do needs to be informed by issues of vision and goals. A danger that this be our rhetoric and not what we really do. What would this project need to look like in order to help us do our work?

1. Infusing CIJE's work

What might it really mean to infuse our work with the spirit and meaning of this project?

What kind of infrastructure needs to be in place for these concerns to be part of what we do everyday?

- a. Goals/vision, etc. need to live in core of CIJE. If the goals project is to live in the context of the organization, then we need to find opportunities for whole staff to learn about this approach together in order to infuse our work with these ideas, concerns, ethos.
- b. In the day to day life of individual projects, each project needs to have a person attached to it that represents this dimension. Such a person needs to have the right sensibilities to raise the right questions at the right time plus be able to put pertinent ideas from the tradition into the project. Take each of CIJE projects and look at how issues of guiding principles fit into each project (development of grid).

2. Develop a vision-informed approach to change

CIJE's idea of working on issues of institutional change raises questions:

How does one help institutions change and grow?

How do we create an approach to institutional change that is vision-sensitive?

We are making some starts on this investigation, to wit:

- a. Dani Marom's work on educated Jew project
- b. Synagogue change research project

c. Guiding ideas study group (Change Think Tank) to think about the relationship between ideas and practice. This group has not yet had a sharp agenda. In view of our focus on institutional change, we think this group should take on the challenge of this task: How are we going to help foster institutional change that is vision-sensitive? As we think about reconstituting the guides group, we need to think about: Who are the people around the country that we want to wrestle with this problem? Create guidelines for a pilot in 1999.

3. Seeding the Culture

Nurture an appreciation and support for these ideas that could take the forms of:

Seminars for lay/professional leadership

Integrating the seminars into the leadership forum

Focused lay leadership projects

4. Generation of materials that explain and give examples

Explanatory tools to help us talk about goals

Cases of institutions informed by compelling visions (e.g., Fox piece on Ramah)

Cases that actually describe institutions changing because of vision

Background pieces for deliberation (e.g., approaches to thinking about Israel)

B. Change Think Tank

1. What kind of group will this be? Who are the people?

Entire CIJE staff

Amy Gerstein

Mike Rosenak

Alvan Kaunfer

Linda Thal

Danny Lehman

Devorah Steinmetz

Hank Levin

David Purpel

Annette Aronovitch (professor of philosophy and Jewish studies)

Michael Fullan

Deborah Ball

David Cohen

Head of McKinsey Change Center

Marjorie Tabanken

Development in third world country

Milbrey McLaughlin

Lorraine McDonald

Halakhic change

Jacob Katz

Debby Kerdeman
Modern Jewish Historians (modernity vs. Tradition)
Michael Silver (how has orthodoxy changed)
Isa Aron
Rolando Matalon
Joel Roth
David Ellenson
Jay Harris

2. What kind of people do we need?

Composition of the group needs to include philosophically minded plus context knowledgeable plus content rich in order to do the work.

Educated Jew-philosopher, ethnographer, describe your educated Jew. Go into a school where you help to create a curriculum and coach. Need committee members that can talk on several of these levels. See Exhibits 1 and 2 for a diagram on how this group might fit into our work.

3. The Change/"Guides" Group -- Year-end Goals

- ◆ What is our methodology for vision-informed change?
- ◆ What kind of people can do this work?
- ◆ What would a pilot project look like? Where? Who?

Other questions:

- ◆ How do we use the background categories suggested by Danny to do the goals work in 1998?
- ◆ Why is this a project in the field and not JEWEL? CIJE needs to test its mettle in real institutions.

Is the scaffolding of the building Goals or Change?

We've put a stake in the ground -- can't build serious building without leadership. What's the relationship in the construction of the building between leadership and goals? We have a sense that leadership, goals, change are all connected together.

What is the connection of the group to the sites? Develop methodology, which is then tried out in the sites.

We need to come back to how goals project will infuse work.

We need to come back to how the change group will influence the ongoing work.

LUNCH BREAK.

II. SYNAGOGUE CHANGE DISCUSSION (Exhibit 6)

After introducing Pearl Beck, who had joined us during lunch, Karen Barth and Lisa Malik sketched out the background to the Synagogue Change project. Lisa explained that out of the meetings thus far held, a number of research questions emerged and that one of our challenges is to review these questions.

1. How do the various projects understand "success" ?
2. How does the process unfold?
 - How does actual implementation compare with the envisioned process?
 - How have individual synagogues adapted process to meet their specific needs?
 - How does the actual outcome compare with the planned outcome?
3. What factors (in the Synagogue and in the change process) are associated with successful change?

Question 3 focuses on factors that are associated with successful synagogue change. These would include synagogue characteristics (e.g., the leadership) and characteristics of the change process. Here a question was raised concerning the need for criteria of success, with the additional question: *Whose* criteria? Perhaps the question of how institutions and change agents view success needs to show up in a separate question (other than being part of the map in the first question). Initially, our interest may be in how various "they's" view success, but eventually we may well have to articulate our own conception. A question was raised about whether we should be speaking about "worthy" or "significant" rather than "successful" synagogues, and a need was expressed to distinguish conceptually between a worthy (significant, successful, worthy) synagogue and a "successful" change project.

Responding to the foregoing discussion, KAB suggested that we need not address the evaluative 'what do we count as success?' question in the context of this project. This provoked some discussion of whether it is really essential for us to address this question, if not in this project then in the context of "Guides" or elsewhere. Do we, for example, have certain guiding principles at work in our approach to change?

We then turned to the research design and methodology issue. Lisa noted some fuzziness in B and C that concern the research methodology for the questions pertaining to process and factors concerned with success. We spent some time examining the point of the "conversations" alluded to in the document and how they might be structured and focused.

Lisa raised the question of the nature of the research approach which is still to be determined -- is this an academic approach, etc.? Lisa passed out the proposed time line, with questions indicated. Ellen raised the question of also doing a survey: Wouldn't we want to do a larger study after the interviews? Susan suggested that the time line design is much oriented toward question 3 or the proposal where question 2 has been short-changed. Also the research methods will do better with question 2 than with question 3.

Alan raised the question of the timing of going into the field. Seems to be too late in the process. We decided to establish a small advisory committee of Lisa, Karen, Cippi with Susan, Pearl and Ellen. We may also want to find one or two "outsiders" to serve as methodological advisers on this project.

III. LAY LEADERSHIP RESEARCH PROJECT

Karen introduced the discussion by talking about CIJE's continuing concerns about dealing with the issue of lay leadership support for Jewish education. She reported on the consultation held at the end of December. At that meeting some people raised the question: Is there a problem and what is the problem? Is it a shortage of quality people? Lack of money? Etc.

Can we look at institutions or situations where there is no problem? Where there really are sufficient numbers and support of lay people?

Are there things that are essentially "broken" about this situation? Why do we want to mobilize lay leadership?

Pearl offered some comments: We need to form one main research question. We can see two different directions: (i) why people join or do not join boards of Jewish educational institutions; and (ii) what are the components of a successful board. She asked whether we want to deal mostly with local organizations rather than national organizations.

Are we saying that lay leadership equals boards? Are there other ways that people as lay leaders are involved? Like continuity commissions or Jewish education task forces or family foundations. Are we talking about lay leadership or lay involvement?

It is not clear that when we say "mobilizing the community" we mean "boards". Maybe it means something else. Also, why do people not join -- important Jews who aren't members of boards. The American Jewish community has defined "leadership" as having money. It may be that there are people who don't have money who could be leaders. Could we learn about more than one thing -- not limiting ourselves to one question?

Ultimate purpose of this research is to help determine the program of JEWEL for developing lay leadership. Can we find out what lay leaders think they need to know and be able to do to be better lay leaders? Can we find what would it take to get people involved in Jewish educational institutions? What is the lay leader "career path"? What prevents people from "moving up"? What keeps them where they are? What about the family foundations -- a major source of wealth in the American Jewish community? Is it wealth that makes the difference? Many new institutions (like the community high

schools) are being created by inspired dedicated lay people who may not themselves be very wealthy? What about the "career path"/stories of institutions?

See Exhibit 3 for chart of three groups to study.

1. People in Jewish education
2. Jewish philanthropy but not in education?
3. Philanthropy, but not in Jewish philanthropy?

There is a danger in equating lay leadership involvement with community mobilization. What makes for an adequate lay leader? How do people in institutions view their own lay leaders?

It would be interesting to see if there is a difference between the lay leaders in Conservative institutions and in Orthodox and Reform institutions. In Conservative institutions it is said that there is less convergence between where the rabbinical leadership is and where the lay people are.

IV. JEWEL

Ellen handed out a summary of her Board Presentation. Goal: a flagship pilot by 1999 (Exhibit 7). At the December meeting the focus was on who the participants should be, and this matter needs to be addressed now.

A. Who do we recruit?

Alan suggested that participants should include people of great potential who work in institutional contexts. Stars or potential stars now working in institutions. Karen asked why we don't bring in teams of educators from institutions. Once field sites were in place this would be a good idea.

What should be the appropriate mix of stars and future stars? One consideration is the desirability of identifying people who, as a result of their participation, in the near future can substantially improve their institutions and to whom we could point.

If we pick super-stars who have already built good institutions, would there be much value added unless they go to other institutions? They would not necessarily stay, perhaps there is much room for improvement in their home schools, and they are voices that will be listened to. Who would mentor someone like them? It offers the possibility of a Mentor's Group and a training program for them.

Another alternative: a Seminar L'Morim of a very high quality aimed at high quality teachers. True, teachers can be educational leaders, but should this be the initial group?

Should the first cohort be stars or future stars? Another argument for stars is that they are people who can generate a lot of momentum quickly in support of quality education. Also, they would be great advocates for JEWEL and essentially solve our recruiting problem. On the other hand, before focusing on stars should we fine-tune the program? Long term benefits may be greater if we pick people who are not yet stars and who would be discernibly stronger if they went through this kind of program.

Conclusion: There are two perspectives on the question of who to recruit.

B. If we reach for the stars...

Recruiting stars means including in planning a "Guides"-like effort that involves Jewish and general expertise including an appropriate academic in Jewish education (like Susan Shevitz). A possible way to approach this would be to break the projected program into curriculum chunks and then find people who can represent the chunks.

What characteristics should the Judaica scholars have? Be capable of participating on the Planning Team. Later, we need to recruit people to teach in the program. Gail's hope is that Mike and Eli will continue working with the team.

How is the curriculum to be developed? Can the different pieces be developed by people who have not participated in the planning process? The planning team needs to ask what level of Jewish literacy do leaders need? The program's curriculum will not make up for "deficits" in people's Judaica knowledge. A bigger question is: What does it mean to *lead* Jewishly?

V. JEWEL PLANNING

Ellen distributed an outline of the scan (Exhibit 8).

Everyone should give feedback on the design of the scans and ideas about people who could do the scan.

Wednesday Evening Session, February 4

CLEVELAND/BALTIMORE Pre-GA PROGRAM

We are going to do it.

The next steps are:

- ◆ KAB/PCH will organize a one-day meeting of Mark Gervis, Harley Gross, Haim Botwinick and Lee Hendler. GZD will attend. BWH and ADH will join by phone.
- ◆ KAB/BWH will meet with Melitz and CAPE in Israel
- ◆ After the initial design, the team of BWH/PCH/NR will take the project forward.
- ◆ We will need extra help in Jerusalem. Possibly we should ask SDF to go.

Thursday, February 5

I. LEADERSHIP FORUM (Exhibit 9)

A. Steps in development of curriculum for Leadership Forum

1. State the problem (e.g., economics of Jewish education)
2. Study of the issue -- data gathering
3. Define the nature of the problem
4. Study appropriate Jewish texts and implications
5. What are the dilemmas in terms of action
6. Current approaches to the issue
7. Brainstorm new approaches

We can integrate some of our work, such as (i) What are effective Jewish educational institutions?; (ii) lay leadership; (iii) professional leadership; (iv) funding; and (v) creating vibrant institutions.

People should leave with some sense of CIJE's school of thought (e.g., goals, vision). If we do an Economics of Ed. Track, we need to make this school of thought run through it, without touting our specific programs. There should be a parallel between a good way/process of gathering data and conveying things that we value, such as the role of Jewish texts.

The direct inputs into this might be goals, institutional change, etc. There might be 5 tracks including choices such as economics and leadership.

What if people want to come to more than one track? We want people to stick to a track and avoid a GA-like atmosphere where people "shop around". The GA had choices of 45 concurrent sessions, not all of them good. This will be different; fewer tracks and higher quality.

Each track needs a separate coordinator. Perhaps have a separate plenary for each track. See Exhibit 4 for grid.

The model/process of the Forum itself should teach them about a process that is adaptable to their own settings. Then you have given them a "sheetah" for implementing this in their own communities. People should walk away from this saying, "A-ha! This is what CIJE is about." Do what Nessa always suggests: 5 lines of what we want people to know about us. A decision was reached to hold a retreat at Chancy to build the curriculum.

B. Who is going to coordinate all of this?

KAB will assign coordinators. We began filling in the chart. (Exhibit 4)

C. Names of speakers to approach:

Robert Reich
Raynold Levy
Michael Smith
Larry Cuban
Michael Fullan
Minister of HBS Case Study: Willow Creek Church
Lee Shulman
Linda Darling-Hammer
Len Shlesinger
Barbara Schneider
Sister Joelle
Debra Meier
Amitai Etzion
Ann Swisler (Swidlow?)

D. Commissioning papers

We should aim to have a plan by March 15 and then we can discuss this.

We have to be careful to give the same money to everyone. Do we have money for the papers? There is money for speakers in next year's budget. We have some money in this year's budget.

II. GUIDING PRINCIPLES (Exhibit 10)

A. Strawman

The goal is that each principle agreed upon has a page or two of explanation and explication, describing the principle. This would be for internal and external use. Internally, when we are making decisions we can be guided by the principles. When new people come into the organization this would serve to socialize them into the work and culture of CIJE. Externally, we should be willing to publicize them. For example, in the next brochure we would have the strategic plan and then the principles, the way we work. There may be some principles we do not want to publicize and we need to think about them.

B. Comments on the Strawman

More characteristic at this time is working with lay and professional partnership rather than working in partnership with existing organizations.

Add that our work is infused and informed by Jewish study and Judaic sources.

We need to add something about commitment to self-evaluation.

We need to add something about how we deal with personnel, i.e., family centered.

Personal and professional development.

On point about multi-disciplinary. We must make clear that we bring the best expertise in and out of Jewish education to bear on the issues at hand. Another feature is a certain type of educational thinking.

We use the term 'school of thought', but we have not articulated it yet. This needs to be articulated. For example, we use the phrase, the "big ideas." What do you mean? What is a big Jewish idea that you are using?

We need to add a nondiscriminatory statement, equal opportunity employer.

C. 'School of thought' needs to be a category of the guiding principles.

- ◆ Brainstorming about what would be in the school of thought: Our point of view about what makes quality education and quality Jewish educating institutions. What would "CIJE transformed" institution look like?
- ◆ Active participation
- ◆ Intellectual and personal meaning
- ◆ Personal and professional growth of all staff
- ◆ Education focused on serious Jewish content
- ◆ Leaders are educational leaders not just managers, rooted in teaching and learning
- ◆ "about something"
- ◆ Thoughtful about the students
- ◆ An ecology of the enterprise
- ◆ Active attention to the content, processes and goals. The cohesion correlation.
- ◆ There is a relationship between what they thought they were doing and what they are actually doing is tight, clear correlation
- ◆ Appropriateness to the goals, context, developmental stage of the participants, age, thoughtful about the students
- ◆ Explicit decision...rooted in a vision, lead to view of what is worthwhile activity
- ◆ Experiential learning
- ◆ Learning community - in class rooms - also teachers
- ◆ We believe there are not generic solutions to education problems. There is not a generic definition of what is a successful educational institution.

We need to add to the principles that all our work follows an educational lens. The point is that an effective Jewish educating institutions would need to have all the points in the school of thought.

D. How do we move 'school of thought' forward?

We need this school of thought for a number of initiatives, the forum, JEWEL, change group, etc. Is the school of thought about the process to transform institutions or about the outcomes, what a successful transformed institution will be?

Perhaps a more inductive process would be helpful. For example, what is an educational lens? What ought to be the way of doing? We are asking ourselves, how can we characterize what we have already, versus, OK, now how do we want to do our work at CIJE.

This is our orientation and cannot really get that explicit. We need to be clear enough, but cannot be so articulate in advance. How much of the orientation do we need to be able to articulate in order to begin to work with a synagogue, versus how much do we, CIJE, need to "know".

If we are going to stress the importance of struggling with designing a vision, then we need to struggle as well. A fundamental question in all our work is: How does the vision of the reformers interact with the vision of the reformees? How do visions get translated, where is the place of principles versus specifications? 'About something' versus buy-in from the folks on the ground?

E. Next Steps

- ◆ KAB - new list of principles, including and adding the school of thought and today's additions to the STRAWMAN.
- ◆ Pick a few things from the list to work on in the near term and articulate them.
- ◆ A rough skeleton underneath a few of the principles to gradually clarify the principles.
- ◆ This should be ongoing work of CIJE

III. UPDATES ON CIJE PROJECTS

In this session staff members briefly reviewed current projects and activities. Many of the oral presentations were supplemented by short written descriptions. (Attached.)

A. TEI (Gail Dorph - Exhibit 11)

1. TEI is a two-year teacher educator program aimed at professionals working with supplementary schoolteachers. The aim is to bring professional development in line with our school of thought. The program is now selecting its 3rd cohort and is instituting an application process. A Cummings proposal describes new directions aimed at working on barriers to implementing TEI inspired work.

2. SS and GZD are also working on revising the evaluation plans for TEI.

B. TEI VIDEO (Nellie Harris – Exhibit 12)

1. NH described the video experience, which is part of TEI. A video kit is almost ready to disseminate to current TEI participants. It includes a Facilitator Guide and other supporting materials. This is a pilot. Three additional videos as tools for professional development on different content topics are in the works. There may also be one on a mentoring case. Video use by participants will be evaluated.

C. Early Childhood (Gail Dorph)

Fran Jacobs has been working on the conceptualization of the area. The view is to include prebirth through age 5 and possibly some lab school setting in which good Jewish early childhood education should be demonstrated. A thinking group is being convened to prioritize the area and needed interventions. A number of persons are already identified, including Richard Cohen and Sam Meisels. A major tension for the field exists between a child-centered perspective and subject matter emphasis typical of Jewish education.

D. Rabbinic Conference (Karen Barth – Exhibit 13)

A Rabbinic Conference is planned, inviting leaders from seminaries in the US and abroad. Focus will be on how rabbis are trained and how their role as educators is conceptualized and enacted. The conference will be a first meeting with the hope of beginning a process that will encourage the seminaries to incorporate some of our school of thought and solve dilemmas facing them.

E. JTS (Exhibit 14)

JTS is currently considering a proposal for consulting services to help them in improving the rabbinical school. A proposal was distributed with further information.

F. She'arim (Gail Dorph)

The She'arim is a one-year teacher education program currently being planned by Silber and Steinmetz in NY. CIJE people including Gail, Sharon, Deborah, Marvin Hoffman, Eli and Nellie have been involved in the planning of an integrated teacher ed program for people with excellent Judaica background who are interested in elementary teaching. We are exploring the possibility of a future role in the program. It could be an excellent CIJE field site.

G. Torah u'Mesorah (Gail Dorph – Exhibit 15)

Torah u'Mesorah is a network of orthodox day schools. CIJE will run a senior strategic seminar for its top leaders in Israel in July -- part of the curriculum will be goals and part strategic planning. Issues of how we can help them further are under discussion, including possible assistance in creating a Torah u'Mesorah TEI.

H. Indicators/Evaluation Institute (Ellen Goldring)

The Evaluation Institute will probably be deferred from 1998 into the future so that information and resources can be gathered on instruments and conceptions of outcomes needed for that work. It has been suggested that papers be commissioned to review ideas about such areas as Jewish identity and its measurement, Jewish literacy, and the other areas in the indicators list which need further work.

I. Economics of Jewish Education (Karen Barth and Nellie Harris – Exhibit 16)

A project on the economics of Jewish education is under the direction of KAB, Nellie and includes Hank Levin. The plan is to establish a think tank on the subject, locate a project manager, and seek funding for the project. A first meeting of the think tank will be held in April. Barry suggested that a person from the Jewish education world should be included in the think tank.

Cippi distributed a publication list for Nessa. (Exhibit 17). We also looked at a copy of a pre-press version of the new CIJE brochure. It was distributed for final comments.

J. CFWW (Karen Barth – Exhibit 18)

CFWW start-up activities were described by KAB. The project will consist of a quality-controlled network of consultants who can work with clients in the field of Jewish education. To help get this project underway, a consultant will be hired. The project needs an articulation of the school of thought. In addition to some members of the professors group, about 5-7 people will join the network initially.

It was suggested we should start thinking about a library of materials needed for JEWEL and other projects.

It was suggested that a web site be developed for CIJE.

At the end of the session, KAB listed some of the possible projects that might be in the 1999 work plan. (See Exhibit 5.) These will be discussed at the next retreat. There was some discussion of the dates for the April and August retreats. August dates will be reconsidered as EG is not available, and perhaps the April retreat will be extended by one day to include a day on Forum planning.

**STAFF RETREAT
EXHIBITS**

AMERICAN JEWISH
ARCHIVES

FEBRUARY 4 & 5, 1998



Exhibit 1

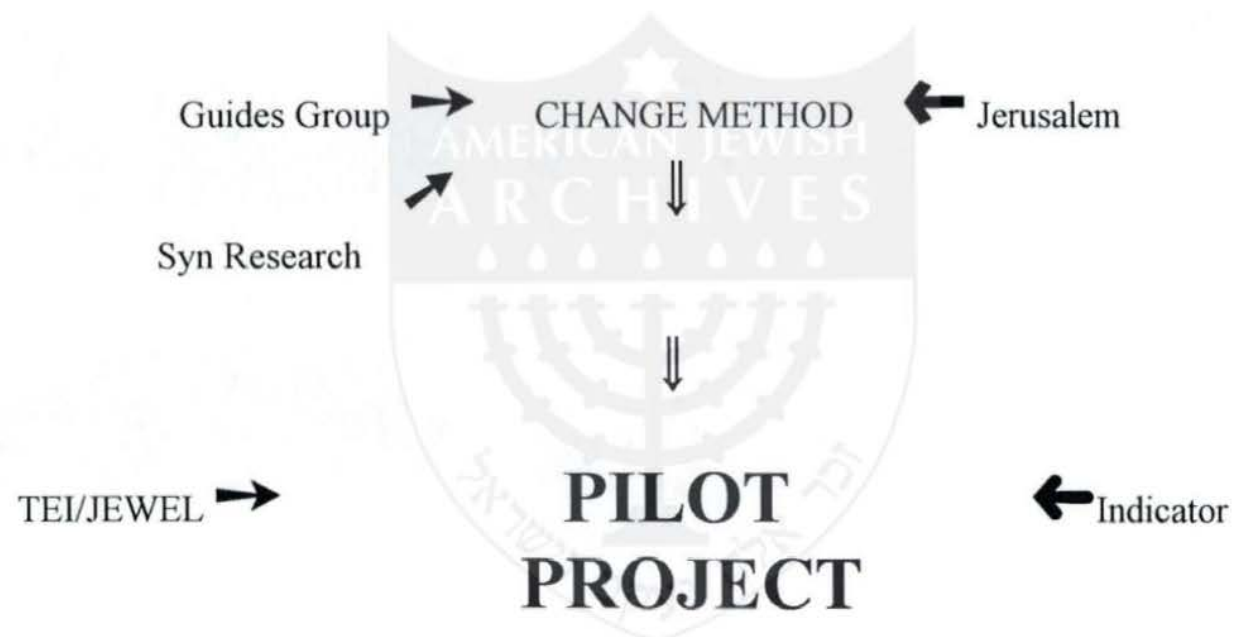


Exhibit 2



Exhibit 3

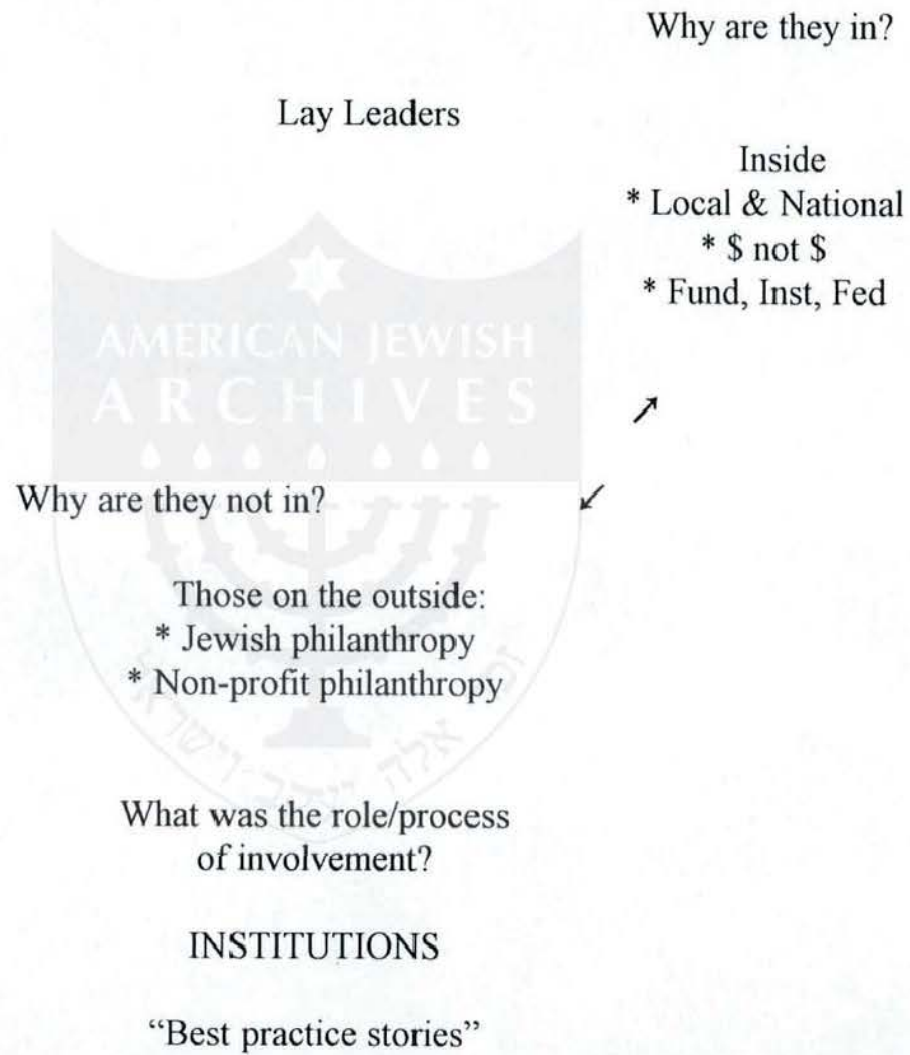


Exhibit 4

	COORDINATOR	DATA	SPEAKERS	TEXT	CASES
INSTITUTIONS <ul style="list-style-type: none"> Teaching & Learning Institutional Δ <ul style="list-style-type: none"> Goals Communal 		Lisa Malik DNP			
ECONOMICS		Hank Levin			
LEADERSHIP <ul style="list-style-type: none"> Lay Professional 		Pearl Beck Kegan			
MEASURING SUCCESS					
OVERALL PLENARY	NR				

POSSIBLE 1999 PROJECTS -- Exhibit 5

FORUM

JEWEL PILOT
JEWEL PLANNING
LONG TERM LAY LEADER'S PGM
EVALUATION INST.
FOUNDATION PROFESSIONALS GROUP

SYN CHANGE PROJECT (Field Sites)
GOALS PILOT

EARLY CHILDHOOD
RABBINIC EDUCATION POLICY BRIEF
CFWW CONF
ECONOMICS OF JEWISH EDUCATION
CASE WRITING/ESSAYS → JEWEL
CIJE LIBRARY/WEB SITE
TEI PILOT
EDUC. LEADERSHIP EDUC. CONFERENCE



CJIE Synagogue Change Research Project:
Summary for CJIE Staff Retreat: February 4 & 5, 1998

I. Background

II. Proposed Research Questions (based on 1/5/98 consultation)

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

2) HOW HAS THE PROCESS OF CHANGE UNFOLDED IN SYNAGOGUES THAT ARE INVOLVED IN PLANNED CHANGE PROJECTS?

(perceived outcomes of these synagogue change projects in terms of process implementation and impact)

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

III. Unit of Analysis (based on 1/5/98 consultation)

IV. Proposed Research Design & Methodology (based on 1/5/98 consultation)

A) Proposed methods for research question #1 (map of landscape):

- a) Interviews with project leaders
- b) Analysis of written documents

B) Proposed methods for research question #2 (perceived outcomes):

- a) Interviews with project leaders, synagogue leaders and congregants
- b) Analysis of existing data
- c) "Conversations"

C) Proposed methods for research question #3 (factors associated with success):

- a) Survey of the relevant existing research and literature
- b) Interviews with project leaders, synagogue leaders and congregants
- c) Analysis of existing data
- d) "Conversations"
- e) Synagogue-level field research:
 - Case-studies and/or site visits
 - Interviews, observations, and focus groups
 - Focus on exploring certain factors that emerge from "conversations"

V. Proposed Timeline (Karen)

VI. Issues and Questions for Discussion

.....Synagogue Change Research Summary & Discussion (for 2/98 CIJE Staff Retreat)

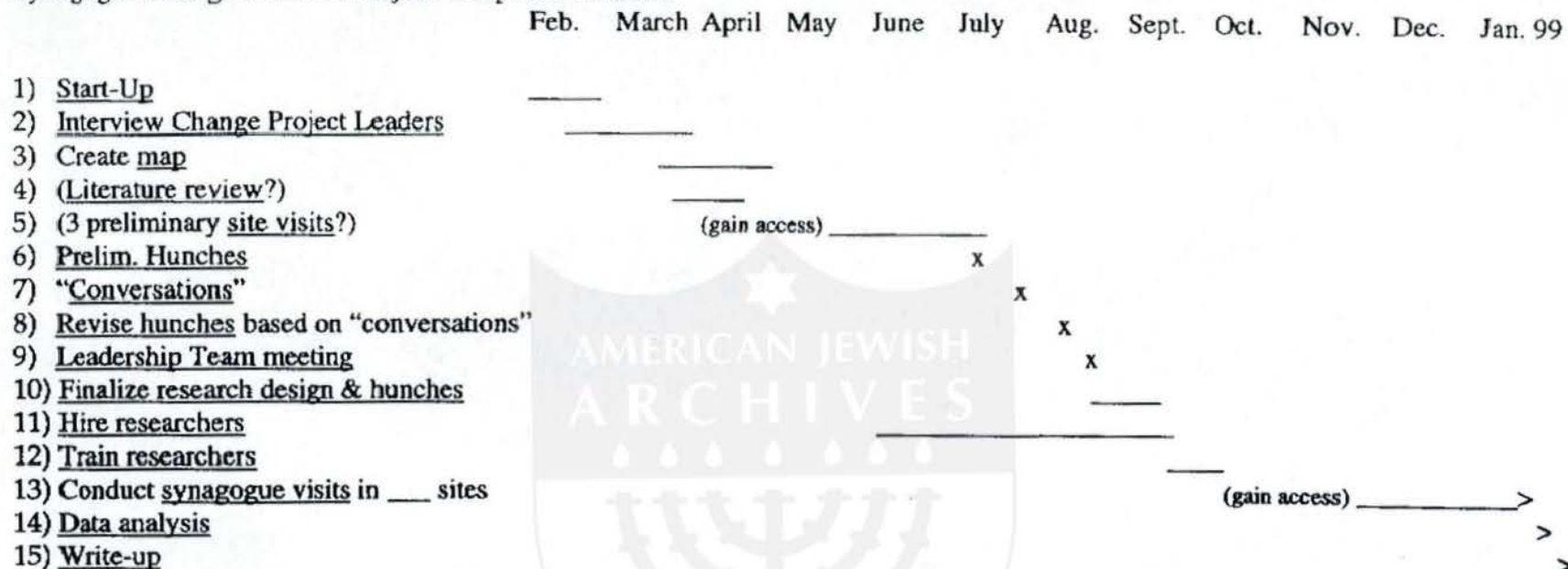
VI. Issues & Questions for Discussion

- A) Fit between proposed research design and research questions
- B) What type of research do we want to conduct?
 - inductive or deductive study?
 - hypotheses or hunches?
 - definition of research:
 - market research & "soak and poke" or academic research?
 - scope of research: # of participants, # of synagogues
- C) Feasibility & tradeoffs of proposed research methods
- D) Purpose & timing of "conversations", Leadership Team meetings, & prelim. site visits
- E) Political considerations
 - not an evaluation
 - using (or not using) existing data and evaluations collected by project leaders
 - gaining access to synagogues, given some opinions that additional synagogue research is unnecessary
 - CIJE's involvement in the 'synagogue change business' despite some potential opposition by existing change project leaders
- F) Putting all change projects under one umbrella:
 - Is there sufficient similarity between change projects to justify studying them together?

Synagogue Change Research Project: Proposed Steps

- 1) Start-Up: research questions; budget; research design; interview schedules
- 2) Meet & interview Leadership Team/Change Project Leaders
- 3) Create map
- 4) (Literature review?)
- 5) (3 preliminary site visits?)
- 6) Develop list of hunches (based on lit. review, prelim. site visits, & experience)
- 7) "Conversations" w. reflective participants: react to our hunches; more hunches
- 8) Revise hunches based on "conversations"
- 9) Leadership Team meeting: hunches; sampling, site selection, conceptual framework
- 10) Finalize research design, hunches, & conceptual framework, based on Leadership Team input
- 11) Hire researchers for synagogue-level research
- 12) Train researchers
- 13) Conduct synagogue visits in ____ sites
- 14) Data analysis: individual cases & cross-case analysis
- 15) Write-up of research

Synagogue Change Research Project: Proposed Timeline



**MOVING FORWARD WITH
THE CREATION
OF A NATIONAL CENTER FOR
JEWISH EDUCATIONAL LEADERSHIP
(JEWEL) VES**

The Basic Concept & Workplan

January 1998

JEWEL: THE NEED

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

PROFESSIONAL

- Almost no opportunities for in-service development
- Preservice programs prepare too few leaders to meet demand
- No programs for people changing careers
- Few programs address the skills needed for leading transformative change in institutions

LAY

- No programs focus on lay leadership for Jewish education development
- No organized effort to recruit lay people into the field

JEWEL OVERVIEW

PURPOSE

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

CONCEPT

An organization with three closely linked functions

- Recruitment and placement
- Preparation and development
- Plan for personnel needs

Target groups include:

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

POSSIBLE JEWEL ACTIVITIES FOR LAY AND PROFESSIONAL LEADERS

Recruitment and Placement

- Matching searches
- Databases, web sites
- Career counseling and planning

Leadership Preparation & Development

- Long Term Programs
- Fast Track Fellows Program
- Conferences & Retreats
- Alumni Networking
- Institutional Programs

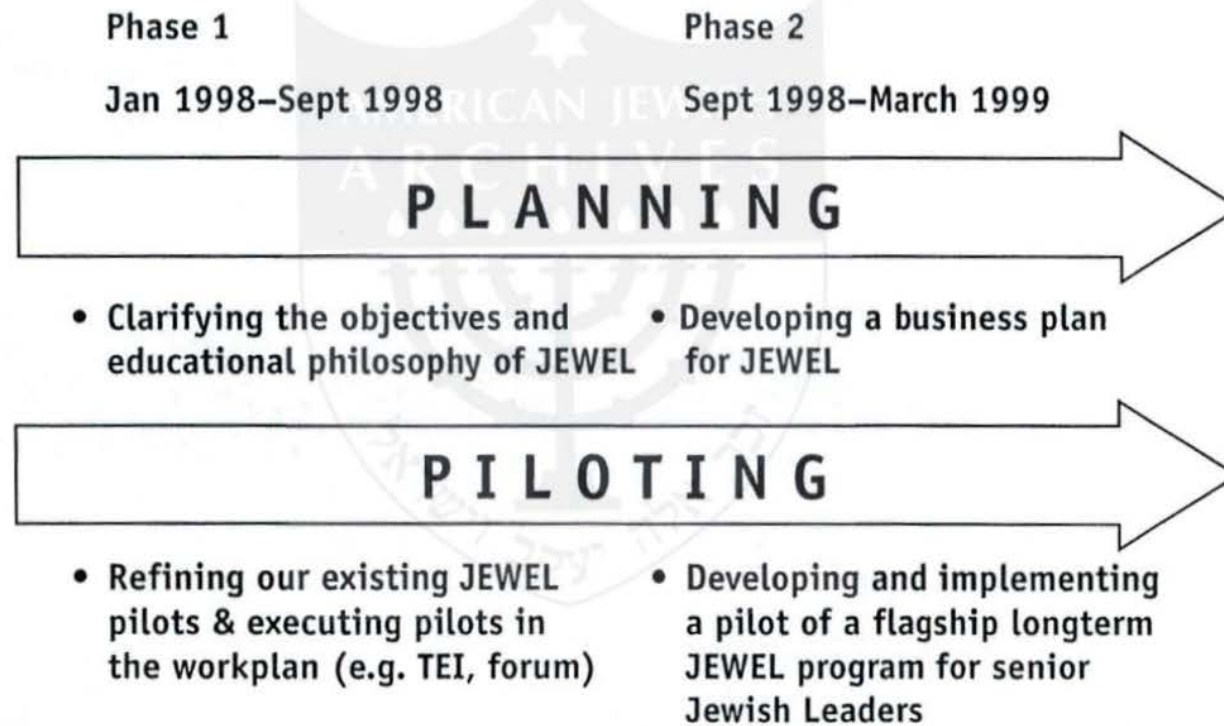
Personnel Planning

- Community/institutional consultations
- Conferences

EXAMPLES OF POSSIBLE JEWEL PROGRAMS FOR PREPARATION & DEVELOPMENT OF LEADERS

	LAY	PROFESSIONAL
Long Term Programs	<ul style="list-style-type: none"> • Community-based senior leaders program of studies & mentoring 	<ul style="list-style-type: none"> • Mid-Career people; 2–3 year JEWEL flagship program • TEI • Principals Center
Fast Track Fellows Program	<ul style="list-style-type: none"> • Program to bring Lay People into Jewish Education 	<ul style="list-style-type: none"> • Program to bring people into Jewish education from other fields
Conferences & Retreats	<ul style="list-style-type: none"> • Forum 	<ul style="list-style-type: none"> • Rabbinic Education Conference
Alumni Networking	<ul style="list-style-type: none"> • Lay Graduates Network 	<ul style="list-style-type: none"> • TEI Network • Principals Network
Institutional Programs	<ul style="list-style-type: none"> • Separately or jointly with professionals, content-oriented programs to train & energize organizational leaders 	<ul style="list-style-type: none"> • Programs for developing senior leaders at various organizations (e.g. JCCA, Hillel)

SUMMARY OF JEWEL PLANNING PROCESS



PHASE 1 PLANNING ACTIVITIES

TIMING

1/98-9/98

OBJECTIVE

Clarify the objectives, educational philosophy of JEWEL

KEY ISSUES

- What is our vision of a Jewish educational leader?
- What does an educational leader need to know and be able to do?
- What is our basic philosophy of how leaders are developed?
- How should JEWEL contribute to the development of leaders?

ACTIVITIES

Data Gathering

- Work with CAPE
- Scan various domains
- Examine needs of field
- Visit best practice sites
- Review feedback from pilots

END PRODUCTS

A concept paper describing JEWEL

PHASE II PLANNING ACTIVITIES

TIMING

6/98-12/98

OBJECTIVE

Address the practical issues of creating JEWEL as an institution

KEY ISSUES

- Where will JEWEL programs take place?
- How will faculty be recruited?
- How will we build community support and ownership for JEWEL?
- How will it be funded?

ACTIVITIES

Data Gathering

- Review various instructional models
- Review economics
- Review community organization approaches

Meet with prospective funders

Develop institutional plan

- Prioritize and phase in various aspects

Develop budgets and implementation plan

END PRODUCTS

A business plan for JEWEL

PHASE I PILOTING ACTIVITIES: CURRENT PILOTS ON THE WORKPLAN

PROFESSIONAL

- TEI
- Community Day High School Leaders
- Conference on Rabbinic Education
- Evaluation Institute

LAY & PROFESSIONAL

- Forum
- TEI Cohort 3



PHASE II PILOTING ACTIVITIES - DEVELOPMENT OF PROFESSIONAL PILOT FLAGSHIP PROGRAM

DEVELOP A LONG TERM PROGRAM FOR SENIOR LEADERS THAT MIGHT LOOK LIKE:

- Two year program for senior educators
- 4 day session each month beginning winter '99
- 1st summer - two week seminar
- 2nd summer - two week seminar in Israel (to be planned in cooperation with CAPE)
- Mentored internships
- Internet connections and assignments between monthly seminars

KEY ACTIVITIES IN DEVELOPING THE PILOT

- Select target audience for pilot
- Develop concept and curriculum
- Recruit faculty
- Recruit participants
- Develop feedback and evaluation plan

JEWEL Planning:
Template of questions for:
SCAN OF COMMUNITY NEEDS ASSESSMENT

Need to Probe for both Lay and Professional
Need to Probe for Institutional, Communal, and National Levels
Need to Help Think Beyond Current Positions

CURRENT TRENDS

Collect data about numbers and categories of leadership positions in Jewish education in various settings within communities (geographical) and nationally—lay and professional

What positions in Jewish education have traditionally been hard to fill (open for more than a year, or high turnover?) Probe as to why? What means have been taken to rectify this situation.

What are the leadership needs in your community in terms of skills, knowledge and dispositions of leaders? Do these differ by setting, institution, etc?

How would you describe the personnel situation in your institution/community? What would it have looked like five years ago? What new positions have been created/developed in the past five years? (SAME FOR LAY)

What are the "career tracks" for lay and professionals in your institution/community?

Describe the inservice, staff development and leadership training programs and opportunities you know about, take advantage of? Assessment of these?

Have you brought in consultants and outside experts or utilized internal human resources? Which outside programs, conferences, experiences have your staff and lay leaders been involved in? Probe assessment of these.

What would you consider to be exemplary—successful leadership development programs? Probe as to why they are exemplary.

How have you funded training and development in your institution and community? What has been your training budget each year for the past few years? How much have you spent in each of the past five years? Do you anticipate this amount to grow, decrease or remain the same? Have you outside grants or funders for this or is it integral to your operating budget?

FUTURE TRENDS

How can we/will we think about leadership for the Jewish community in the future? What are your predictions for five years from now in terms of community projections for new positions or vacated positions? New institutions, programs?

Describe the inservice, staff development and leadership training programs and opportunities you would like to have available. What are the leadership needs that you perceive are lacking/needed in terms of skills, knowledge and dispositions?

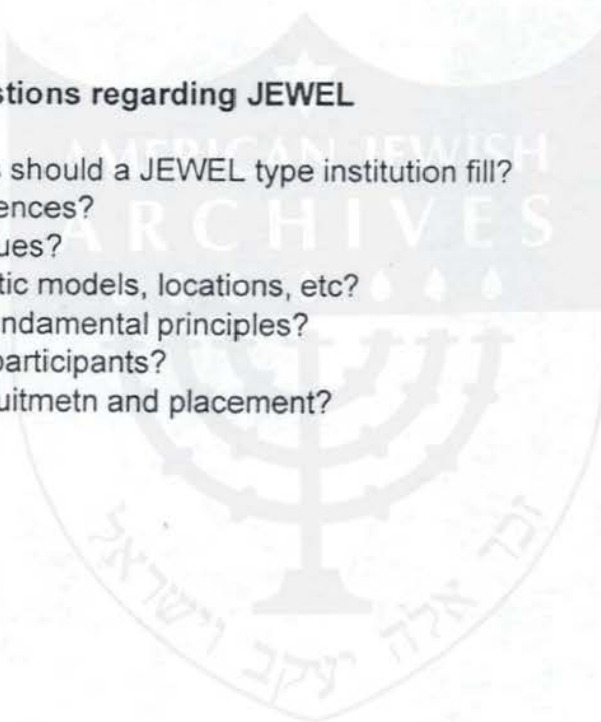
How can leadership development help meet various community goals and needs in the area of Jewish education?

JEWEL

A host of questions regarding JEWEL

Examples:

- What needs should a JEWEL type institution fill?
- Target audiences?
- Funding issues?
- Programmatic models, locations, etc?
- Important fundamental principles?
- Number of participants?
- Role of recruitment and placement?



JEWEL Planning: Template of Questions for Scans

I. Trends in Leadership/Preparation and Development

1. During the past five years, what have been the major trends and perspectives regarding leadership development and preparation in the field of >>>>>?

A. What have been the goals of these programs?
Probe about the conception of leadership. What are they?
training for?

B. Have there been any major shifts or changes in the field?

C. What have been the overarching paradigms/schools?
thoughts? (WHAT)

2. Today, what are the current perspectives regarding leadership development and preparation?

A. What are the goals of the programs? What are they?
'training' for?

B. What are the most prevalent programmatic models and
approaches? (HOW)?

C. What is the curriculum and teaching perspectives/methods?

D. Who are the participants of the programs and how are they?
recruited?

E. Are there other functions connected to the programs, such
as placement?

F. How does the field define "successful"?
programs/approaches? What does the field consider as a
successful development/preparation program?

II. Future Directions

3. Where do you see the field headed in the future?

III. Best Practices

4. In your opinion, what are three exemplary programs/places in the area of leadership development and preparation for the field of >>>>>?

(Get names, places, approaches, etc).

A. What is unique about them?

B. Why are they considered exemplary?

C. What is the budget for these programs, are they funded through program fees, grants, funders?

5. Who else should I contact and speak with regarding leadership preparation and development for the field of >>>>>?



CIJE STAFF RETREAT

I. JEWEL LONG-TERM PILOT FOR SENIOR EDUCATORS

1. Who should the target audience be?
 - A. "Stars"
 - B. Groups of educators from institutions
 - C. Community groups
 - D. Senior leaders by setting
2. Leading Jewishly: How do we develop a JEWEL School of Thought?
3. What is the Program Design of the pilot?

II. JEWEL PLANNING

1. Comments on the template for scans of various domains.
2. Comment on the template for community needs assessment.
3. Who will do the scans?

**CIJE Staff Retreat
February 4, 1998**

Leadership Forum

The Leadership Forum is intended to be a multi-day opportunity for a group of lay and professional leaders and future leaders for Jewish education to gather together in the spring of 1999. The goal is to discuss big ideas as well as to provide time for networking and the bubbling up of ideas to help develop a strategy for mobilizing leaders towards and for Jewish education. There is a committee in place made of up CIJE board members and staff with Chuck Ratner being the chair of the committee. Many of the CIJE board members and other known leaders in the field of Jewish education have been preliminarily interviewed to help ascertain content, direction and needs. This information has informed the committees conversations about target audience, size and content.

Potential topics could include:

- Economics of Jewish education,
- Lay/Professional Partnerships and Alliances,
- Lessons of History,
- Systemic Change Issues,
- Continuity of What?
- Missing Institutions?
- Communal Vision,
- Mobilizing National Support for Jewish education,
- Team Building

The target audience we want to attract:

- Lay and professional leaders regardless of position
 - Institution
 - Communal
 - National
- Selected communal leaders

Target size could be anywhere from 150-300 and will be clarified as we move forward.

Questions/Tasks:

- What will make this program different from others? What will the insides look like?
- How will we develop a list of invitees and then select a group of them for pre-interviewing and attendance encouragement
- Are we adequately staffed for the Forum?
- What should follow-up look like?

Lay Leadership Forum: Board Meeting Questions and Responses

1. What should be objectives for the Forum?

What would success look like?

- To create a national community of Jewish educational leaders
- To have a shared vocabulary
- To produce a product that is different
- To have great people and great content in attendance
- To identify younger leadership and get them involved
- Inspirational transmission
- Exposure to new/innovative ideas
- Request for additional "forums"
- For learning to take place
- To wrestle with ideas to get a deeper sense of what leadership does

2. Should this be a lay/professional conference?

- Combination of lay and professional
- This should focus on a "senior," "seasoned," attendee
- Lay and professionals of a very high caliber
- Great people

3. What should be our strategy for planning the Forum?

Who should be involved in the planning?

Who do we want to attend?

How will we motivate these people to attend?

Who are the partners we want to invite?

- Present success stories including the challenges and problems
- Prepare leaders to pass on knowledge
- Great people, opinion makers, senior, experienced, model leaders
- Use the Forum as a PR opportunity for CIJE
- Clearly articulated message we want participants to come away with
- Clear statement of purpose for the Forum
- Active press function, use this as a PR opportunity for CIJE
- Value in limiting attendance/As many as possible if they are the right people

4. What characteristics should this event have to impact lay leadership support and involvement in Jewish education?

Are there any models of conferences with these characteristics?

- Address the Jewish content question
- Leading Jewishly
- Opportunities for networking
- Serious approach and orientation
- Celebration of success balanced with revealing and discussion of tensions and problems
- Visible plan for what to do after the forum is over
- Creation of invitational lists
- Understanding of diversity in the field

5. Next Steps

- Select a chair
- Develop planning committee
- Individual conversations with board members to gather more thoughts and insight to help further craft the Forum

CIJE GUIDING PRINCIPLES
(Draft #1 - January 1998)

**IMPROVING JEWISH LIFE
THROUGH REVITALIZING
JEWISH EDUCATION**

- Continually define and refine a paradigm of Jewish education and of institutional change... "A school of thought" that is the foundation of our work
- Focus on leadership – lay and professional
- Actively promote planning, strategic thinking, evaluation and the development of vision-based organizations
- Take a multi-disciplinary approach to problem-solving, continually searching out and bringing together leading thinkers to help develop innovative approaches
- Work in partnership with existing organizations
- Move from data to policy to action with a commitment to intellectual honesty and rigor

**BUILDING CIJE AS
AN ORGANIZATION**

- Adhere to standards of professional and ethical practices based in Jewish text and tradition
- Conduct cost effective operation
- Maintain a ruthless focus on our mission
- Actively involve our lay leaders and funders in our work and fulfill our commitments to them
- Work in a team-based non-hierarchical manner
- Model excellence in organizational management
- Invest in the development of staff at all levels



Teacher Educator Institute

What would it take to transform the supplementary school into an institution where exciting learning takes place, where students are stimulated by what they encounter, and where a love of Jewish learning and commitment to Jewish living is the hallmark of the institution? CIJE believes--and current educational research confirms--that the heart of any transformation of an educational institution such as the supplementary school is linked to exciting, innovative teaching by knowledgeable and committed educators.

The CIJE Policy Brief, *Background and Professional Training of Teachers in Jewish Schools* (1994), shows that in supplementary schools, the teaching pool is committed and stable. However, only 13% of supplementary school teachers are formally prepared in both pedagogy and Judaica subject matter. Given the weak preparation and background of this teaching pool, in-service education becomes a crucial element in upgrading the profession. Yet CIJE research has shown that professional development for teachers tends to be infrequent, unsystematic, and not designed to meet teachers' needs.

What is required is a strategy that can capitalize on the commitment of teachers, redress the deficiencies in their preparation and background, and prepare them to engage children actively in meaningful encounters with the Jewish tradition. Old training models of professional development are simply not adequate for the scope of this task.

CIJE's Teacher Educator Institute (TEI) is a two-year program, partially funded by the Nathan Cummings Foundation, to create a national cadre of teacher educators. It focuses on the challenges of developing new approaches to issues of professional development for Jewish educators. The central goal of TEI is to develop leaders who can mobilize significant change in teaching and learning through improved and creative professional development for teachers in their institutions, in their communities, and on the national level. The core domains of study include: teaching and learning; Jewish content, including personal religious connection; knowledge of teachers as learners; professional development; and organizations/systems/the Jewish community. TEI graduates will be catalysts for change who are substantively grounded in ideas and concrete practices, and who also have a deep understanding of instructional improvement and educational change.

In order to create an experience that allows time for the development of and reflection about new ideas and practices, opportunities for experimentation, and feedback, TEI participants meet six times over the course of the two-year period. There are also assignments and follow-up work between group meetings. We are currently developing strategies for networking and supporting TEI graduates.

will take into account both the skills of the prospective participant as well as the context of the institution in which they work.

We will include actual training modules for lay leaders and rabbis from the settings where the TEI participants work. These lay leaders and rabbis will be invited to attend sessions specifically designed to motivate and involve them in the work of professional development for teachers. These sessions will be part of two of the six TEI seminars offered to cohort III.

We will create a new videotape and associated teaching materials addressing issues of mentoring. This will be an important enhancement to the curriculum of TEI which will be used to help both professional and lay leaders to understand the enormous potential of mentoring in changing the quality of what happens in the classroom.

The evaluation component of this work includes:

1. A survey of current professional development offerings in a sub-sample of communities participating in the Institute that describes in depth the nature and extent of those offerings for teachers in each community (including both communal and institutional offerings). The purpose of this document is to establish a baseline so that change can be assessed in the future.
2. An interview study of TEI participants' efforts to improve the quality of professional development opportunities in their communities.
3. A document or series of documents focusing on the same sub-sample of participating communities, evaluating changes in the structure and content of their communal and school professional development offerings. These reports will draw on interviews with participants and others from those communities as well as on observations of professional development activities in the communities.

In Fall 1997, an article describing the work of TEI was published in the *Peabody Journal of Education*:

Holtz, B.W., Dorph, G.Z., and Goldring, E. B. (1997). **Educational Leaders as Teacher Educators: The Teacher Educator Institute—A Case from Jewish Education.** *Peabody Journal of Education*, 72 (2), 147-166.

WHAT'S IN THIS GUIDE:

☞ About the CIJE Videotape Project

☞ Background Material of the Tapes

The Setting of the Classroom
Morah Junger's background
About the textbook
About Morah Junger's Lesson Plans and Worksheets
About the tapes
Content of Tapes

☞ Lesson Options for Professional Development Workshops

- Step I: Setting the Stage
Step II: Preparation for Investigating Videotape Materials: Creating a
 Conversation about Teaching and Learning and Observation
Step III: Suggestions for Framing Opportunities for the Second Viewing
 with a Focus on Teacher and Students
Step IV: Suggestions for Framing Opportunities for the Second Viewing
 with a Focus on Content

☞ Facilitator Evaluation

☞ Participant Evaluation

RABBINIC EDUCATION CONFERENCE

What is it:

A conference that will bring together the leaders of the world's Rabbinic Seminaries (probably primarily the non-orthodox ones) to discuss the challenges of Rabbinic education. We will give them an opportunity to

- Step back from day-to-day issues and think about the bigger questions
- Be exposed to new ideas from other fields
- Share ideas with each other

We will use this as an opportunity to raise questions about the role of the Rabbi as an educational leader.

This is JEWEL pilot that will give us a chance to experiment with the creation of development opportunities for very senior leaders in Jewish education.

How will we get it done

The team will include PCH, DNP and KAB. KAB is leading the project

We will hold a planning meeting, probably in the late Spring to which we will invite one person from each Seminary.

We will need a long staff meeting to discuss the insides of this

We will need to interview the attendees to the planning meeting ahead of the meeting

Ideas about content (very preliminary)

- Jewish study
- Recruiting
- Mentoring
- Building an environment conducive to spiritual growth
- Integrating Jewish learning with the learning of how to bring this material to others
- Adult learning theory and the implications for pedagogical approaches
- Attributes (Alverno College)
- New Rabbinic roles and the implications for training
- Synagogue Change

Immediate Issues

- Who gets invited?
- How to structure the planning meeting?
- How, if at all, to involve lay leaders in the planning and in the meeting?
- Who will do the interviews?

JTS RABBINICAL SCHOOL

We have presented a proposal to the lay and professional leadership of JTS to help them think about their vision for Rabbinic education. The team will be KAB and DNP.

We proposed to charge a significant fee for this work. They are in the process of deciding whether they want to do it.

One of the challenges here is the issues of confidentiality



STRATEGIC PLANNING PROPOSAL

THE JEWISH THEOLOGICAL SEMINARY OF AMERICA

RABBINICAL SCHOOL

The JTS Rabbinical School has a long and distinguished history. Many great thinkers have left their imprint on the design of the program and on the atmosphere of the institution. Many of our nations most successful Rabbis began their careers as students at the Seminary and can give credit to the program for helping to shape them as rabbis and as human beings. It is a tribute to the institution itself that it has maintained a commitment to quality and a sense of focus throughout the many societal upheavals that have taken in its hundred year history.

As JTS looks to the future and begins to think about the training of rabbis for the decades ahead, there is a growing sense among the leaders of the institution (both lay and professional), that it may be time to step back and engage in an intensive review of the underlying assumptions upon which the program is based.

The role of the rabbi is changing in America. Within synagogues, rabbis are taking on new responsibilities. In addition to crafting and leading services, writing and delivering sermons, counseling congregants, working on social problems in their communities and conducting life cycle events, rabbis are increasingly finding themselves in new roles: change agent, outreach worker, to name a few. Even the old roles are fraught with new challenges that are only beginning to emerge today, and will likely grow in the coming decades. In addition, rabbis are increasingly following career paths that take them, either temporarily or permanently outside of the congregational setting. These careers have their own issues and opportunities for which Rabbis need to be prepared.

It is against this backdrop that JTS is considering undertaking a serious process of reflection and planning to address the following issues:

- 1) What careers will rabbis enter in the future and what will be their primary roles within these settings?
- 2) What should a rabbi know and be able to do to succeed in these roles and what personal attributes and character traits does he/she need?
- 3) What are the implications of the above for design of a Rabbinical program
 - Recruiting
 - Curriculum
 - Pedagogical approach
 - Learning environment (formal and informal)
 - Mentoring and field work
 - Faculty recruiting and training

4) What are the implementation challenges of moving in this direction

- Leadership
- Staffing
- Funding
- Space
- Other

This proposal outlines a process to address these issues and is divided in to three parts: 1) the proposed planning process; 2) internal staffing; 3) proposed consulting resources.

Proposed planning process

The planning process is divided into three phases (see exhibit 1) designed to bring in ideas from outside of JTS while at the same time providing a process of intensive internal reflection and deliberation.

Phase one would be the research phase. It would include an external scan which would involve interviews with leadership in the primary settings where rabbis are likely to work in the future. Interviewees could include the lay and professional leaders of agencies like Hillel, JESNA, United Synagogue of America, social service agencies, social action programs, chaplancy programs as well as leading, practicing Rabbis in various fields. The interviews would focus on the future, on understanding the trends and how the nature of the work is changing.

Simultaneously, there would be a process of reflection and deliberation upon which later work could be based. To stimulate this process, 6-8 papers would be commissioned, reflecting different views of what a rabbi needs to know and be able to do. At least two of these papers should be written by people who are knowledgeable about the history of the Seminary and aware of past debates about the nature of rabbinic education.

During phase one there would be several meetings and at least one three-day retreat to engage in discussion and reflection on the materials generated to-date. The objective would be to begin to articulate the JTS vision of the rabbi of the future.

The goal of **phase two** would be to articulate a vision of a rabbinical school program that is built around the vision of a rabbi defined during phase one. There would be series of shorter meetings at which outsiders representing various educational approaches would be brought in to stimulate the thinking of the team. These outsiders would include leading thinkers on leadership development from other fields including business, government, education, other religious traditions.

The end product of phase two would be an articulated vision of the program and a discussion of changes that would be needed to begin to move toward that vision.

The goal of **phase three** would be to develop an implementation plan that would address the practical problems of moving toward the vision. This would be done through a series of meetings with a smaller, mostly internal group that would systematically develop specific action initiatives in keeping with the overall vision.

During each of these phases there would be opportunities for gaining input from the larger JTS community and for sharing the thinking to-date.

The entire process would take approximately one year. With the first phase lasting up to six months and the second and third phases lasting for three months each.

Proposed staffing

The internal staffing of the project would consist of three different groups:

- 1) A **visioning team** consisting of a broadly representative group of 15-20 members of faculty, administrators, practicing rabbis and lay leaders. This group would include authors of the papers to be written in phase one.
- 2) A **planning team** consisting of a subgroup of the larger group. This group would be a more manageable size to promote more timely consensus-building. This group would be responsible for outlining the vision of the program in phase two.
- 3) A **core team** consisting of a small group of faculty/administrators and lay leaders. This group would run the project and deal with the interface with the overall JTS institution-wide strategic planning process that is moving forward concurrently. It would also be responsible for designing the implementation plan in phase 3.

An internal project manager would need to be designated and at least two other JTS faculty/administrators would need to be prepared to devote significant time to the project.

Proposed consulting team

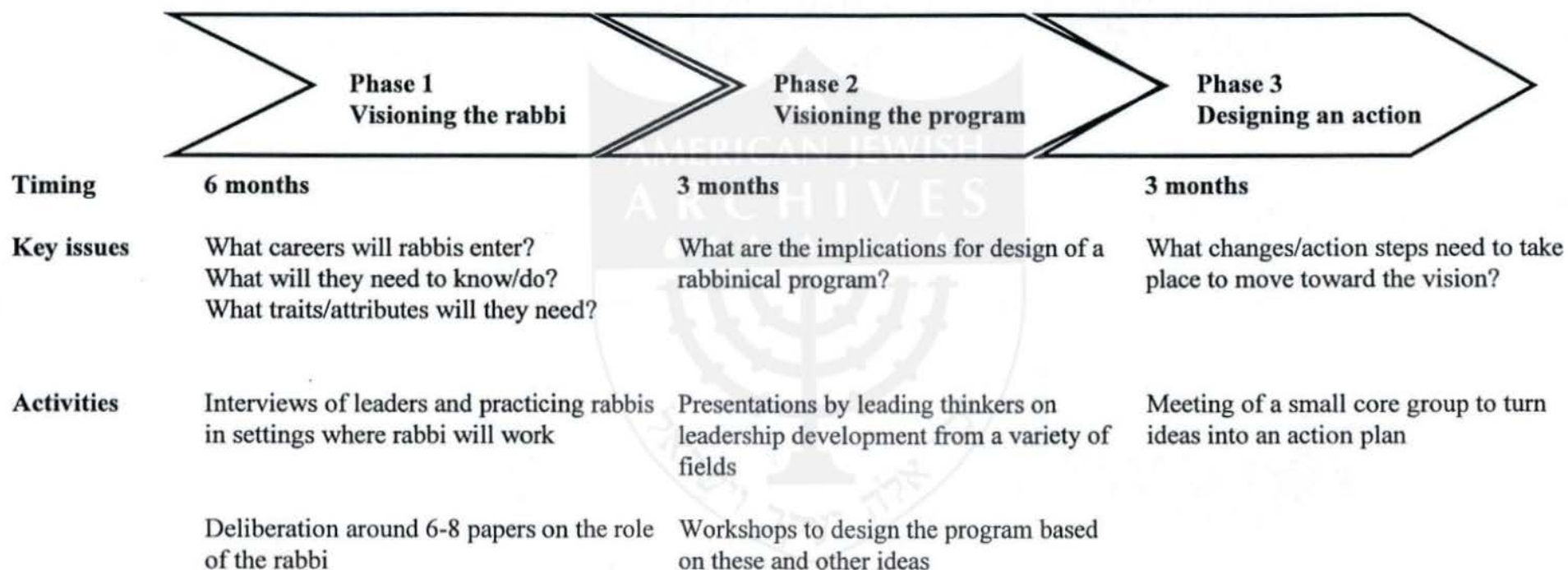
Because of the broad scope of this project, you are considering bringing in some outside consulting resources. An outside consulting team would help insure that the work moves forward on a timely basis and that the process itself is well managed. The presence of objective outsiders is also a way of stepping back from the inevitable internal "politics" and opening up the process to new ideas and approaches.

The consulting team for the project would include three different resource people:

- 1) An experienced management consultant who will conduct the external interviews, facilitate meetings and help summarize the results of the work in writing. To be filled in.

(Exhibit 1)

PROJECT APPROACH



TORAH UMESORAH CONSULTATION—June 19, 1996

Present: Deborah Ball, Dovid Bernstein, Gail Dorph, Sharon Feiman-Nemser, Chaim Feuerman, (second half), Joshua Fishman, Alan Hoffmann, Barry Holtz, Yitzchok Merkin, Moshe Possick

When we concluded our April meeting, there were seven suggestions for how Torah U'Mesorah might cut into the arena of professional development for teachers within the movement. The purpose of this meeting was to take two of those suggestions and think together about what would it take to design and implement such interventions and what might be the pros and cons of doing so. The two suggested options that the Torah U'Mesorah leadership team decided to address in this meeting were:

- I. Create a cadre of master teachers
- II. Create intensive professional development opportunities/climate in several institutions

We spent the first part of our meeting addressing similar questions with regard to both of these options. The short-hand list of issues raised follows:

I. Create a cadre of master teachers

What would be the goals of such an initiative?

- a) Superb teacher who can articulate his practice
- b) Staff developers who can help others in their own institutions.
- c) Some would be able to do teacher training beyond their own institution
- d) *Mentoring* another colleague within the same institution
- e) Have an influence on their own work and on young teachers
 - >to "add" to their practice
 - >to create a common language
- f) Teachers will "carry" common practice

What are the recruitment issues we would need to address?

(Who is the target population for this initiative?)

- successful and experienced teachers
- identified by their reputation with three key constituent groups:
 - parents
 - children
 - principal
- * innovative
- motivates students
- kids happy

What questions do we have about taking this approach?

(What are the assumptions that suggest that this is a good idea?)

- Is "master teacher" as an approach a way to address these goals? What are impediments to strategy?
- What are other "enabling conditions" in order to do this work? Principal? Team of teachers from institution?
- What does it mean for teachers to have a common language?

- a) curriculum—teaching and learning
- b) children's needs [lower end, special needs] will be met
- c) focused on needs of children by teachers

What are the advantages of this approach to the issue?

- have a model of a school that has transformed teaching and learning/process of teacher renewal product
- teachers have community of colleagues
- school may produce leaders
- improvement may transcend staff
- turnover "issue"
- kids will have a better learning experience
- "way station" on the way to becoming a PDS (professional development school)
- innovative, experienced teaching methods can be tried here
- would have to address resistance of "old dogs" - *vatikim*

What are the disadvantages or impediments?

- teachers will view "self" as blame for problems of system
- school community may not support or understand effort
- may not be able to lead this process in an effective way
- no shared vision of what we should be working on
- what impact will it have on the "whole" system?
- need to deal with resistance of veterans
- responsibility for whole system
- limited "control" of outside catalyst

We then talked about which of these two approaches made the most sense given the givens of the Torah Umesorah movement. Which initiative would have a bigger impact on the system? There was a tilt toward thinking that the school reform initiative had more possibilities within the Givens of the realities now faced.

We asked if there were any examples of successful school reform efforts within Torah U'Mesorah schools.

We heard Chaim Feuerman describe what it took to transform his school. From his description, the group focused on some of the features of this particular design for school transformation which had as its focus professional development of teachers.

Elements of design of the transformation of the Westchester Day School

- ▶ leader with vision (focused, substantive agenda)
- ▶ in-house leader
- ▶ weekly pro development time
(Teachers shared and critiqued each others lessons, Rabbi feuerman's-lesson was the first one shared in this way)
- ▶ interesting leadership strategy
- ▶ multiple entry points
- ▶ complex top down – bottom up process
- ▶ range of resources —> tapes, hear peers talk, reading, see the model
- ▶ receptivity to change

ECONOMICS OF JEWISH EDUCATION

	1	2	3	4	5	6	7	8	9	10	11	12	
Contact "Think Tank" members – organize first meeting	X												NH
Find someone to gather existing research	X												NH
Make arrangements with Hank Levin – Tell him about NH	X												KAB
Find a research project manager (with his help)			X		X								NH/ HL
Find a funder – some lay people		X		X									KAB
Organize first meeting		X		(X)									NH
Write a preliminary paper		Draft X		Complete X									HL
Kick off the project – June meeting							(X)						NH

(X) Meeting

1/30/98

Dear Colleagues:

Please let Cippi know if, in the course of the staff retreat, you foresee other publications or documents that may require editorial input.

Nessa

Publications Scheduled for 1998

The CIJE Brochure

The CIJE Strategic Plan (a version for the public)

The Teachers Report: A Portrait of Teachers in Jewish Schools

The Leaders Report (designed to match *The Teachers Report* but not copied rather than printed)

Study Guide for Transforming the Aleph by Arthur Green

Policy Brief: The Professional Development of Teachers

Other Possible 1998 Documents

Research:

Change

Synagogue change

Lay leadership

Educated Jew/Goals:

Beit Rabban Portrait

Agnon Portrait

CFWW

The Concept

A quality-controlled network of consultants who practice and help refine a “school of thought” in both consulting and education. CIJE’s role will be to assemble consulting teams, provide tools and methodologies, run conferences for consultants and organize a peer review process.

Next Steps

1. Hire a consultant
2. Look for a director
3. Look for funders
4. Articulate our “school of thought”
5. Develop detailed plan

Key Issues

1. Who are target groups?
2. What areas of consulting?
3. How to find the consultants?
4. How to motivate them to join?
5. How to bring them into our school of thought?
6. How to ensure quality control?
7. How to say no to people who want to join?
8. How to get rid of people who are not doing good work?
9. How to kick off the network? A conference?
10. Whether to invite the initial members of the network into the process of designing it?
11. Should there be financial subsidies?

Staff Retreat
February, 1998

THE JEWISH INDICATORS PROJECT

A. What is the project?

The Indicators Project is an attempt to establish an indicators system for Jewish education and Jewish life in North America. The purpose of the project is to assess our current standing and monitor progress towards CIJE's vision of a thriving Jewish community. Since Jewish education is both a key element in the vision, and the principal strategy for achieving that vision, the indicators system will concentrate on aspects of Jewish education. It will also include aspects of Jewish life more generally, as outcomes of education and as a reflection of CIJE's larger vision. The Indicators Project will also help galvanize attention and mobilize support for Jewish education, and provide a coordinated strategy for assessing whether the wide range of initiatives in Jewish education and communal life are helping us move in the right direction, broadly speaking.

B. Activities for 1998

The project is still in the planning phase so activities are still in flux, depending on decisions to be reached at key junctures. At this time, the following activities are anticipated:

ACTIVITY -- PERSON(S) -- DATE

1. Revise project description -- KAB, AG -- February

Based on feedback from the board meeting, the project description needs to be revised. The question of how to incorporate outcomes needs to be addressed. A version for community leaders also needs to be written, not sure if this is that version or if yet another will be required.)

2. Explore Jewish communal and national data -- BR -- February-March

Beginning with a list of suggested names, find out what communal and national Jewish data may be available to incorporate in our indicators system.

3. Explore ABData on Jewish communities -- SMC -- ??

Steve Cohen suggested that ABData maintains a data set on Jewish communities. He has offered to explore this on our behalf.

4. Prepare a template for indicators from secular national data ~~66~~ BR, AG-- February
Provide a sense of what the secular national data might reveal, and how it
might be displayed, so a decision can be reached on whether to purchase
equipment that would allow analysis of the actual data.

5. Analyze secular national data and provide indicator results -- BR, AG,
EG -- March-June
Subject to approval following activity #4.

6. Consult with community leaders -- ~~BA~~, KAB, EG, PCH -- May??
Find out whether leaders from key communities (SMC suggested Cleveland,
Boston, and New York) would support the indicators project, and what advice
for the project they have.

7. Establish a coordinated CIJE plan for input into the NJPS 2000 -- KAB, AG, EG --
spring

We need to figure out what, exactly, we would like to see in the next NJPS.
Then we need to strategize on the best way to get that implemented.

8. Use CIJE educators data to prepare model indicator reports -- BR, AG, EG
-- ??

Subject to approval, we could use the CIJE educators data as well as
similar data from Seattle, Cleveland, etc. to provide baseline indicators
data on several of our key aspects of Jewish education.

C. Key questions that need to be resolved

1. How will we incorporate outcomes (e.g., participation, literacy,
identity) into the indicators system? Conceptually, do we have a consensus
that the outcomes are essential, but should be part of the education
indicators and not separate indicators of Jewish life? Board members were
uneasy with proclaiming our grand vision through the Indicators Project,
but also uneasy with ignoring the outcomes question. We need to resolve
this problem. Current plan: KAB is taking another shot at drafting the
project description.

2. What is the balance of community vs. national data that we will use for
the indicators system? Some board members suggested using national data
for outcomes, local data for characteristics of the education system. We
are discovering that national data exists for some education
characteristics also. We have yet to fully explore existing community data
sets, and we need to think more about community data collections.

3. How will we obtain community buy-in for the project? This is essential
for both obtaining indicators data, for having an important impact, and

ultimately for financially supporting the project. Current plan: Convene a consultation with planners/research directors from key communities.



Wednesday Evening
February 4, 1998 Staff Retreat
Professors Update

PROFESSORS GROUP

As of February 3, 1998

Deborah Ball
Dan Chazan
Richard Cohen
Sharon Feiman-Nemser
Walter Feinberg
Bill Firestone
Adam Gamoran
Ellen Goldring
Pam Grossman
Marvin Hoffman
Fran Jacobs
Debbie Kerdeman
Hank Levin
Mike Milstein
Barbara Neufeld
Gil Noam
Danny Pekarsky
David Purpel
Anna Richert
Barbara Schneider
Susan Stodolsky
Sam Wineburg
Ken Zeichner

Barry Holtz



Questions for Discussion

- 1) Numbers? Do we need to expand the group? How? In what areas?
- 2) When do people get taken off the group (e.g. Gil Noam)?
- 3) How crucial are the whole-group meetings? What about private “tutoring”?
- 4) What is the right “curriculum” for the Group? (Judaica; Jewish education)
- 5) What is the relationship between the Professors Group and the CFWW?
- 6) Individuals professors and specific projects—matchups and questions.

