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Minutes, correspondence, and notes. Synagogue Change
Research project planning and drafts [Lisa Malik]. Lay Leadership
project planning and drafts, 1998-1999.

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February 18, 1998

Dr. Adam Gamoran
Mandel Institute
P.O.B. 4556
Jerusalem 91044 Israel

Dear Adam:

Thank you for your participation in the Synagogue Change Research Consultation in New York on December 24th. The stimulating and exciting discussions about CIJE's Synagogue Change Research Project have helped us enormously to refine the approach to our work. Your input has helped us to understand, in a much deeper way, some of the potential challenges and pitfalls of the project. We are currently in the process of weighing the tradeoffs of the different methodological approaches that were discussed at the research consultations.

Enclosed are the notes from the December 24, 1997 and January 5, 1998 meetings for your reference.

Thank you for taking the time to join us. We look forward to working together in the future.

Sincerely,

Karen A. Barth
Executive Director

Dr. Lisa S. Malik
Senior Researcher and Manager
of the Synagogue Change Research Project

Cc: Isa Aron, Adrienne Bank, Pearl Beck, Steven Cohen, Adam Gamoran, Ellen Goldring, Cippi Harte, Sam Heilman, Larry Hoffman, Barry Holtz, Carolyn Keller, Barry Kosmin, Jack Kugelmass, Daniel Margolis, Daniel Pekarsky, Riv- Ellen Prell, Joseph Reimer, Susan Shevitz, Barry Shrage, Susan Stodolsky, Linda Thal, Rob Waitman, Ron Wolfson, Jonathan Woocher

Notes from CIJE Synagogue Change Research Consultation 12/24/97

Participants:

Karen Barth-CIJE
Steven Cohen-Hebrew University
Adam Gamoran-University of Wisconsin, CIJE
Ellen Goldring-Vanderbilt University, CIJE
Cippi Harte-CIJE
Sam Heilman-Queens College
Barry Kosmin-Institute for Jewish Policy Research
Lisa Malik-CIJE
Susan Shevitz-Brandeis University
Susan Stodolsky-University of Chicago, CIJE
Jonathan Woocher-JESNA

I. Project Overview

A) Summary of the synagogue change research project:

Karen Barth distributed a document describing the project entitled, "CIJE Synagogue Change Research Project"

B) General questions and issues raised about the project:

1) What does it mean to be involved in a "synagogue change project"?

Is this our umbrella term or is it a term that is used by synagogues & projects themselves?

2) Which types of synagogues are potential sites for our study?

a) Should we only study those synagogues involved in planned change processes or should we also include synagogues involved in 'naturally occurring change' (e.g. Bnai Jeshurun, NY)?

b) Should we focus on those synagogues which are explicitly concerned with the educational life of synagogues?

3) Should we link this research to CIJE's research project on lay leadership? We may want to focus on the role of lay leaders in the process of institutional change.

4) Who is the audience for this report? can research be done to actually help people in synagogues?

5) Is there useful literature on institutional change?

6) Since synagogues can be conceived of as "organized anarchies" with loosely coupled systems, is it even appropriate or realistic to aim for holistic change?

7) Can you change the sub-systems of a synagogue without changing the whole institution? e.g.) Can major changes take place in a synagogue school without changing the synagogue as a whole?

- 8) There may be a difference between the "stated goals" and the "covert goals" of change projects.
- 9) Perhaps we should look at how the synagogue enhances the educational experiences of particular clusters in the synagogue (e.g. day school families).
- 10) To what extent is synagogue change driven by external factors such as demographics?
- 11) In assessing change in synagogues, we need to watch out for the Hawthorne effect. Not all observed changes may be due to a change project per se.

II. Discussion: Clarifying the Focus of Research Questions & Unit of Analysis

- A) Are we interested in synagogue change processes or synagogue change?
- B) Is the unit of analysis the change process itself, synagogues involved in planned change projects, or individuals in these synagogues?
- C) Are we interested in determining the type of synagogue that achieves change or in determining the type of planned change process that is most successful?
- D) Do we want to compare different change processes/ models of change?
(e.g. compare a synagogue that is part of Synagogue 2000 vs. one that is part of ECE)
- E) Should we look at the effects of synagogues change on all individuals in synagogues or just those congregants who are in the "change club"?
- F) Should we reduce the number of research questions due to feasibility constraints?

III. Discussion About the Definition of Successful Change

- A) Should we define success in terms of meeting the objectives of the change-project leaders or in terms of achieving certain successful outcomes defined by the researchers? In other words, should we define success as fidelity to each project's goals or should we develop an 'objective' list of indicators of effective change ("colleague-correlated success measures")?
- B) Should we define success in terms of achieving implementation-process goals or achieving pre-specified outcome objectives?
- C) Possible definitions of success are:
 - 1) A change in the synagogue's organizational structure
 - 2) Changes in individual congregants' lives (those in the "change club" and/or others)
- D) Perhaps we should focus on indicators of educational improvement.

IV. Discussion About Research Subjects & Perspective

A) Who are the subjects of the research?

B) From whose perspective should we study change? There are various perspectives we could potentially incorporate in determining the extent of change that has actually taken place in synagogues:

1) Change project leaders and consultants (at the national level)

2) Synagogue members

-Leaders of synagogues who are part of the "change club"

(those who "signed up for" participation in the change project)

-Other lay leaders

-Other congregants

-Staff members who have to implement the change

3) Outsiders in the community

(e.g) We could potentially ask community members to

name synagogues in the community that are most known for change.)

V. Discussion Of Research Methodology

Several methodological ideas and issues were presented, including:

A) Study fewer than 40-50 synagogues, but get data from multiple sources.

B) Explore issues or factors that have more promise in depth. Perhaps have hypotheses about certain factors that are potentially linked to success. Some specific hypotheses or points of view were presented, such as:

1) A school that is embedded in a synagogue that values education is more likely to result in sustained educational change.

2) Teaching young people within a context that enacts what it is teaching is likely to lead to more successful education.

3) The presence of a skilled outside facilitator is critical for a vision-driven paradigm shift. The quality of the facilitator is correlated with success rate.

C) Explore a few synagogues in more depth.

D) Look at temporal sequences to get cause & effect. Note, however, that here is a logic problem if do not have bench-mark measures, and if you are observing synagogues while change is already in process.

E) Conduct a meta-evaluation to determine the extent to which synagogues are meeting their goals.

F) Conduct an evaluation of educational outcomes, based on educational indicators determined by the researchers.

G) Conduct a statistical study in which we vary the intervention inputs and look at educational-indicator outputs

H) Look at 2-3 examples of "well" and "not well" synagogues within each model (i.e. a few each from Synagogue 2000, ECE, McKinsey, Boston, etc.), focusing on the change process instead of institutional change itself

I) Follow a "mixed model" approach: Study 2-3 synagogues in each category, and also administer an annual survey of synagogue leaders to "take the temperature" of each synagogue & assess scores on some pre-determined indicators of success.

J) Visit 25-30 synagogues for short observation periods and write portraits instead of case studies, and also study 2-3 synagogues in depth.

K) Should we aim to write ethnographies, case studies, portraits, or impressionistic summaries?

L) Should we conduct observations as well as interviews?

M) Site selection for this study should not be random. Surveys should have random sample, but case studies should not be random.

VI. Pragmatic Issues Raised

A) There are time constraints, so certain research methods may not be feasible. ("This is not a 3 year R & D project"; " You don't have to answer every research question")

B) There are obviously budget constraints, so certain research methods may not be feasible.

C) It will be difficult to get some of the information we need.

D) There are no benchmarks.

E) We need to consider the funders' needs.

VII. Next Steps

January 5th research methodology meeting in Chicago

Notes from CIJE Synagogue Change Research Consultation 1/5/98

Participants:

Isa Aron-Hebrew Union College (HUC), Experiment in Congregational Education (ECE)
Adrienne Bank-Synagogue 2000
Karen Barth-CIJE
Ellen Goldring-Vanderbilt University, CIJE
Cippi Harte-CIJE
Jack Kugelmass-Arizona State University
Lisa Malik-CIJE
Daniel Pekarsky (by phone)-University of Wisconsin, CIJE
Riv-Ellen Prell-University of Minnesota
Joseph Reimer-Brandeis University, Hornstein Program
Susan Shevitz-Brandeis University, Hornstein Program
Barry Shrager-Boston Council of Jewish Philanthropies
Susan Stodolsky-University of Chicago, CIJE
Rob Waitman (by phone)-McKinsey Consulting
Jonathan Woocher-JESNA

I. Project Overview

A) Summary & clarifications of the synagogue change research project

B) General questions about the project:

1) Is this research or evaluation?

- It is a gray area in between research and evaluation.
 - Research about change processes often looks like evaluation.
 - We must be sensitive about not "grading" specific synagogues or projects.
- Rather, we should identify aspects or factors that cut across the various change projects and extrapolate major themes across projects.

2) Who is the audience for this research?

- There are multiple audiences for this research:
 - people working as planners and participants in planned change processes.
 - Jewish communal lay leaders, funders, professionals and lay leaders in synagogues, and leaders of institutions that train rabbis, cantors, and educators.
- In designing the research, we should focus on the first group but also consider making it useful to the second group.

3) What is the unit of analysis for the research?

- We discussed focusing on synagogues involved in planned change projects.
- We discussed the idea of focusing on change projects that have an educational aspect

II. Discussion of Research Questions and Hypotheses

A) Overall objectives of the study: What do we want to learn?

- Ideally, we would like to know "what works?" (some basic principles about synagogue change and how we can improve synagogue change efforts), but this may not be possible.
- Ultimately, we want to answer the question, "If I were designing a synagogue change project, what would I need to know?"

B) Proposed research questions:

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

- What planned change projects are there?
- What are the envisioned steps of these change projects?
(i.e. What is the design for change in each project?)
- Which synagogues are involved?
- What are the stated objectives of these projects?
- What are the stated Jewish educational objectives of these projects?
- What are the definitions and criteria of success for each change project?

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

For example:

- What have been the perceived outcomes of these synagogue change projects in terms of process implementation and impact?
- How does actual process implementation match up to the envisioned process?
- In what ways have individual synagogues adapted their change processes to meet their individual needs?
- What has been the perceived impact on synagogues and on individual participants?
- We might want to focus our study on educational outcomes.

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

We might want to focus our study on a few factors that are potentially linked to success such as: the role of leadership, the role of articulated visions, the role of outside consultants, the influence of the environmental context, and the influence of synagogue characteristics such as location and growth rate. We might also want to compare the relative impact of an imposed vs. a self-defined vision, and the relative impact of an imposed vs. a self-defined process.

III. Discussion of Research Methodology

A) Possible methods (pending time and budget constraints):

- 1) Proposed methods for research question #1 (map of landscape):
 - a) Interviews with project leaders
 - b) Analysis of written documents
- 2) Proposed methods for research question #2 (perceived outcomes):
 - a) Interviews with project leaders, synagogue professionals and lay leaders, and other congregants (participants and non-participants)
 - b) Analysis of existing data collected by change project leaders and evaluators
 - c) "Conversations": carefully structured and facilitated group discussions with project leaders and/or reflective participants for the purpose of sharing successes and failures in a safe environment.
- 3) 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 professionals and lay leaders, and other congregants (participants and non-participants)
 - c) Analysis of existing data collected by change project leaders and evaluators
 - d) "Conversations": carefully structured and facilitated group discussions with project leaders and/or reflective participants for the purpose of sharing and codifying lessons learned so far, and generating hypotheses or hunches about specific factors that might be linked to synagogue change.
 - e) Synagogue-level field research:
 - Case-studies and/or site visits
 - Interviews, observations, and/or focus groups with project leaders, professional and lay leaders, and other synagogue members
 - Focus on exploring certain factors that emerge from the "conversations" (e.g. the role of the rabbi and other synagogue leaders, the role of the consultant).
 - Look for cross-cutting components ("ingredients" of change processes and characteristics of synagogues).

B) Issues raised in discussion of research methodology

- 1) Whose perspective do we want? We need to be sure that all relevant voices are heard, including the voice of the congregants.
- 2) What are the possible functions that the "conversations" could serve?
 - a) Further refine the research questions.
 - b) Share and codify lessons learned.
 - c) Generate hypotheses or hunches for research question #3.
 - d) Develop a group of lay leaders who would be interested in synagogue change and/or Jewish education.
 - e) Put synagogue change and Jewish education on the Jewish communal agenda.

- 3) Should we find additional funders and/or partners to host the "conversations"?
- 4) What would be the purpose of the synagogue-level case studies or site visits?
 - a) A "reality check" for the landscape map (research question #1)
 - b) A method of understanding outcomes (research question #2)
 - c) A way of shedding light on the factors that seem to be linked to success (research question #3), focusing on factors that emerge from the "conversations"
 - d) Perhaps new research at the synagogue level is not needed at all; maybe the existing data that the project leaders have collected is enough.
- 5) What is the optimal timing/sequencing of the various components of the research? There were a variety of opinions expressed, including:
 - a) Conduct the main components of the research (interviews for the map, "conversations", and synagogue site visits) simultaneously.
 - b) Conduct the main components of the research (interviews for the map, "conversations", and synagogue site visits) consecutively:
 - Conduct the "conversations" after the map (research question #1) is complete, so that participants can react to it.
 - Conduct the "conversations" and work on the map simultaneously, but hold off on the synagogue-level field research until we can gather and synthesize what is already known by the leaders of the change projects and some synagogue leaders and congregants.
- 6) What could be CIJE's unique contribution to the synagogue change movement? It was felt that CIJE could make an enormous contribution by bringing people together from various change projects, synagogues, and affiliations.
- 7) What is the potential impact of the synagogue change movement on lay leaders and funders?

IV. Discussion about the challenges of a project like this:

- We should avoid shallow conclusions and a simple rehashing of what we already know.
- It is difficult to define and measure "change".
- It is difficult to assess change and outcomes, particularly if we do not have any baseline/benchmark measures and if we will only be viewing a snapshot of an ongoing change process.
- It is difficult to attribute particular outcomes in synagogues to change projects per se.
- It is difficult to assess eventual outcomes since many change projects and synagogues are at an early stage in the change process.
- There is a disparity between having a descriptive methodology (that describes what is happening) and a desire to find answers to the questions "What works?" and "How can we improve?".

- How can we make sure that all relevant voices are heard (e.g. program participants, congregants who are non-participants, community members, synagogue staff and lay leaders, and project leaders)?
- It may be difficult to obtain some information because of confidentiality issues.
- There are time and budget constraints, so we might not be able to implement all proposed research methods.

V. Possible end products of this research project

A) Possible papers and reports based on the research

- 1) Map of change projects (research question #1)
- 2) Lessons learned according to the leaders (research questions #2 and #3)
- 3) Findings of synagogue-level research (research question #3)
- 4) Motivational report to encourage funders' investment in the arena of synagogue change

B) Possible test project in cooperation with the movements, the existing change projects, and/or one community

VI. Next steps

- Refine research design and methodology.
- Set meeting for synagogue research leadership team.



CIJE

Council
for
Initiatives
in
Jewish
Education

February 26, 1998

Dear

In response to the changing realities of Jewish life in America, many institutions and agencies are engaged in a process of reimagining and reinventing themselves. This environment of change is placing new demands on rabbinic leadership. Several (if not all) of the major rabbinical schools have begun assessing their programs in light of these external changes. In our consultations with rabbinic programs and in running leadership seminars, we have seen that in spite of the very real differences in outlook and practice among the various movements many of the critical issues in training rabbis cut across the denominational spectrum.

The Nathan Cummings Foundation and CIJE have jointly agreed to sponsor a conference that will bring together leaders of rabbinic training programs from around the world to discuss some of the common issues they face as they plan for the future. This conference will be organized around a highly interactive format. Our aim is to facilitate the sharing of ideas among the various rabbinic institutions and to seed the discussion with stimulating ideas from other fields (i.e. business, general education, leadership training and political science.)

The conference will take place over 3-days and 2-nights at a retreat center. Some issues of interest we have heard in preliminary discussions with rabbinical school leaders are:

- Changing rabbinic roles and their implications for educational goals and programs
- The development of the rabbi as a spiritual/ethical person
- New findings in the field of adult learning
- The recruiting, training, development and ongoing management of rabbinical school 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 design of the conference will reflect the expressed needs and concerns of leaders of rabbinic programs. For this reason, we are inviting each institution to appoint a point person to serve on the planning committee. The planning group will help develop the agenda, the invitation list, the topics to be discussed, the presenters and the logistical arrangements. Planning meetings will take place in New York, but those who wish to join by phone will be welcome.

Please let us know if you are interested in attending, and, if so, who from your institution would like to participate in this conference. In general, we would like to invite up to two people from each school, but exceptions can be made where appropriate. It is our thinking to keep this group small enough to allow for maximum participation and interaction. If there is someone from your institution who can help with the planning, please send his/her name and contact information at your earliest convenience (see attached form).

The conference will be free of charge. CIJE and Nathan Cummings Foundation will underwrite all hotel and meal costs. Travel expenses will be the responsibility of individual participants, although travel stipends are available for those who need them.

We look forward to your participation and hope to hear from you soon.

B'shalom,

Karen A. Barth
Executive Director

cc: Rachel Cowan

**CIJE Conference on Rabbinic Education
List of Invited Participants**

Rabbi Norman J. Cohen, Provost
Hebrew Union College - Jewish Institute for Religion, New York, NY
Attendees: Norman Cohen, Sheldon Zimmerman
Planning Committee: Norman Cohen

Dr. Daniel Gordis, Dean of Rabbinics
Ziegler School of Rabbinic Studies, University of Judaism, Bel Air, CA
Attendees: Daniel Gordis, Edward Harwitz, Aryeh Cohen
Planning Committee: Daniel Gordis

Rabbi Robert S. Hirt, Vice President for Administration and Professional Education
Rabbi Isaac Elchanan Theological Seminary (RIETS), New York, NY
Attendees:
Planning Committee:

Rabbi William H. Lebeau, Dean of Rabbinical School
Jewish Theological Seminary of America, New York, NY
Attendees: William Lebeau
Planning Committee: William Lebeau

Rabbi Professor Jonathan Magonet, Principal
The Leo Baeck College, London, England
Attendees: Jonathan Magonet
Planning Committee: Jonathan Magonet

Rabbi Marcia Prager, Head of Rabbinical Program
Aleph: Alliance for Jewish Renewal, Philadelphia, PA
Attendees: Marcia Prager
Planning Committee: Marcia Prager

Dr. David Teutsch, President
Reconstructionist Rabbinical College, Wyncote, PA
Attendees: David Teutsch, Reena Spicehandler
Planning Committee: David Teutsch, Reena Spicehandler

Rabbi Shohama Wiener, President
Academy for Jewish Religion, New York, NY
Attendees: Shohama Wiener, Samuel Barth
Planning Committee: Samuel Barth

Rabbi Dr. David Weiss-Halivni, Resh Metivta
Institute of Traditional Judaism (The Metivta), Teaneck, NJ
Attendees:
Planning Committee:

Rabbi Dr. Felipe Yafe, Dean
Seminario Rabinico Latinoamericano, Buenos Aires, Argentina
Attendees: Felipe Yafé, Abraham Skorka
Planning Committee:

PEARL BECK
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New York, New York 10025
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EDUCATION

Ph.D. Social Psychology
Graduate Center of the City University of New York, 1983

A.B. Barnard College, 1973
Magna Cum Laude

PROFESSIONAL EXPERIENCE

Research Director

School Based Mental Health Program; New York State Office of Mental Health
March, 1997 - present

Senior Research Fellow

City University of New York Graduate Center
Present

- Directed study of the boards of major national Jewish organizations
- Directed evaluation of educational outreach project to Jewish college students

Research Director

Hadassah; The Women's Zionist Organization of America
November, 1993 - August, 1996

- Directed organizational research, including membership and fundraising analysis
- Developed research instruments, collected data, designed databases, analyzed and presented
- results to high level decision makers
- Conducted focus groups
- Supervised professional staff

Research Associate

Institute for Health, Health Care Policy and Aging Research
Rutgers University
June 1988 - October, 1993

- Directed a survey and needs assessment of New Brunswick's elderly; devised recommendations for improving the city's social and health services for the elderly
- Directed the evaluation of New Jersey's Respite Care Program: analyzed utilization trends and caregiver experiences.
- Directed research on HIV+ patients in psychiatric facilities
- Directed an AIDS prevention research and intervention program for the sexual partners of IV drug users.
- Directed the evaluation of New Jersey's Contact Notification Program for the partners of HIV+ individuals.

Project Director: Adult Services Research

New York City Human Resources Administration (HRA)
Office of Policy and Economic Research
July 1983 - May 1988

- Directed an evaluation of a homelessness prevention program
- Directed New York City's Single Room Occupancy Resident Survey
- Project and Research Director: Home Care Fiscal Management Project

PROFESSIONAL EXPERIENCE, CONT'D

Project Coordinator January 1980 - July 1983
New York City Board of Education; Office of Educational Evaluation

- Directed the evaluation of dropout prevention programs

Research Associate
Vera Institute of Justice
January 1979 - December 1979

Assistant Project Director
Hospital Audiences, Inc.
March 1978 - September 1978

Research Assistantships
Graduate Center, City University of New York
September 1975 - June 1976

Center for Policy Research
August 1973 - June 1975

COMPUTER ANALYSIS

January 1979 - December 1983

- Conducted computer and statistical analyses using SPSS
Affiliations of clients included: Albert Einstein Medical Center; Doubleday Publishers; American Jewish Committee

SOCIAL SERVICE EXPERIENCE

Administrator
Project Ezra - a friendly visiting program serving the isolated elderly
June 1973 - September 1974

Psychotherapist
Community Services for Human Development
September 1981 - August 1982

Clinical Intern
Coney Island Hospital
Adult and Child Psychiatry Services
January 1980 - June 1981

TEACHING EXPERIENCE

Hunter College; City University of New York
February 1979 - January 1980

- Taught courses on social research skills

Horowitz, B., Beck, P. and Kadushin, C. The Roles of Women and Men on the Boards of Major American Jewish Organizations: A Research Report, City University of New York; The Center for Jewish Studies and the Center for Social Research; November, 1997

Beck, P., and Crystal, S. Survey and needs assessment of New Brunswick's elderly. Final report to New Brunswick Tomorrow, May, 1993.

Crystal, S., and Beck, P. A room of one's own: The SRO and the single elderly. The Gerontologist, 32(5):684-692, 1992.

Crystal, S., Beck, P., Dengelegi, L., and Krishnaswami, S. Service utilization, participant outcomes and waiting list caregivers in the New Jersey state-wide respite care program. Final report to New Jersey Department of Human Services, 1992.

Crystal, S., Dejowski, E., and Beck, P. Evaluation of the New Jersey respite care pilot project. Final report to New Jersey Department of Human Services, 1991.

Dejowski, E., Dengelegi, L., Crystal, S., and Beck, P. Partner notification in AIDS, in Homosexuality (edited by J. Weinrich and J. Gonsiorek). Beverly Hills: SAGE Publications, 1991.

Crystal, S., Dengelegi, L., Beck, P., and Dejowski, E. AIDS contact notification: initial program results in New Jersey. Journal of AIDS Education and Prevention, 2(4), 284-295, 1990.

Crystal, S., Dengelegi, L., Dejowski, E., and Beck, P. Contact notification and the control of the HIV epidemic, in Santé Publique et Maladies a Transmission Sexuelle, Des Voies de Recherche Pour L'Avenir (Colloque INSERM) (edited by N. Job-Spira). Montrouge, France: John Libbey Eurotext, 1990.

Crystal, S., Dengelegi, L., and Beck, P. Contact notification for AIDS prevention in New Jersey. Final Report to New Jersey Department of Health, 1989.

Crystal, S., Guttmacher, S., Beck, P., and Karus, D. AIDS-related knowledge, attitudes, and behaviors of inner city, non-school attending youth. Final report to Robert Wood Johnson Foundation and New Jersey Department of Health, 1989.

Beck, P. The changing face of New York city's SRO's: A profile of residents and housing. New York City Human Resources Administration Office of Policy and Economic Research, 1988.

Crystal, S., Flemming, C., Beck, P., Smolka, G. The management of home care services. New York: Springer Publishing Co., 1987.

Gottesman, R., Hankin, D., Levinson, W. & Beck, P. Neurodevelopmental functioning of good and poor readers in urban schools. Journal of Developmental and Behavioral Pediatrics. 1984, 5(3), pp. 109-115.

Beck P. Two successful interventions in nursing homes; the therapeutic effects of cognitive activity. The Gerontologist. 1982, (22), pp. 378-383.

Weinglass, J. & Beck, P. Psychology and Jewish women. In S. Elwell & E. Levenson (Eds.), The Jewish Women's Study Guide. New York: Biblio Press, 1982, pp. 33-53.

Langer, E., Rodin, J., Beck, P., & Weinman, C. Environmental determinants of memory improvement in late adulthood. Journal of Personality and Social Psychology. 1979, (37), 2003-2013.

PAPERS PRESENTED

Beck, P. Power and Parity: The Roles of Women and Men on the Boards of Major American Jewish Organizations. Presented at the 65th General Assembly of the Council of Jewish Federations, Indianapolis, Indiana, November, 1997.

Horowitz, B., Beck, P. and Kadushin, C. Key players on the American Jewish scene: the networks of American Jewish organizations. Presented at the Association for Jewish Studies, Boston, 1995.

Beck, P., Krishnaswami, S., and Crystal, S. Respite care utilization trends and correlates in a state-wide respite care program. Presented at the American Public Health Association Annual Meeting, Washington, D.C., November, 1992.

Beck, P. New Jersey's respite care program. Presented at the Coolfont Conference "The changing face of informal caregiving." Coolfont, West Virginia, October, 1992.

Beck, P., Dejowski, E. and Crystal, S. The implications of New Jersey's respite care program for a national respite policy. Presented at the Gerontological Society of America Annual Meeting, San Francisco, November, 1991.

Beck, P., Dejowski, E. and Crystal, S. Using respite care to alleviate caregiver burden and isolation. Presented at the American Public Health Association Annual Meeting, Atlanta, November, 1991.

Crystal, S., Beck, P., Guttmacher, S., Karus, D., and Dengelegi, L. Dangerous myths: misconceptions about AIDS among inner-city, non-school attending youth. American Public Health Association Annual Meeting, New York, October, 1990.

Guttmacher, S., Kohn, S., and Beck, P. Helping women to reduce the risk of HIV infection: an assessment of community based programs in New York. American Public Health Association Annual Meeting, New York City, October, 1990.

Crystal, S., Schiffler, N., Dejowski, E., Hansell, S., Merzel, C., and Beck, P. Female family members as mediators of utilization of health and social services. Fifth Annual International Conference on AIDS, Montreal, June 1989.

Beck, P. Helping activities & helping norms in informal participatory prayer groups. Association for Jewish Studies Annual Conference. Boston, Mass, December 1986.

Flemming, C. & Beck, P. The home care fiscal management project. Presented at the National Council on Aging Conference. Washington D.C., April 1984.

Beck, P. & Flemming, C. Use of a consortium approach in home care fiscal management. Presented at the American Public Welfare Association Research and Demonstration Conference. Washington D.C., November 1984.

Beck, P. Sex, expressivity and religious orientation: Comparing traditional and non-traditional groups. Presented at the American Psychological Association Annual Convention. Anaheim, August 1983.

Beck, P. Memory improvement in the aged as a function of increased motivation. Presented at the Gerontological Society Meeting. San Diego, November 1980.

Beck, P. Therapeutic interventions with the elderly. Presented at the American Orthopsychiatric Association Convention. Toronto, April 1980.

Lay Leadership Study: Research Plan

Pearl Beck, Ph.D.

Council for Initiatives in Jewish Education

March, 1998

Lay Leadership Study: Research Plan

Long-term Objective:

To expand the pool of people with talent and resources who are interested in Jewish education and who are willing to serve as board members, funders, and in other lay leadership roles in Jewish educational institutions and organizations.

Research Goals:

1. To identify factors which motivate lay people to become involved -- and to maintain their involvement -- with Jewish educational issues and institutions
2. To profile the current Jewish education lay leadership
3. To identify factors, including personal and structural, which serve as impediments to lay involvement in Jewish educational issues and institutions
4. To recommend strategies for recruiting capable lay leaders and for sustaining their interest in Jewish education.

Underlying Assumption:

Jewish educational improvement will not occur without a partnership of outstanding lay leaders and professionals.

Sampling Frame:

Local Lay Leadership:

The Jewish educational lay leadership of 3 cities will be surveyed. An attempt will be made to select cities that represent each of the 3 categories of cities developed by the Council of Jewish Federations (e.g. large, large-intermediate and intermediate). In each city, a comprehensive listing will be gathered consisting of those who are active in local Jewish educational institutions as well as those who are active in local communal institutions, such as in JCC's and in local Foundations. This list will be compiled with the help of the local Jewish educational lay leadership.

National Lay Leadership:

To survey the leadership of national Jewish educational organizations (e.g. JTS, JESNA, CAJE) complete lists will be obtained and surveys will be sent to the volunteer leaders of these organizations. (When the number of people on a board exceeds 100, surveys will be sent only to executive committee members).

Jewish Lay Leaders Not Involved in Jewish Education:

To learn why some lay leaders in Jewish settings do not become involved in Jewish educational issues and organizations, we plan to interview approximately 15 such individuals who will be identified by informants located in each of the 3 selected cities. Five to ten Jewish individuals who are exclusively involved in general (non-Jewish) causes will also be identified and interviewed for this study.

Research Methodology:

Several methodologies will be used to address the research goals listed above.

1. In-Person Interviews: The first stage of the research will consist of conducting in-depth, one-on-one interviews with approximately 25-30 lay leaders and philanthropists. Those interviewed will include both those currently involved with Jewish education as well as those involved with other Jewish causes, exclusive of Jewish education. We will attempt to interview prominent national leaders, local leaders (e.g. board members of primary or secondary Jewish schools), as well as several individuals who are simultaneously involved on the local and the national levels.

2. Survey: Information culled from these interviews will be used to design a closed-ended survey. This survey will be sent to all the leaders and philanthropists identified in 3 (yet to be selected) cities as well as individuals who are involved on the national level. The survey will be sent to approximately 500 individuals. A 50 - 60% response rate is anticipated.

3. Focus Group: After the survey and interview data are analyzed, the findings will be presented to a group of Jewish education lay leaders for their comments, interpretations and recommendations. Their reactions to the data will be incorporated into the results section of the final report.

Research Topics and Questions:

1. Interview and Survey Questions for Jewish Educational Lay Leadership:

In addition to obtaining demographic information, the following topics will be included:

Lay Career

- What originally motivated them to assume their first volunteer position in the field of Jewish education?
- Do they serve on the Boards of other Jewish institutions? (If yes, which?) Are they supporting other Jewish causes? (Which?)
- What (if any) lay position/s would they like to hold in the near-term and also in the long-term?
- Do they volunteer their time for any other Jewish causes? (If yes, which causes? Are they on the boards?)
- Do they volunteer their time for other general (non-Jewish) causes? (If yes, which ones and how do these organizations compare to the Jewish ones in terms of functioning, efficacy, volunteer responsibilities, gratification derived, etc.?)

Experience with Jewish Educational Endeavors

- What factors serve to sustain their interest in Jewish education? (e.g. Which project did they particularly enjoy doing? What issue interests them?)
- What frustrations/disappointments have they experienced in this area?

Attitudes Regarding Jewish Educational Issues

- What do they regard as the major issues facing American Jewish education?
- How can these issues be addressed? What is their experience with, and impression of, the Jewish educational lay leadership?
- What can be done to encourage lay leaders and philanthropists to become more involved with Jewish education?
- What can be done to encourage lay leaders to increase their level of giving to Jewish education?
- What kind of information and/or knowledge would help them be better lay leaders in the Jewish world?

Jewish Background & Jewish Education

- In what denomination, and with what level of observance and knowledge, were they brought up?
- What is their current level of observance, Jewish knowledge and Jewish learning?
- Would they be interested in a Jewish learning program?
- Is their household/extended family a Jewish education "user"? If yes, what kinds and levels of Jewish education do they use (or have they used in the past?)

2. Interview Questions for Those Not Involved in the Lay Leadership of Jewish Education:

In addition to many of the questions listed above, individuals whose voluntary activities are located outside of Jewish education (including outside the Jewish world), will be asked additional questions including: their "lay" career paths, their knowledge of Jewish educational institutions (including lay involvement with these institutions), their knowledge of Jewish educational issues, the reasons they have not become more involved in Jewish education and where they would contribute if they wished to donate money to Jewish education.

Report

The report will incorporate information culled from the interviews, the survey and the focus group. It will describe the career paths of lay people who are involved in Jewish educational activities and will identify the factors that contributed to their initial involvement as well as the factors that served to sustain their involvement. The gratifications as well as the frustrations of volunteer work in Jewish educational institutions and organizations will be discussed.

Lay leaders' general demographic (e.g. age, gender, education, geographical area) and Jewish demographic (e.g. level of Jewish education, Jewish identity, denomination) characteristics will also be examined to provide a context for understanding their attitudes and experiences. Background information regarding the board or organization that is most important to them will also be reported (e.g. type of organization, size of organization, size of board, whether it is local or national, etc.)

To explore the potential for board development and expansion, information obtained from the interviews with leaders who are not involved in Jewish education will be presented. Perceived and actual impediments to involvement will be described.

The concluding section of the report will contain recommendations for recruiting lay leaders and also for sustaining their interest in the area of Jewish education.

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

Dr. Lisa S. Malik

March 31, 1998

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

RESEARCH QUESTIONS

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

**RESEARCH METHODOLOGY:
OVERVIEW**

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

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

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

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

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

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

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

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

Research Methodology: Phase III: SYNAGOGUE-LEVEL RESEARCH

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

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

Phase III: Site-Selection for Synagogue-Level Research

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

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

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

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

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

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

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

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

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

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

Phase III: Methodology for Synagogue-Level Research

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

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

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

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

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

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

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

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

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

Phase III: Analysis of Synagogue-Level Research

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

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

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

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

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

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

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

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

Phase IV: Institutional Survey

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

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

Phase IV: Longitudinal Study of "*Chadashim*"

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

CONCLUDING NOTES

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

CONFIDENTIAL – FINAL

MINUTES: CIJE STAFF TELECONFERENCE

DATE OF MEETING: June 11, 1998

DATE MINUTES ISSUED: July 13, 1998

PARTICIPANTS: Karen Barth, Gail Dorph, Cippi Harte, Jessica Holstein, Karen Jacobson, Nessa Rapoport

CC: Pearl Beck, Sarah Feinberg, Adam Gamoran, Ellen Goldring, Alan Hoffmann, Barry Holtz, Elie Holzer, Lisa Malik, Mort Mandel, Dan Pekarsky, Lester Pollack, Susan Stodolsky, Furman Thomas, Chava Werber

I. Staff Learning

NR led staff learning on the issues of God, change and compassion with a source from *The Moonflower Vine* by Jetta Carleton and related these ideas to the context of Jewish change.

II. Minutes

June 2 staff meeting minutes and assignments were reviewed, corrected and accepted.

III. Pre-GA Seminar

KAB reported that there was a very productive planning meeting on June 8 with leaders of the Baltimore and Cleveland communities and CAPE. Staff then discussed the possibility of inviting other communities to participate.

Assignment: JSH to distribute to staff the memo on the pre-GA seminar which was sent out following the June 8 meeting.

IV. Research Network Conference

PB presented at the conference and was asked about the sample of communities, and it was suggested that Seattle or another representative new, growing, Western community should be the next city for PB's interviews.

V. Staff Meeting Planning

PCH reported on the work of the staff meeting planning committee (PCH, KJ and NR) and distributed a list of questions that have come so far, and staff gave reactions. There are several different kinds of discussions at staff meetings:

- Updates
- Housekeeping
- Short discussions on programmatic themes
- Sharing ideas in order to develop more exciting and interesting programs.

The key issue was to better focus staff meetings. The value of reading the minutes and staff learning was discussed, as was the importance of sharing information about projects among staff who are not directly involved in projects in order to foster group cohesion and integration of work. Communication, suggestion and feedback are important. The goal is to make meetings more useful, as well as more helpful to those people (e.g. researchers) who are brought in periodically in order to integrate them and their work.

VI. Time Sheets

Not all staff are submitting time sheets, and therefore data does not accurately represent time spent on projects. This is especially problematic for restricted grants. It was agreed that the time sheets should be redesigned to reflect actual work and must be readable and user-friendly for staff. Currently, time sheets do not include all the categories needed to accurately represent staff time allocation, and there are some projects missing from the list as well. There needs to be control system in place to remind staff when to submit time sheets, and timely feedback is crucial. It was suggested that percentages of time might be more accurate if they are on a weekly rather than daily basis.

Assignment: All staff to estimate time allocation for past 6 months.

Assignment: All staff to give new categories for time sheets to KJ.

VII. Vacations

All staff should have received reports from Nikia on vacation time used so far this year. Staff were asked to submit vacation requests through September.

VIII. Filing

CW and SDF have been working on the filing system to find out what is in the current filing system in order to reduce redundancy. A list of current files was distributed to staff with a questionnaire on filing needs.

Assignment: All staff to complete questionnaire on filing needs.

It was suggested that we schedule a filing day for all staff. Staff agreed, and August 12 was put on the calendar as a possible date. Staff were asked to submit orders for supplies (pendaflex files, file folders, etc.) in advance.

IX. Wexner

Maurice Corson is retiring from the Wexner Foundation.

X. Workplan

Assignment: KAB, GZD, NR to write up respective project task descriptions.

Assignment: KAB, GZD, NR to meet about templates for delineating project tasks. Copies of templates should be sent to EG for input and feedback. All staff will apply templates to their projects before August staff retreat.

XI. Calendar

August 3 – JEWEL leadership team meeting (KAB, GZD, EG, PCH, EH)

August 4 – Synagogue Change leadership team

August 5-6 – Staff retreat (August 5 – All day JEWEL)

August 10 – Board Meeting

Assignment: JSH to call MLM's office to confirm August 10 board meeting and Mandel Institute steering committee dates.

August 12 – Filing Day

August 13 – Hold for JEWEL meeting with MLM in Cleveland (KAB, GZD)

August 17-18 – Hold for consultation with Mary Diez

Assignment: KAB to invite Nancy Raybin to consultation with Mary Diez.

August 19 – Change Think Tank

August 27 – MPP Board Meeting in Cleveland

XII. Update Letter

The first update letter will go out only to the board.

XIII. Staff Retreat Follow-Up

Following the second day of the staff retreat with Susan Cane, there were 6 initiatives assigned to 3 teams.

CONFIDENTIAL

CIJE ASSIGNMENTS

Staff Meeting Assignments June 11, 1998

NO.	DESCRIPTION	ASSIGNED TO	DATE ASSIGNED	DATE DUE
1.	KAB, GZD, NR to write up respective project task descriptions.	KAB, GZD, NR	6/11/98	7/6/98
2.	KAB, GZD, NR to meet about templates for delineating project tasks.	KAB, GZD, NR	6/11/98	7/9/98
3.	JSH to distribute to staff the memo on the pre-GA seminar which was sent out following the June 8 meeting.	JSH	6/11/98	
4.	All staff to estimate time allocation for past 6 months.	All staff	6/11/98	6/30/98
5.	All staff to give new categories for time sheets to KJ.	All staff	6/11/98	
6.	JSH to call MLM's office to confirm August 10 board meeting and Mandel Institute steering committee dates.	JSH	6/11/98	
7.	All staff to complete questionnaire on filing needs.	All staff	6/11/98	6/15/98
8.	KAB to invite Nancy Raybin to August 17/18 consultation with Mary Diez.	KAB	6/11/98	
9.	KJ to have templates from May staff retreat typed up.	KJ	6/11/98	6/15/98
10.	KAB to speak to Howie Deitcher about the interviews for the recruiting position, and report at June 22 staff meeting.	KAB	6/11/98	6/22/98
11.	DNP and NR to develop proposal for sessions and work to be done for Change Think Tank through the end of 1998.	DNP, NR	6/2/98	
12.	NR, PCH, KJ to develop proposal for staff meeting plan.	PCH, NR, KJ	6/2/98	
13.	JSH to prepare notes from first day of staff retreat.	JSH	6/2/98	
14.	KJ, GZD, NR, SDF to meet about CIJE's internet issues (external communication, website, TEI alumni network, etc).	KJ, GZD, NR, SDF	6/2/98	
15.	KAB, KJ to meet about outsourcing bookkeeping and accounting services from an outside organization.	KAB, KJ	4/6/98	

CONFIDENTIAL – FINAL

MINUTES: CIJE STAFF TELECONFERENCE

DATE OF MEETING: June 22, 1998

DATE MINUTES ISSUED: July 13, 1998

PARTICIPANTS: Karen Barth, Gail Dorph, Cippi Harte, Jessica Holstein, Karen Jacobson, Nessa Rapoport

CC: Pearl Beck, Sarah Feinberg, Adam Gamoran, Ellen Goldring, Alan Hoffmann, Barry Holtz, Elie Holzer, Lisa Malik, Mort Mandel, Dan Pekarsky, Lester Pollack, Susan Stodolsky, Furman Thomas, Chava Werber

I. Staff Learning

KJ led staff learning with an exercise in creative thinking.

II. Minutes

June 11 staff meeting minutes and assignments were reviewed, corrected and accepted.

III. PEJE

The PEJE booklet on day schools has come out and will be circulated among the staff.

IV. Board Meeting

Proposed agenda:

- Workplan
 - JEWEL
 - Teacher Training
 - Internal Management Update
 - Updates: Forum (marketing), Professors, CFWW.
- CFWW and the research agenda to be on October board meeting agenda.

Workplan:

On the workplan and budget, we should give a broad picture of the projects on the workplan and what has been taken off, discuss 4 to 5 big issues and give the rough 6 month budget. The change of fiscal year needs to be voted on by the board as well.

Assignment: KAB to develop chart relating R&D to workplan.

JEWEL:

Assignment: EG to write 2-page update on JEWEL.

Teacher Training:

Mark Rosenberg to set up videoconferencing facilities. Anna Richert, Vicki Kelman and Laura Novak-Wiener could be asked to present as a group via videoconference on how TEI has affected the process of teaching and learning for them. Perhaps Mark could also prepare a short clip from the TEI graduation. If Anna is not available, Sharon Feiman-Nemser could be asked to present.

Assignment: GZD to email Anna Richert regarding the August 10 board meeting.

Assignment: GZD, BWH to work on board presentation.

Internal Management Update:

We should update the board on the internal work we have been doing in terms of recruiting and organizational development, especially in the areas of project management and development of support staff.

We should ask the board for feedback on the videoconferencing and get other input from them as well on how they feel about the format and content of our board meetings.

AG is attending. EG is not attending. Lee Hendler and Esther Leah Ritz are not attending. Staff to confirm board attendance when they set up individual meetings (below). Hold-the date notice to go out before July 7.

Assignment: NR to contact DNP regarding August 10 board meeting.

Materials:

Teachers Report to go out with the update letter. JEWEL update to go out with board materials. There will be materials on the workplan, which will be ready after the staff retreat. The binders should be put together by July 30 according to schedule and the workplan materials will be inserted later.

Assignment: GZD, EG to look for an article on leadership to send out with the August board meeting materials.

Workplan issues and research agenda to be discussed at individual meetings with board members. Assignments as follows:

KAB: MLM, LP, Stanley Horowitz, Steve Hoffman (by phone)
GZD/PCH: John Colman, Esther Leah Ritz, Lee Hendler
PCH: Chuck Ratner

V. Scheduling

Filing day: August 20
Mary Diez: to be determined.
Project management training: September 15, 1-5 pm
NR travelling to Boston every week starting July 13 for 3 weeks.

Assignment: KJ to distribute vacation schedule.

VI. Recruiting

Leah Strigler has been offered the CIJE/CAPE recruiter position, and will be working with GZD on TEL. We have 2 active candidates for the research director position.

Assignment: KJ to set up meetings with staff and phone meetings with AG, EG for research director candidate.

VII. Susan Cane Follow-Up

KAB and KJ are continuing to work on support staff development over the summer. Since project management is linked to accountability, it was decided that a team should work on applying a project management template to JEWEL, and then discuss it at the August 3 JEWEL meeting in addition to EG's synthesis of the JEWEL scans.

Assignment: PCH, GZD, EG, KJ apply project management template to JEWEL.

VIII. August Staff Retreat

KJ reported on possible sites, and it was decided that we will hold the August staff retreat at Baruch if it is available. We will continue to look for other sites for future use.

IX. Professors Follow-Up

Each project manager is to receive the notes from the discussion at the Professors Seminar of his/her project.

CONFIDENTIAL

CIJE ASSIGNMENTS

Staff Meeting Assignments June 22, 1998

NO.	DESCRIPTION	ASSIGNED TO	DATE ASSIGNED	DATE DUE
1.	GZD to email Anna Richert regarding the August 10 board meeting.	GZD	6/22/98	
2.	GZD, BWH to work on board presentation.	GZD	6/22/98	7/1/98
3.	KAB to develop chart relating R&D to workplan.	KAB	6/22/98	
4.	EG to write 2-page update on JEWEL.	EG	6/22/98	7/31/98
5.	NR to contact DNP regarding August 10 board meeting.	NR	6/22/98	
6.	GZD, EG to look for an article on leadership to send out with the August board meeting materials.	GZD, EG	6/22/98	7/23/98
7.	KJ to distribute vacation schedule.	KJ	6/22/98	
8.	KJ to set up meetings with staff and phone meetings with AG, EG for research director candidate.	KJ	6/22/98	
9.	GZD, EG, PCH, KJ apply project management template to JEWEL.	GZD, EG, PCH, KJ	6/22/98	8/3/98
10.	KAB, GZD, NR to write up respective project task descriptions.	KAB, GZD, NR	6/11/98	7/6/98
11.	KAB, GZD, NR to meet about templates for delineating project tasks.	KAB, GZD, NR	6/11/98	7/9/98
12.	All staff to estimate time allocation for past 6 months.	All staff	6/11/98	6/30/98
13.	All staff to give new categories for time sheets to KJ.	All staff	6/11/98	
14.	All staff to complete questionnaire on filing needs.	All staff	6/11/98	6/15/98
15.	KAB to invite Nancy Raybin to August 17/18 consultation with Mary Diez.	KAB	6/11/98	
16.	DNP and NR to develop proposal for sessions and work to be done for Change Think Tank through the end of 1998.	DNP, NR	6/2/98	
17.	NR, PCH, KJ to develop proposal for staff meeting plan.	PCH, NR, KJ	6/2/98	
18.	KJ, GZD, NR, SDF to meet about CIJE's internet issues (external communication, website, TEI alumni network, etc).	KJ, GZD, NR, SDF	6/2/98	

CONFIDENTIAL – FINAL

MINUTES: CIJE STAFF TELECONFERENCE

DATE OF MEETING: June 29, 1998

DATE MINUTES ISSUED: July 13, 1998

PARTICIPANTS: Karen Barth (via telephone), Cippi Harte, Jessica Holstein, Karen Jacobson, Nessa Rapoport

CC: Pearl Beck, Gail Dorph, Sarah Feinberg, Adam Gamoran, Ellen Goldring, Alan Hoffmann, Barry Holtz, Elie Holzer, Lisa Malik, Mort Mandel, Dan Pekarsky, Lester Pollack, Susan Stodolsky, Furman Thomas, Chava Werber

I. Minutes

June 22 staff meeting minutes and assignments were reviewed, corrected and accepted.

II. Mary Diez

Mary Diez is coming to meet with CIJE on August 17 on how to apply Alverno College's principles to CIJE's work. Staff is holding 1 to 8 pm.

III. Torah Umesorah

KAB reported on the Torah Umesorah seminar she and GZD are attending in Israel with the Torah Umesorah staff and heads of schools.

IV. Staff Meeting Schedule

The staff meeting schedule for August was reviewed and revised, and a staff meeting will be held at the staff retreat on August 5 before the JEWEL meeting. JSH to attend.

V. Staff Retreat

The August 5-6 staff retreat will be held at Union Theological Seminary; Baruch College was not available. SDF to take notes at staff retreat in order to inform and involve her more in JEWEL and the workplan. The

HR assistant or Rachel will handle logistics. All consultants are invited to attend the staff retreat (PB, AG, EG, EH, LM, DNP, SS).

VI. Board Meeting

Anna Richert may be available to attend the August 10 board meeting in person. We still intend to have videoconferencing facilities in place at the board meeting. KJ and SDF met with Mark Rosenberg. He will be here one week before the board meeting to do a trial run of the videoconferencing system, and he will also be here for the board meeting. SDF would like to attend the TEI/videoconference session of the board meeting. EH is attending the board meeting. DNP is not attending. Implementing a rotating system for support staff to attend board meetings was suggested. The hold-the-date letter for the August 10 board meeting is going out today, June 29. William will handle logistics for this meeting.

VII. Guiding Principles/School of Thought

- Assignment: DNP to revise content of Guiding Principles following discussion at Professors.
- Assignment: NR to edit language of Guiding Principles following DNP's revisions.
- Assignment: KAB to review and revise Guiding Principles for August staff retreat following revisions by DNP and NR.

VIII. Publications/External Communications

The first copies of the Teachers Report are in. Leah Strigler to attend CAJE conference and should distribute CIJE brochures. Feedback on the brochure has been very good.

- Assignment: NR, LM to discuss releasing map of existing change projects.

IX. Recruiting Update

The meeting with staff on the morning of July 6 with the candidate for research director will be rescheduled. There are strong candidates for NR's and GZD's support staff positions. KJ has several candidates for the HR assistant position, and PCH will meet with them this week. We also have a candidate for the executive assistant position. While KAB is in Israel, she would like to have phone and videoconference interviews with any serious candidates for the executive assistant position. For other positions, candidates may be hired if 2 senior staff meet with them and approve the hire.

- Assignment: KJ to send resumes for executive assistant candidates to KAB. We ran an ad in the *New York Times* yesterday, June 28, for the accountant position, and received a very good response. KJ will interview some of these candidates.

CONFIDENTIAL

CIJE ASSIGNMENTS

Staff Meeting Assignments June 29, 1998

NO.	DESCRIPTION	ASSIGNED TO	DATE ASSIGNED	DATE DUE
1.	DNP to revise content of Guiding Principles following discussion at Professors.	DNP	6/29/98	
2.	NR to edit language of Guiding Principles following DNP's revisions.	NR	6/29/98	
3.	KAB to review and revise Guiding Principles for August staff retreat following revisions by DNP and NR.	KAB	6/29/98	8/5/98
4.	NR, LM to discuss releasing map of existing change projects.	NR, LM	6/29/98	
5.	KJ to send resumes for executive assistant candidates to KAB.	KJ	6/29/98	
6.	GZD, BWH to work on board presentation.	GZD	6/22/98	7/1/98
7.	KAB to develop chart relating R&D to workplan.	KAB	6/22/98	
8.	EG to write 2-page update on JEWEL.	EG	6/22/98	7/31/98
9.	GZD, EG to look for an article on leadership to send out with the August board meeting materials.	GZD, EG	6/22/98	7/23/98
10.	KJ to set up meetings with staff and phone meetings with AG, EG for research director candidate.	KJ	6/22/98	
11.	GZD, EG, PCH, KJ apply project management template to JEWEL.	GZD, EG, PCH, KJ	6/22/98	8/3/98
12.	KAB, GZD, NR to write up respective project task descriptions.	KAB, GZD, NR	6/11/98	7/6/98
13.	KAB, GZD, NR to meet about templates for delineating project tasks.	KAB, GZD, NR	6/11/98	7/9/98
14.	All staff to estimate time allocation for past 6 months.	All staff	6/11/98	6/30/98
15.	All staff to give new categories for time sheets to KJ.	All staff	6/11/98	
16.	All staff to complete questionnaire on filing needs.	All staff	6/11/98	6/15/98
17.	KAB to invite Nancy Raybin to August 17 consultation with Mary Diez.	KAB	6/11/98	

18.	DNP and NR to develop proposal for sessions and work to be done for Change Think Tank through the end of 1998.	DNP, NR	6/2/98	
19.	NR, PCH, KJ to develop proposal for staff meeting plan.	PCH, NR, KJ	6/2/98	
20.	KJ, GZD, NR, SDF to meet about CIJE's internet issues (external communication, website, TEI alumni network, etc).	KJ, GZD, NR, SDF	6/2/98	

CONFIDENTIAL
MINUTES: SUPPORT STAFF MEETING

DATE OF MEETING: August 14, 1998

DATE MINUTES ISSUED: August 14, 1998

PARTICIPANTS: Reena Cohen, William Crow (sec'y), Sarah
Feinberg, Sylvia Syracuse, Karen Jacobson,
Furman Thomas, Liliane Botbol

CC: Karen Barth, Gail Dorph, Adam Gamoran,
Ellen Goldring, Cippi Harte, Jessica Holstein,
Barry Holtz, Lisa Malik, Dan Pekarsky, Nessa
Rapoport,

I Filing Day

Filing Day will be Thursday, August 20th. SDF explained the reasons for having a day set aside for filing. KJ and FT verified that sufficient materials were ordered (folders, boxes). Senior staff will be working on filing in their own offices, while support staff will work on the general files in the front area. The alphabetization and cross-referencing of the files was discussed, as well as a "FILE OUT" system to check out materials. CW will work on the article drawer. NS will work on the office information file. Only one copy of filed publications should be kept, to reduce superfluous copies.

II Update on CIJE changes

KJ gave a very brief summary about the restructuring of the Mandel Foundation and how it may affect CIJE.

III Billing

FT stressed the importance of coding bills before they get to her in order to make the billing and accounting systems more efficient. Some examples which were highlighted:

- Bills and receipts should be clearly labeled with a billing reference and individual's name.
- Car service receipts should be approved and clearly marked.
- Project forms and budgets for programs should have a list of attendees and clear labeling of the program to which it should be billed.

1C-1

Project Lists from May Staff Retreat

1998

1999

JEWEL

Planning

TEI

Professors

Forum

Rabbinic Conference

High School Leaders

CFWW

Planning

Torah Umesorah

Shearim

JTS

R&D

Indicators

Economics of Jewish Education

Early Childhood

Change

- Synagogue Change

- Think Tank

Lay Leadership Research

ADMIN

External Communication

Internal Communication

Fundraising

Board and Chairman's Council

PUBLICATIONS

Teachers Report

Leaders Report

Brochure

Strategic Plan

Pilot-Professional

Pilot-Lay

Planning

TEI

Professors

Forum 2000

Rabbinic Conference

High School Leaders

Conference, Launch

JCCA

Shearim

Other Pilots

JTS

Indicators/Evaluation Institute

Economics of Jewish Educ.

Field Site

Field Site

Lay Leadership Research

External Communication

Internal Communication

Fundraising

Board and Chairman's Council

Policy Brief on Professional
Development

Beit Rabban

Rabbinic Education

1C-2

Other Project Ideas from May Staff Retreat

- Think Tank on Leadership
- Network of TEI Graduates
- Internet ↑
- Publications Related to R&D
- Leveraging Academic Publications
- “Big Ideas” Publication
- Community High School in the Fall?
- Study of Informal Education
- The Movie
- Marketing Study of Interest in Jewish Ed.
vs. Economics
- Library
- Forum Publications

CONFIDENTIAL – FINAL

MINUTES: CIJE STAFF TELECONFERENCE

DATE OF MEETING: July 13, 1998

DATE MINUTES ISSUED: August 26, 1998

PARTICIPANTS: Karen Barth (via telephone), Gail Dorph, Sarah Feinberg, Cippi Harte, Jessica Holstein (minutes), Barry Holtz (via telephone), Karen Jacobson, Nessa Rapoport

CC: Pearl Beck, Adam Gamoran, Ellen Goldring, Alan Hoffmann, Elie Holzer, Lisa Malik, Mort Mandel, Dan Pekarsky, Lester Pollack, Susan Stodolsky, Furman Thomas, Chava Werber

I. Staff Learning

- KAB led staff learning with an article from Aitz Hayim Center for Jewish Living newsletter.
- Discussion followed on what is a successful synagogue.

Assignment: KAB to fax Synagogue Change map to GZD, PCH.

II. Minutes

- July 6 staff meeting minutes and assignments reviewed, corrected and accepted.

III. Susan Cane

Assignment: PCH to contact Susan Cane regarding consulting to project management and performance review meetings.

IV. Board Meeting – August 10

- JEWEL
 - Discuss where we are at update meetings, and discuss what we have learned so far at the board meeting.
 - Present JEWEL in the context of its sector.

Assignment: KAB, GZD to discuss JEWEL board presentation.

- John Colman, Chuck Ratner, Esther Leah Ritz to be briefed on JEWEL before board meeting.
- Assignment: KAB to update Steve Hoffman and Stanley Horowitz on JEWEL.
- Assignment: KAB to talk to LP about GZD meeting with him about JEWEL.
- Written document on JEWEL to be sent to MLM.
- Teacher Training
 - Focus on how TEI has impacted on the practice of its participants.
 - Introduction about work and changes in the field.
 - Video (5-10 minutes) of TEI graduates, work they are doing and what they have learned.
 - Anna Richert presents TEI work as cutting edge in professional development plus her personal connection and experience.
 - Videoconference with 2 to 3 people from one location on work they are doing now and TEI's impact on real classrooms.
 - Opportunity for discussion among board members and TEI people.
 - Video (5 minutes) from Morah Junger's class on why we study Torah.
 - Updates
 - Torah Umesorah – add to updates
 - Workplan
 - To be discussed at workplan meetings.

V. HaSha'ar

- Program has begun with 9 fellows.
- Ruth Fagen directing program.
- GZD teaching each week.
- DNP taught last week.
- EH teaching in 2 weeks.
- Deborah Ball also coming to teach.
- GZD and Deborah Ball to write a piece on the program.

VI. Mary Diez

- In charge of teacher education at Alverno College.
- Coming to consult at CIJE August 17.
- Topic for consultation – ability-based learning in theory and practice and ramifications for how CIJE thinks about:
 - Educational leadership
 - Teacher education
 - Rabbinic education
- Staff to read materials from Mary Diez in advance of consultation.

- Assignment: GZD to distribute to staff materials from Mary Diez.
- Goal for consultation – Mary Diez to introduce and discuss concepts and demonstrate how concepts work.
- Assignment: GZD to discuss with Mary Diez goals for August 17 consultation.
- Background materials to send to Mary Diez:
 - TEI Peabody article
 - TEI graduates list of what teachers need to know and be able to do
 - 2-page JEWEL pilot update
 - Conference on Rabbinic Education list of major issues
 - Consultation participants:
 - Staff including EH, BWH, Leah Strigler
 - Consultants – EG, DNP
 - Nancy Raybin – JTS consultation
 - Wendy Rosov?
 - Anna Richert?

VII. Miscellaneous

- Assignment: JSH to make check list of staff and consultants for meeting planning.

VIII. Scheduling

- ADH in New York August 2 to 10 – office needed.

IX. CAJE

- Assignment: PCH, NR to discuss distribution of materials at CAJE conference.

X. Internet/Videoconference

- Internet
 - KAB approval needed to install 56K direct line to internet.
 - 6-8 weeks needed to install 56K line following approval.
 - GZD, SDF, KJ, NR, and Mark Rosenberg met via telecon and tested Timbuktu software for sharing documents and internet searches.
- Assignment: SDF to write memo to KAB on internet issues with list of tasks to be done, timeline and individuals responsible.
- Website
 - Mark Rosenberg to build website from technical perspective.
 - We may need to hire a website graphic designer and a person to update website.
 - Publications needed in electronic format
 - Initially, text of publications to be on website.

- Later, links to other documents to be added.
- Videoconferencing
 - Mark Rosenberg here at the end of July for a dry run at JCCA.

XI. Susan Stodolsky

Assignment: BWH to email SS for final version of Professors evaluation.

- SS working on TEI evaluation.
- Other possible projects:
 - HaSha'ar evaluation design
 - JEWEL pilot evaluation
 - Design
 - Do evaluation when JEWEL is up and running.
 - Rabbinic Education
 - Attend conference
 - Design interviews and supervise researcher doing interviews
 - Community needs assessment

XII. Mike Rosenak

- To come to US in September or December.
- Possible projects to work on:
 - Change Think Tank
 - Pre-GA?
 - Leadership Study Group
 - JEWEL consultation
 - Conference on Rabbinic Education
 - Baltimore Leadership

Assignment: KAB to contact Mike Rosenak about dates he is available to come to US in December.

XIII. Pre-GA

Assignment: KAB to ask DNP about attending Pre-GA.

XIV. Researchers

- Part-time openings for researchers for the following projects:
 - Rabbinic education interviews:
 - Heads of rabbinical schools regarding their best practices, i.e. what they do that is new, different, successful.
 - Rabbis in the field regarding their rabbinical training. (NR has list of 30 rabbis from test mailing of Green study guide. Steve

Shaw, David Szonyi, Dan Freeland, Kerry Olitsky should be among first group of interviewees.)

Assignment: KAB to talk to research director candidate about rabbinic education research.

- CFWW interviews:
 - Consultants in Jewish world
 - Consultants outside the Jewish world
 - People who use consultants in the Jewish world

Assignment: PCH to contact Lisa Kohn and set up meeting with Nancy Raybin regarding CFWW research.

Assignment: KAB to email Rachel Cowan for suggestions of researchers for CFWW.

- JEWEL community needs assessment
- Synagogue Change Research – LM will need researchers in different parts of the country to do research in their areas.
- Economics of Jewish Education
- NY area graduate student needed for 1/3 time position for KAB to attend meetings and take notes and do library research.
- Early Childhood
- JCCA

- Discussion:
 - Possible candidates were discussed (see attached list).
 - KJ has some resumes from junior researchers.

XV. Clippings Coverage

Assignment: All staff to respond to NR regarding publications for clippings coverage.

XVI. Early Childhood

- GZD to Boston July 20-21 for meeting with Fran Jacobs, Donald Cohen and Boston Bureau.
- October 25 or November 1 possible dates for consultation – KAB to hold.

Assignment: GZD to email ADH about contacting Donald Cohen et al regarding dates for Early Childhood consultation.

Assignment: GZD to contact Ruth Pinkenson-Feldman for a copy of her proposal for JCCA early childhood center.

CONFIDENTIAL

CIJE ASSIGNMENTS

Staff Meeting Assignments July 13, 1998

NO.	DESCRIPTION	ASSIGNED TO	DATE ASSIGNED	DATE DUE
1.	KAB to fax Synagogue Change map to GZD, PCH.	KAB	7/13/98	
2.	PCH to contact Susan Cane regarding consulting to project management and performance review meetings.	PCH	7/13/98	
3.	KAB, GZD to discuss JEWEL board presentation.	KAB, GZD	7/13/98	
4.	KAB to update Steve Hoffman and Stanley Horowitz on JEWEL.	KAB	7/13/98	
5.	KAB to talk to LP about GZD meeting with him about JEWEL.	KAB	7/13/98	7/21/98
6.	GZD to distribute to staff materials from Mary Diez.	GZD	7/13/98	
7.	GZD to discuss with Mary Diez goals for August 17 consultation.	GZD	7/13/98	
8.	JSH to make check list of staff and consultants for meeting planning.	JSH	7/13/98	
9.	PCH, NR to discuss distribution of materials at CAJE conference.	PCH, NR	7/13/98	
10.	SDF to write memo to KAB on internet issues with list of tasks to be done, timeline and individuals responsible.	SDF	7/13/98	
11.	BWH to email SS for final version of Professors evaluation.	BWH	7/13/98	
12.	KAB to contact Mike Rosenak about dates he is available to come to US in December.	KAB	7/13/98	
13.	KAB to ask DNP about attending Pre-GA.	KAB	7/13/98	
14.	PCH to contact Lisa Kohn and set up meeting with Nancy Raybin regarding CFWW research.	PCH	7/13/98	
15.	KAB to email Rachel Cowan for suggestions of researchers for CFWW.	KAB	7/13/98	
16.	All staff to respond to NR regarding publications for clippings coverage.	All staff	7/13/98	
17.	GZD to email ADH about contacting Donald Cohen et al regarding dates for Early Childhood consultation.	GZD	7/13/98	

18.	GZD to contact Ruth Pinkenson-Feldman for a copy of her proposal for JCCA early childhood center.	GZD	7/13/98	
19.	GZD to talk to KAB, PCH about Wendy Rosov and the Conference on Rabbinic Education.	GZD, KAB, PCH	7/6/98	
20.	NR to edit language of Guiding Principles following DNP's revisions.	NR	6/29/98	
21.	KAB to review and revise Guiding Principles for August staff retreat following revisions by DNP and NR.	KAB	6/29/98	8/5/98
22.	NR, LM to discuss releasing map of existing change projects.	NR, LM	6/29/98	
23.	KJ to send resumes for executive assistant candidates to KAB.	KJ	6/29/98	
24.	GZD, BWH to work on board presentation.	GZD	6/22/98	7/1/98
25.	KAB to develop chart relating R&D to workplan.	KAB	6/22/98	
26.	EG to write 2-page update on JEWEL.	EG	6/22/98	7/31/98
27.	GZD, EG to look for an article on leadership to send out with the August board meeting materials.	GZD, EG	6/22/98	7/23/98
28.	GZD, EG, PCH, KJ apply project management template to JEWEL.	GZD, EG, PCH, KJ	6/22/98	8/3/98
29.	All staff to estimate time allocation for past 6 months.	All staff	6/11/98	6/30/98
30.	All staff to give new categories for time sheets to KJ.	All staff	6/11/98	
31.	DNP and NR to develop proposal for sessions and work to be done for Change Think Tank.	DNP, NR	6/2/98	

CONFIDENTIAL – FINAL

MINUTES: CIJE STAFF TELECONFERENCE

DATE OF MEETING: July 20, 1998

DATE MINUTES ISSUED: August 26, 1998

PARTICIPANTS: Karen Barth (hy phone), Gail Dorph, Cippi Harte, Jessica Holstein (minutes), Karen Jacobson, Nessa Rapoport

CC: Pearl Beck, Sarah Feinberg, Adam Gamoran, Ellen Goldring, Alan Hoffmann, Barry Holtz, Elie Holzer, Lisa Malik, Mort Mandel, Dan Pekarsky, Lester Pollack, Susan Stodolsky, Furman Thomas, Chava Werber

I. Minutes

July 13 staff meeting minutes and assignments were reviewed, corrected and accepted.

II. Board Meeting

- Agenda:
 - Minutes, Announcements, Assignments
 - Introduction – MLM to discuss sectors (20 minutes)
 - Audit – John Colman (15 minutes)
 - Workplan (1 hour)
 - JEWEL (1 hour)
 - Update letter on JEWEL planning process
 - KAB approved
 - NR editing, will go out in 1-2 days
 - Use overheads from last time to illustrate scans – add names
 - GZD, EG to present 3 things we have learned from scans so far
 - Board approval needed for JEWEL pilot:
 - Starting time
 - Faculty structure
 - Target audience
 - Venue
 - Lunch (45 minutes)

- TEI (1 hour)
 - Anna Richert coming in night before – hotel needed.
 - Serene Victor, Boston, agreed to present via videoconference.
 - Judy Elkin possible invitee.
 - Mark Rosenberg checking Boston videoconference sites.
 - LP to ask board for feedback on videoconferencing.
- Updates (45 minutes)

III. JEWEL Meeting – August 3, 5

- First cut decisions on pilot to be made.
 - If we plan to start in 1999, beginning list is needed of whom to recruit.
 - Budget and scheduling to be on meeting agenda
- Assignment: KAB, EG, PCH to review GZD's proposed agenda for August 3 JEWEL meeting.

IV. Staff Retreat – August 5-6

- Agenda:
 - Guiding Principles – August 5 morning
 - JEWEL – August 5
 - Discussion to be planned during August 3 JEWEL meeting
 - To be included:
 - PB's research
 - SG's research
 - Workplan – August 6
 - Use templates to look at insides of projects and assign staff time allocation.
 - Questions for discussion:
 - What is in/what is out in 10 years and how do we get there?
 - What is critical to do right away?
 - What commitments do we have already?
 - What is strategic thinking behind each project?
 - AG attending
- Assignment: AG to write up Indicators using project template.
- Assignment: JSH to obtain and distribute AG's paper on research agenda for the Jewish community.
- Assignment: JSH to distribute JEWEL scans to staff and consultants.

V. Mike Rosenak

- Available February 4 to 11, 1999
- To work on:

- Conference on Rabbinic Education, February 7 to 9
- JEWEL

VI. Researchers are needed for:

- CFWW
- Assignment: PCH to follow up with Nancy Raybin meeting regarding Lisa Kohn.
- JEWEL community needs assessment – Sally Gottesman is interested but has questions about the design, to be discussed at August 3/5 meetings.
- Rabbinic Education
- Assignment: KAB to contact Sam Heilman about rabbinic education research.
- Synagogue Change
- Assignment: KAB to contact LM about Liz Lazaroff.
- Economics of Jewish Education – KAB scheduled to meet with Shifra Bronsnick.
- KAB 1/3 time assistant
- Assignment: PCH to call Larry Moses regarding New York area Wexner Fellows.
- JCCA
 - MLM wants to do a planning project for a new Mandel Center for Jewish Education at the JCCA.
 - Knowledge of JCC's and strategic planning needed.

VII. Susan Cane – Project Management

- Scheduled to come to CIJE on:
 - Monday, July 27, 10-11 am
 - Wednesday, August 12, 10 am to 1 pm – meeting to be held in JCCA Board Room
- Assignment: PCH to update Susan Cane on JEWEL.

VIII. Staff Meeting Plan

- Revised staff meeting plan distributed to staff.

IX. Mandel Institute Information Request

- Assignment: All staff to write 2 sentences on prior background and current responsibilities.
- Assignment: NR to edit 2-sentence bios from staff and forward to Mandel Institute.

X. Recruiting Update

- Executive assistant
 - Candidate coming in this week to test skills.

- 3 other possible candidates.
- Accountant
 - We have a good candidate.
 - Auditor says that if we hire the right person, we may not need a full-time accountant.
- Researchers
 - 1-2 new resumes received per day for junior researcher.
- HR assistant
 - KJ interviewing candidates.
- GZD assistant
 - We have 2 candidates.

CONFIDENTIAL

CIJE ASSIGNMENTS

Staff Meeting Assignments July 20, 1998

NO.	DESCRIPTION	ASSIGNED TO	DATE ASSIGNED	DATE DUE
1.	AG to write up Indicators using project template.	AG	7/20/98	8/5/98
2.	JSH to obtain and distribute AG's paper on research agenda for the Jewish community.	JSH	7/20/98	
3.	JSH to distribute JEWEL scans to staff and consultants.	JSH	7/20/98	
4.	PCH to follow up with Nancy Raybin meeting regarding Lisa Kohn.	PCH	7/20/98	
5.	PCH to call Larry Moses regarding New York area Wexner Fellows.	PCH	7/20/98	
6.	KAB to contact LM about Liz Lazaroff.	KAB	7/20/98	
7.	PCH to update Susan Cane on JEWEL.	PCH	7/20/98	
8.	All staff to write 2 sentences on prior background and current responsibilities.	All staff	7/20/98	7/23/98
9.	NR to edit 2-sentence bios from staff and forward to Mandel Institute.	NR	7/20/98	7/24/98
10.	KAB, EG, PCH to review GZD's proposed agenda for August 3 JEWEL meeting.	KAB, EG, PCH	7/20/98	
11.	KAB to fax Synagogue Change map to GZD, PCH.	KAB	7/13/98	
12.	KAB to update Steve Hoffman and Stanley Horowitz on JEWEL.	KAB	7/13/98	
13.	GZD to distribute to staff materials from Mary Diez.	GZD	7/13/98	
14.	GZD to discuss with Mary Diez goals for August 17 consultation.	GZD	7/13/98	
15.	SDF to write memo to KAB on internet issues with list of tasks to be done, timeline and individuals responsible.	SDF	7/13/98	
16.	BWH to email SS for final version of Professors evaluation.	BWH	7/13/98	
17.	KAB to contact Sam Heilman about rabbinic education research.	KAB	7/13/98	
18.	KAB to email Rachel Cowan for suggestions of researchers for CFWW.	KAB	7/13/98	

19.	All staff to respond to NR regarding publications for clippings coverage.	All staff	7/13/98	
20.	GZD to contact Ruth Pinkenson-Feldman for a copy of her proposal for JCCA early childhood center.	GZD	7/13/98	
21.	GZD to talk to KAB, PCH about Wendy Rosov and the Conference on Rabbinic Education.	GZD, KAB, PCH	7/6/98	
22.	NR to edit language of Guiding Principles following DNP's revisions.	NR	6/29/98	
23.	KAB to review and revise Guiding Principles for August staff retreat following revisions by DNP.	KAB	6/29/98	8/5/98
24.	NR, LM to discuss releasing map of existing change projects.	NR, LM	6/29/98	
25.	KJ to send resumes for executive assistant candidates to KAB.	KJ	6/29/98	
26.	KAB to develop chart relating R&D to workplan.	KAB	6/22/98	

CONFIDENTIAL – FINAL

MINUTES: CIJE STAFF TELECONFERENCE

DATE OF MEETING: July 27, 1998

DATE MINUTES ISSUED: August 26, 1998

PARTICIPANTS: Karen Barth (via telephone), Gail Dorph, Cippi Harte, Jessica Holstein (minutes), Karen Jacobson

CC: Pearl Beck, Sarah Feinberg, Adam Gamoran, Ellen Goldring, Alan Hoffmann, Barry Holtz, Elie Holzer, Lisa Malik, Mort Mandel, Dan Pekarsky, Lester Pollack, Nessa Rapoport, Susan Stodolsky, Leah Strigler, Furman Thomas, Chava Werber

I. Minutes

- July 20 staff meeting minutes and assignments reviewed, corrected, and accepted.

II. Staff Retreat

- Project templates for workplan discussion, assignments as follows:
 - JEWEL planning - GZD/EG
 - JEWEL pilot - GZD/EG
 - Forum - PCH
 - CFWW planning - KAB
 - Beit Rabban publication - NR
 - Policy Brief on Professional Development - NR
 - TEI (Cohort III, Evaluation, Video, Alumnae) - GZD
 - Indicators - AG
 - Conference on Rabbinic Education - PCH/KAB
 - Professors - BWH in transit
 - To be discussed: What is professors group?

Assignment: JSH to collect project templates for staff retreat.

- Schedule 9 am to 5 pm.
- Breakfast, lunch and light snacks to be served.

- Special food requests to KJ.
- 13 people confirmed – only DNP not attending.
- Agenda needed.
- Copies of last staff retreat minutes to be distributed.
- Support staff
 - SDF
 - Taking notes on laptop for JEWEL and workplan discussions.
 - Rachel
 - To clean up notes if necessary, time permitting before she leaves CIJE.
 - Will try to input tasks to project template software during staff retreat discussions, if possible.
- Staff meeting August 5 cancelled.
- Staff learning on teaching and learning – 45 minutes each day.
 - Day 1 - EH

Assignment: GZD to ask EH to lead staff learning at staff retreat on teaching and learning.

- Day 2 - BWH

Assignment: PCH to email BWH about doing staff learning at staff retreat on teaching and learning.

- UTS logistics
 - Phone in meeting rooms.
 - Fax, restrooms downstairs.
 - Outside eating area, weather permitting.

III. Early Childhood

- GZD met with Fran Jacobs in Boston.
- Need to gather more data before holding a consultation.
- Fran introduced GZD to Cindy Krug, potential researcher.

Assignment: KJ, GZD to discuss budget for Early Childhood.

IV. TEI Video

- Leah Strigler to work on TEI Video Project.
- One of Deborah Ball's graduate students to possibly work on TEI Video Project.

Assignment: KJ, GZD to discuss budget for TEI Video.

V. Rabbinic Education

- Wendy Rosov possible invitee to August 18 curriculum meeting, pending KAB conversation with Sam Heilman.

VI. CFWW

- Planning document from Nancy Raybin distributed to staff.
- Assignment: JSH to get clean copy from KAB of Nancy Raybin's CFWW Planning document, and distribute to staff and consultants.
- September 1 planning meeting
- December 31 target date for kick-off.
- Assignment: PCH to send candidate's name to Becky Klein for CFWW director position.

VII. JCCA

- Sector may ask us to help with some planning at JCCA.
- Planning position for Mandel Center for Jewish Education at JCCA – background/experience needed:
 - Planning
 - Jewish education
 - JCCs
- Assignment: GZD to find name of candidate for JCCA planning position.

VIII. Website

- Frame relay line installation – contract can be signed with KAB approval, installation within 6-8 weeks.
- Internet access – computers and network reconfigured, staff trained on new system.
- Document sharing software – can be installed and used before we have internet access.
- Listserves – automatic electronic subscription lists
- Website
 - Mark Rosenberg and SDF have started to lay out website, but designer is needed.
 - We need to decide where to host website
 - Shamash – Jewish internet service
 - Whirligig Studios – Mark Rosenberg
 - ATT
- Assignment: SDF to contact Aharon about Mandel Institute website and where it is hosted, domain name, linking our sites, etc.

IX. Filing System

- Survey of staff regarding filing system complete.
- Memo distributed with contents of new filing system.
- Files to be alphabetized and cross-referenced.
- Archives – probably should be stored off-site.

- Filing Day – to next staff meeting agenda.

X. Board Meeting

- KAB drafted letter regarding cancellation – to be sent out following approval of MLM, LP and Seymour Fox.

Assignment: GZD, PCH to cancel meetings in Milwaukee and Cleveland.

Assignment: KAB to call Esther Leah Ritz.

Assignment: GZD to email AG that board meeting is cancelled.

Assignment: JSH to check hotel reservations/cancellations for consultants.

Assignment: KJ to call John Colman to postpone audit committee meeting.

Assignment: KAB to reschedule audit committee meeting.

CONFIDENTIAL

CIJE ASSIGNMENTS

Staff Meeting Assignments July 27, 1998

NO.	DESCRIPTION	ASSIGNED TO	DATE ASSIGNED	DATE DUE
1.	JSH to collect project templates for staff retreat.	JSH	7/27/98	8/3/98
2.	GZD to ask EH to lead staff learning at staff retreat on teaching and learning.	GZD	7/27/98	
3.	PCH to email BWH about doing staff learning at staff retreat on teaching and learning.	PCH	7/27/98	
4.	KJ, GZD to discuss budget for Early Childhood.	KJ, GZD	7/27/98	
5.	KJ, GZD to discuss budget for TEI Video.	KJ, GZD	7/27/98	
6.	JSH to get clean copy from KAB of Nancy Raybin's CFWW Planning document.	JSH	7/27/98	
7.	PCH to send candidate's name to Becky Klein for CFWW director position.	PCH	7/27/98	
8.	GZD to find name of candidate for JCCA planning position.	GZD	7/27/98	
9.	SDF to contact Aharon about Mandel Institute website and where it is hosted, domain name, linking our sites, etc.	SDF	7/27/98	
10.	GZD, PCH to cancel meetings in Milwaukee and Cleveland.	GZD	7/27/98	
11.	KAB to call Esther Leah Ritz.	KAB	7/27/98	
12.	GZD to email AG that board meeting is cancelled.	GZD	7/27/98	
13.	JSH to check hotel reservations/cancellations for consultants.	JSH	7/27/98	
14.	KJ to call John Colman to postpone audit committee meeting.	KJ	7/27/98	
15.	KAB to reschedule audit committee meeting.	KAB	7/27/98	
16.	PCH to follow up with Nancy Raybin regarding meeting Lisa Kohn.	PCH	7/20/98	
17.	KAB to contact LM about Liz Lazaroff.	KAB	7/20/98	
18.	NR to edit 2-sentence bios from staff and forward to Mandel Institute.	NR	7/20/98	7/24/98
19.	GZD to distribute to staff materials from Mary Diez.	GZD	7/13/98	

20.	GZD to discuss with Mary Diez goals for August 17 consultation.	GZD	7/13/98	
21.	SDF to write memo to KAB on internet issues with list of tasks to be done, timeline and individuals responsible.	SDF	7/13/98	
22.	BWH to email SS for final version of Professors evaluation.	BWH	7/13/98	
23.	KAB to contact Sam Heilman about rabbinic education research.	KAB	7/13/98	
24.	KAB to email Rachel Cowan for suggestions of researchers for CFWW.	KAB	7/13/98	
25.	All staff to respond to NR regarding publications for clippings coverage.	All staff	7/13/98	
26.	GZD to contact Ruth Pinkenson-Feldman for a copy of her proposal for JCCA early childhood center.	GZD	7/13/98	
27.	GZD to talk to KAB, PCH about Wendy Rosov and the Conference on Rabbinic Education.	GZD, KAB, PCH	7/6/98	
28.	NR to edit language of Guiding Principles following DNP's revisions.	NR	6/29/98	
29.	NR, LM to discuss releasing map of existing change projects.	NR, LM	6/29/98	
30.	KAB to develop chart relating R&D to workplan.	KAB	6/22/98	

CONFIDENTIAL

MINUTES: CIJE STAFF TELECONFERENCE

DATE OF MEETING: August 17, 1998

DATE MINUTES ISSUED: September 25, 1998

PARTICIPANTS: Karen Barth, Gail Dorph, Ellen Goldring, Cippi Harte, Jessica Holstein (minutes), Barry Holtz, Karen Jacobson, Leah Strigler

CC: Pearl Beck, William Crow, Sarah Feinberg, Adam Gamoran, Alan Hoffmann, Elie Holzer, Lisa Malik, Mort Mandel, Dan Pekarsky, Lester Pollack, Nessa Rapoport, Susan Stodolsky, Furman Thomas

I. Staff Learning

GZD led staff learning with the story "If Not Higher," by I.L. Peretz.

II. Minutes

July 27 staff meeting minutes and assignments were reviewed, corrected and accepted.

III. Executive Director's Report

A. Sector

- KAB and some senior staff invited to a meeting in Israel in mid-September to discuss Sector strategy.

B. CFWW

- Director search
 - KAB met with Becky Klein from Phillip Oppenheim.
 - There are good candidates for consulting network.
 - KAB to meet with a possible candidate for director position.
- KAB to meet all day September 1-2 with Nancy Raybin regarding planning.
- Looking to have researcher on board by then to do interviews and data collection, preferably someone with consulting experience.

C. Intern for Special Projects

- Amy Amiel – possible part-time position.

D. NJPS

- KAB met with Bethamie Horowitz regarding NJPS.
- Writing of monograph analyzing issues related to Jewish Education to be included in project.
- Email to professors group when concept and purpose are clearer.

Assignment: Executive Assistant to schedule 1 hour teleconference with KAB, AG, EG, Bethamie Horowitz to discuss NJPS monograph.

Assignment: KAB to speak to Jim Schwartz about NJPS monograph.

IV. Assistant Director's Report

A. Audit Committee

- Audit committee met.

B. Support Staff Hiring

- William Crow hired part-time, 3 days a week.
- HR position – hoping to make offer today.
- GZD assistant – one candidate pending.

C. New Senior Staff

- Welcome to Elie Holzer (EH) and Leah Strigler (LZS).

Assignment: KJ to make sure new phone lists are distributed.

V. Updates

A. Technology

- We are comparing ATT and Uunet for 56k line installation.
- Website on hold.
- SDF recommends setting up listservs through Shamash using Mark Rosenberg's expertise.
- Meeting to be set up about educational technology (interfacing website, distance learning, etc.)

Assignment: KAB to meet with SDF, KJ, Mark Rosenberg, CGS, Uunet.

B. Early Childhood

- More data-gathering to be done rather than holding consultation at this point.
- Fran Jacobs has researcher candidate.
- Project could be funneled through Elliot Pearson School at Tufts.

C. TEI Videotape Project

- September 27-28 consultation.
- Working on project are LZS, Jenny Lewis (Deborah Ball's PhD candidate), SDF, new support person.
- All taped materials to be gathered by June 1999.
- 2-3 packages to be put out including one class-based and one on mentoring.

D. Synagogue Change

- August 4 leadership team meeting – meeting was well-attended.
- LM distributed map of synagogue change projects.
- Conceptual model for research started to emerge.

E. Indicators Project

- KAB met with AG, EG, Steve Cohen, Bethamie Horowitz in Israel.
- Steve Cohen is putting together proposal to develop literacy instrument using existing database of Jewish households.
- Bethamie Horowitz hired to write paper on developing indicators for identity.

F. HaSha'ar

- Unique opportunity for CIJE to learn about:
 - Use of Jewish texts in educating others
 - Issues of limiting, expanding and distorting text for educational purposes.
- To be discussed further in Leadership Study Group.
- HaSha'ar good site to study these issues
- Will inform work of JEWEL.

G. Filing Day

- Lead Community and Goals Project materials to be archived.
- Project managers to keep personal notes and last 3 years of materials.
- 1 set of all materials to be archived and materials to be described.
- Support and senior staff to be meet at 10:30 am on Filing Day.
- Lunch to be provided.

VI. In-Depth Discussions

A. JEWEL Pilot Project Management Template

- GANT chart for JEWEL reviewed, cover page for milestones needed.
- Work done on break-out of sub-tasks.
- Leadership team to work on and revise GANT chart and lay out dates of meetings for next 4-5 months.

VII. Scheduling

- August 18, 8:00 am – KAB, GZD, EG to meet regarding JEWEL Planning
- August 26 – KAB to meet with Seymour Fox, Annette Hochstein in Cleveland
- September 3 – KAB, PCH to Baltimore
- September 3-15 – LZS in Israel
- September 7 – project templates due, staff time allocation due

Assignment: KJ to email staff, consultants that project templates, staff time allocations due September 7.

- September 9 – GZD, Sharon Feiman-Nemser to University of Wisconsin meeting
- September 15 – Project management meeting cancelled

Assignment: KJ to assign support staff to prepare GANT charts in Microsoft Project for workplan projects.

Assignment: KAB to clarify October CIJE Board Meeting with Seymour Fox.

VIII. Parking Lot

- JCCA Planning → August 31 agenda
- NJPS Monograph → August 24 agenda

CONFIDENTIAL

CIJE ASSIGNMENTS

Staff Meeting Assignments August 17, 1998

NO.	DESCRIPTION	ASSIGNED TO	DATE ASSIGNED	DATE DUE
1.	Executive Assistant to schedule 1 hour teleconference with KAB, AG, EG, Bethamie Horowitz to discuss NJPS monograph.	Exec. Assistant	8/17/98	
2.	KAB to speak to Jim Schwartz about NJPS monograph.	KAB	8/17/98	
3.	KJ to make sure new phone lists are distributed.	KJ	8/17/98	
4.	KAB to meet with SDF, KJ, Mark Rosenberg, CGS, Uunet.	KAB, SDF, KJ	8/17/98	
5.	KJ to email staff, consultants that project templates, staff time allocations due September 7.	KJ	8/17/98	
6.	KJ to assign support staff to prepare GANT charts in Microsoft Project for workplan projects.	KJ	8/17/98	
7.	KAB to clarify October CIJE Board Meeting with Seymour Fox.	KAB	8/17/98	
8.	SDF to contact Aharon about Mandel Institute website and where it is hosted, domain name, linking our sites, etc.	SDF	7/27/98	
9.	KAB to contact LM about Liz Lazaroff.	KAB	7/20/98	
10.	KAB to email Rachel Cowan for suggestions of researchers for CFWW.	KAB	7/13/98	
11.	All staff to respond to NR regarding publications for clippings coverage.	All staff	7/13/98	
12.	GZD to contact Ruth Pinkenson-Feldman for a copy of her proposal for JCCA early childhood center.	GZD	7/13/98	
13.	NR to edit language of Guiding Principles following DNP's revisions.	NR	6/29/98	
14.	NR, LM to discuss releasing map of existing change projects.	NR, LM	6/29/98	

CONFIDENTIAL

MINUTES: CIJE STAFF MEETING

DATE OF MEETING: August 31, 1998

DATE MINUTES ISSUED: October 19, 1998

PARTICIPANTS: Karen Barth, Cippi Harte, Jessica Holstein (minutes), Barry Holtz, Karen Jacobson, Leah Strigler

CC: William Crow, Gail Dorph, Sarah Feinberg, Adam Gamoran, Ellen Goldring, Elie Holzer, Dan Pekarsky, Nessa Rapoport, Susan Stodolsky, Furman Thomas

I. Staff Learning

- BWH led staff learning with an article from the AJS Review on the structure of the *kiddush* for Shabbat and remembrance of the exodus from Egypt versus remembrance of creation.

II. Minutes

- August 17 minutes and assignments were reviewed, corrected and accepted.

III. Executive Director's Report

A. Sector

- Discussion of travel to Israel for sector meeting.

Assignment: PCH to contact Suzannah in Seymour Fox's office regarding hotel accommodations for sector meeting.

- Separate budget for sector.
- KAB reported on meeting in Cleveland with Seymour Fox and Annette Hochstein.

B. Mandel Institute Progress Report November-April 1998 distributed.

C. Summary of JESNA Jewish Identity Action Project distributed.

Assignment: JSH to distribute Mandel Institute and JESNA documents to NR, EH, GZD.

IV. Assistant Director's Report

- CIJE Friday closing at 2 pm when Daylight Savings Time begins.

V. In-Depth Discussions

A. Workplan Follow-up

- JEWEL Pilot and JEWEL Planning discussed.
- Cost for all projects except JEWEL Pilot, JEWEL Planning, Forum, Field Sites discussed, excluding salary and benefits.

Assignment: KAB to discuss outside grant for High School Leaders with DNP.

Assignment: KJ to check on HaSha'ar reimbursement to CIJE.

Assignment: KAB to prepare template package.

VI. Scheduling

- September 10, 12-2 pm – Conference on Rabbinic Education curriculum meeting
- September 23, 9am-1pm – Conference on Rabbinic Education research meeting

Assignment: JSH to contact Wendy Rosov regarding participation in Conference on Rabbinic Education meeting on September 10 and 23.

- October 14 – TEI Video consultation
- October 15 – KAB, GZD to Cummings Board Meeting, Chicago
- October 26-27 – JEWEL Planning meeting

CONFIDENTIAL

CIJE ASSIGNMENTS

Staff Meeting Assignments August 31, 1998

NO.	DESCRIPTION	ASSIGNED TO	DATE ASSIGNED	DATE DUE
1.	JSH to distribute Mandel Institute and JESNA documents to NR, EH, GZD.	JSH	8/31/98	
2.	KAB to discuss outside grant for High School Leaders with DNP.	KAB	8/31/98	
3.	KJ to check on HaSha'ar reimbursement to CIJE.	KJ	8/31/98	
4.	JSH to contact Wendy Rosov regarding participation in Conference on Rabbinic Education meeting on September 10 and 23.	JSH	8/31/98	
5.	KAB to prepare template package.	KAB	8/31/98	
6.	KAB to speak to Jim Schwartz about NJPS monograph.	KAB	8/17/98	
7.	KJ to make sure new phone lists are distributed.	KJ	8/17/98	
8.	KJ to email staff, consultants that project templates, staff time allocations due September 7.	KJ	8/17/98	
9.	KJ to assign support staff to prepare GANT charts in Microsoft Project for workplan projects.	KJ	8/17/98	
10.	KAB to clarify October CIJE Board Meeting with Seymour Fox.	KAB	8/17/98	
11.	SDF to contact Aharon about Mandel Institute website and where it is hosted, domain name, linking our sites, etc.	SDF	7/27/98	
12.	KAB to contact LM about Liz Lazaroff.	KAB	7/20/98	
13.	KAB to email Rachel Cowan for suggestions of researchers for CFWW.	KAB	7/13/98	
14.	All staff to respond to NR regarding publications for clippings coverage.	All staff	7/13/98	
15.	NR, LM to discuss releasing map of existing change projects.	NR, LM	6/29/98	

CONFIDENTIAL

STAFF MEETING MINUTES

DATE OF MEETING: October 1, 1998

DATE MINUTES ISSUED: October 22, 1998

PARTICIPANTS: Karen Barth, Gail Dorph, Cippi Harte, Jessica Holstein (minutes), Barry Holtz, Elie Holzer, Karen Jacobson, Nessa Rapoport, Leah Strigler

CC: William Crow, Sarah Feinberg, Adam Gamoran, Ellen Goldring, Dan Pekarsky, Susan Stodolsky, Furman Thomas

I. Staff Learning

- NR led staff learning on memory and love with sources from the Rosh Hashanah Mussaf service, Yom Kippur Haftarah reading and "Cambridge Elegy" by Sharon Olds.

II. Minutes

- August 17 minutes and assignments were reviewed, corrected and accepted.

III. Assistant Director's Report

A. Technology

- 56K line is installed.
- Development of database is moving forward.
- Computer problems should be reported to FDT in writing.

B. Staffing

- Controller – Bernard Mayers hired as a consultant to work on budget projections for this year.
- HR Assistant – Maria Cruz hired as of September 1998.
- Executive Director's Assistant – Elizabeth Block temping.

C. Door Sign

- Mandel Foundation to be added to sign on office door.

IV. Executive Director's Report

A. Sector

- Seymour Fox (SF) asked that we send out a letter regarding foundation changes to the main CIJE contacts.

Assignment: KAB, NR to develop mailing list of 100 most important CIJE contacts.

Assignment: KJ to discuss foundation changes with support staff.

- PCH and Dina Roemer at the Mandel Institute are working together on videoconferencing capabilities.

B. Jewish Funders Network

- We have been asked to help organize a 1-day conference next year for the Jewish Education Affinity Group.

C. Mandel Consulting Group

- Planning team – KAB, Nancy Raybin, Lisa Kohn
- Started project interviewing of potential clients, consultants and people who have developed consulting networks.

D. HUC

- Meeting held in Chicago - first time with KAB as facilitator of planning meeting on curriculum.

E. NJPS

- Letter has been sent to Jim Schwartz with questions to be included in NJPS.

Assignment: KAB to give copies to staff of letter to Jim Schwartz regarding NJPS.

F. Conference on Rabbinic Education

- Wendy Rosov working full-time through December 1998 on research and program development.
- Curriculum and research are being developed, copies to be given to staff.
- Conference to be held February 7-9, 1999.

Assignment: JSH to prepare budget for Conference on Rabbinic Education.

IV. In-Depth Opportunities

A. Workplan and Budget discussion

V. Updates

A. Staff Meeting Notes

- Shorter, bulleted format needed.
- To be for internal office use.

B. NJPS Monograph

- To be co-published CJF/Mandel.

- Data to be collected in 2000.
- Writer needed with background in research data analysis - possibly send note to professors group for their suggestions.

VII. Parking Lot

- Friday closing – to next agenda
- October board meeting

Assignment: KJ to send letter to board regarding October board meeting cancellation.

CONFIDENTIAL

STAFF MEETING ASSIGNMENTS
October 1, 1998

NO.	DESCRIPTION	ASSIGNED TO	DATE ASSIGNED	DATE DUE
1.	KAB, NR to develop mailing list of 100 most important CIJE contacts.	KAB, NR	10/1/98	
2.	KJ to discuss foundation changes with support staff.	KJ	10/1/98	
3.	KAB to give copies to staff of letter to Jim Schwartz regarding NJPS.	KAB	10/1/98	
4.	JSH to prepare budget for Conference on Rabbinic Education.	JSH	10/1/98	
5.	KJ to send letter to board regarding October board meeting cancellation.	KJ	10/1/98	
6.	KAB to discuss outside grant for High School Leaders with DNP.	KAB	8/31/98	
7.	KJ to follow up on reimbursement from HaSha'ar.	KJ	8/31/98	
8.	KAB to speak to Jim Schwartz about NJPS monograph.	KAB	8/17/98	
9.	KJ to make sure new phone lists are distributed.	KJ	8/17/98	
10.	All staff to respond to NR regarding publications for clippings coverage.	All staff	7/13/98	

CONFIDENTIAL

STAFF MEETING MINUTES

DATE OF MEETING: October 21, 1998

DATE MINUTES ISSUED: December 3, 1998

PARTICIPANTS: Karen Barth, Gail Dorph, Jessica Holstein (minutes), Barry Holtz, Elie Holzer, Karen Jacobson, Nessa Rapoport, Leah Strigler

CC: William Crow, Sarah Feinberg, Adam Gamoran, Ellen Goldring, Cippi Harte, Dan Pekarsky, Susan Stodolsky, Furman Thomas

I. Minutes

- October 1 minutes and assignments were reviewed, corrected and accepted.

II. Assistant Director's Report

A. Organization Name Change

- Signage – “Mandel Foundation” has been added to our door sign, and will be added shortly to the building directory and the sign by 18th floor elevator.
- Legal issues
 - We are operating as “Mandel Foundation.”
 - CIJE to exist as a 501C3 for next few months – Acknowledgement letters for grants received in this period must be on CIJE letterhead.
- Accounting issues
 - KJ, Bernie Mayers, Bob Dietz, Estelle Alberg-Kapland (Mandel Foundation in Israel) met via teleconference regarding synchronizing financial reports for Foundation.
 - Estelle will be here November 23-25 for discussions on systems for bookkeeping and payables, and to share with us their guidelines for internal controls.

B. Support Staff Hiring

- Temp – Clara was interviewed prior to hiring, and will work with LM, DNP and NR.
- GZD Assistant – We are in the process of hiring an assistant to work with GZD, BWH, EH and LZS.
- CW – working with DNP.

C. Technology

- 56K line is down, and Uunet and Bell Atlantic are looking into the problem.
- Website

Assignment: NR to discuss website with Annette Hochstein.

D. Timesheets

Assignment: KAB, Bernie Mayers to develop new categories for time allocation sheets and distribute to staff.

Assignment: All staff to estimate time allocation year-to-date.

III. Executive Director's Report

A. Conference on Rabbinic Education

- Draft program is being developed.
- Planning meeting with heads of rabbinical schools to be held on October 29.

B. Mandel Consulting Group

- Planning process is moving ahead with a market research project on the demand for consulting in the Jewish world.

C. HUC

- Consulting project is going very well.

D. Temple Israel, Palm Beach

- Rabbi Shapiro has asked us for help in developing a new educational program.

E. Baltimore Lay Leadership Project

- Lee Hendler is interested in moving ahead with this project.

IV. Updates

A. Publications

- Staff is encouraged to take publications with them to any conferences or large meetings they attend.

B. Clippings Coverage

- When distributing articles, staff should please indicate who is distributing the article.

Assignment: All staff to submit revisions to draft list of publications to be covered.

C. Jerusalem Fellows/Melton Senior Educators Recruiting

- Jerusalem Fellows and Melton Senior Educators have overlap of faculty and recruitment pools.
- Jerusalem Fellows to share 50% of LZS's time with Melton Senior Educators.
- Jerusalem Fellows to bill Melton for costs.
- LZS will also recruit for Mandel/Melton Doctoral Fellowships at Hebrew University.
- LZD to meet with central organizations about recruiting.

D. Friday Closing Time

- Proposal to change Friday closing time to 2 pm at Rosh Hashanah time rather than when clocks change to Daylight Savings.

V. In-Depth Discussions

- Workplan discussion

VI. Parking Lot

- Meeting times
- Sector letter(s)

CONFIDENTIAL

**STAFF MEETING
Assignments October 21, 1998**

NO.	DESCRIPTION	ASSIGNED TO	DATE ASSIGNED	DATE DUE
1.	KAB, Bernie Mayers to develop new categories for time allocation sheets and distribute to staff.	KAB, Bernie	10/21/98	10/21/98
2.	All staff to estimate time allocation year-to-date.	All staff	10/21/98	10/23/98
3.	All staff to submit revisions to draft list of publications to be covered.	All staff	10/21/98	10/26/98
4.	KAB, NR to develop mailing list of 100 most important CIJE contacts.	KAB, NR	10/1/98	
5.	KAB to give copies to staff of letter to Jim Schwartz regarding NJPS.	KAB	10/1/98	
6.	JSH to prepare budget for Conference on Rabbinic Education.	JSH	10/1/98	

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STAFF MEETING MINUTES

DATE OF MEETING: October 29, 1998

DATE MINUTES ISSUED: December 3, 1998

PARTICIPANTS: Karen Barth, Gail Dorph, Cippi Harte, Jessica Holstein (minutes), Barry Holtz, Elie Holzer, Karen Jacobson, Nessa Rapoport

CC: William Crow, Sarah Feinberg, Adam Gamoran, Ellen Goldring, Dan Pekarsky, Susan Stodolsky, Leah Strigler

I. Assistant Director's Report

A. Accounting

- Bernie is putting together projected spending for the remainder of 1998 by the end of the day today.

Assignment: All staff to submit estimated costs for the rest of 1998 to Bernie by 12 noon, today, October 29.

B. Consultants

- All salary and payment commitments must be discussed with KJ first.

C. Copying

- All large copying jobs to Alpina must be pre-approved by KJ.
- Photocopier will be fixed by the end of the day today, October 29.

D. Publications

- Articles distributed should be copied to support staff for their information.

E. Phone Logs

- International calls, teleconferences and long distance calls over 20 minutes should be logged with project codes and given to FDT.

F. Time Allocation

- Time allocation categories for remainder of 1998 were discussed.
- KJ to report to staff all information on time allocation already submitted and recorded.

Assignment: All staff to submit time allocations by Monday, November 2.

G. Flex-spending/Vacation

- Flex-spending and vacation reports to be distributed.
- Staff is reminded to use remaining flex-spending and vacation by end of 1998.

II. Updates

A. Study Group Schedule

- Schedule planned through end of June 1999, Thursdays 9:30-11:00 am.
- Next meeting November 4, 9:30-11:00 am.
- Group includes GZD, EG, PCH, BWH, EH, NR, DNP.
- Proposal to hold staff meetings on Thursdays, 11:00 am-1:00 pm, following the study group.

III. In-Depth Discussions

A. Workplan

- 1999 draft workplan proposal was discussed, and suggested revisions were made.
- List of appendices to be added:
 - Professors and their institutional affiliations
 - TEI participants and their positions and communities
 - National data sets
 - TEI Evaluation summary

Assignment: GZD to email SS to have Renee Wohl write one-page, bulleted summary of TEI Evaluation.

B. Baltimore Lay Leaders

- KAB has the budget for the program.

Assignment: BWH to draft proposal for Baltimore Lay Leaders program.

Assignment: NR to give BWH materials from Milwaukee for Baltimore Lay Leadership program.

C. Professors

- Next retreat proposed for January on the west coast or in Florida.
- Suggestion to possibly coordinate with Seymour Fox's and Annette Hochstein's visit to US.

Assignment: BWH to call professors on the west coast and email other professors regarding possible January retreat and to poll regarding having retreat over Shabbat.

- Questions for future discussion:
 - How to recruit new members to group?
 - What else (other than retreats) to do with professors?

IV. Scheduling/Calendar

- November 21, 2-4 pm Staff Meeting
- December 9, 10 am-4:30 pm Mandel Consulting Group planning meeting
- January 17-20 TEI
- January 31-February 1 Continuity Conference
- February 7-9 Conference on Rabbinic Education
- March 7-9 TEA

V. Parking Lot

- Name change → in-depth opportunity on next agenda
- Friday closing → next agenda
- Visa card to code expenses → next agenda
- Flex-spending → next agenda
- Vacation → next agenda
- Staff meeting transition → next agenda
- Education Study Group → next agenda

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**STAFF MEETING
Assignments October 29, 1998**

NO.	DESCRIPTION	ASSIGNED TO	DATE ASSIGNED	DATE DUE
1.	All staff to submit estimated costs for the rest of 1998 to Bernie by 12 noon, today, October 29.	All staff	10/29/98	10/29/98
2.	All staff to submit time allocations by Monday, November 2.	All staff	10/29/98	11/2/98
3.	GZD to email SS to have Renee Wohl write one-page, bulleted summary of TEI Evaluation.	GZD	10/29/98	ASAP
4.	BWH to draft proposal for Baltimore Lay Leaders program.	BWH	10/29/98	
5.	NR to give BWH materials from Milwaukee for Baltimore Lay Leadership program.	NR	10/29/98	
6.	BWH to call professors on the west coast and email other professors regarding possible January retreat and to poll regarding having retreat over Shabbat.	BWH	10/29/98	
7.	All staff to estimate time allocation year-to-date.	All staff	10/21/98	10/23/98
8.	KAB to give copies to staff of letter to Jim Schwartz regarding NJPS.	KAB	10/1/98	
9.	JSH to prepare budget for Conference on Rabbinic Education.	JSH	10/1/98	

CONFIDENTIAL

STAFF MEETING MINUTES

DATE OF MEETING: November 3, 1998

DATE MINUTES ISSUED: December 3, 1998

PARTICIPANTS: Karen Bartb, Gail Dorph, Cippi Harte (minutes), Elie Holzer, Karen Jacobson, Nessa Rapoport, Leah Strigler

CC: William Crow, Sarah Feinberg, Adam Gamoran, Ellen Goldring, Jessica Holstein, Barry Holtz, Dan Pekarsky, Susan Stodolsky, Furman Thomas

I. Israel Trip

- MLM is speaking at the GA, Tuesday morning, November 17
- GZD, PCH will be at the World Conference of Jewish Communal Service and the GA.

Assignment: PCH to set up meeting with Dina Roemer regarding videoconferencing for Israel and North America.

II. Mandel Foundation Board Meeting

- KAB described her presentation to the Mandel Foundation board and asked for staff input:
 - Consulting group including:
 - Conference on Rabbinic Education
 - Data gathering and interviews for consulting group
 - Synagogue Change Research
 - TEI
 - Professors
 - Goals and vision

III. Lilly Foundation/NCSY

- Lilly Foundation has provided a grant to NCSY.
- Report of the project related to youth at risk to be presented in New York on November 11. EH to attend.

Assignment: EH to ask BWH if he is available to attend NCSY conference on November 11.

IV. Workplan & Budget

- Workplan issues to be reviewed at next staff meeting.
- KAB will distribute list of projects with staff assignments for next year.

Assignment: All staff to review list of projects and staff assignments on workplan for next year and submit any problems to KAB.

- 1999 budget was developed for the workplan.

V. Support Staff

- Roles and responsibilities for support staff were discussed.
- KJ will meet with support staff to brief them.

VI. Researchers

- PB and SG to attend a staff meeting to report on the process of their projects.

VII. Scheduling

- December 7 – Indicator meeting (KAB, AG, EG) – CJF Continuity Conference to be on the agenda
- Study Group – list of dates was distributed.

VIII. Parking Lot

- Israel trip debrief → December 2 agenda
- Professors → Future agenda
- Baltimore Lay Leaders → future agenda
- NJPS Monograph → future agenda
- Education Study Group → future agenda
- Workplan issues → next agenda

CONFIDENTIAL

**STAFF MEETING
Assignments November 3, 1998**

NO.	DESCRIPTION	ASSIGNED TO	DATE ASSIGNED	DATE DUE
1.	PCH to set up meeting with Dina Roemer regarding videoconferencing for Israel and North America.	PCH	11/3/98	
2.	EH to ask BWH if he is available to attend NCSY conference on November 11.	EH	11/3/98	
3.	All staff to review list of projects and staff assignments on workplan for next year and submit any problems to KAB.	All staff	11/3/98	
4.	All staff to submit estimated costs for the rest of 1998 to Bernie by 12 noon. today, October 29.	All staff	10/29/98	10/29/98
5.	All staff to submit time allocations by Monday, November 2.	All staff	10/29/98	11/2/98
6.	GZD to email SS to have Renee Wohl write one-page, bulleted summary of TEI Evaluation.	GZD	10/29/98	ASAP
7.	NR to give BWH materials from Milwaukee for Baltimore Lay Leadership program.	NR	10/29/98	
8.	BWH to call professors on the west coast and email other professors regarding possible January retreat and to poll regarding having retreat over Shabbat.	BWH	10/29/98	
9.	All staff to estimate time allocation year-to-date.	All staff	10/21/98	10/23/98
10.	KAB to give copies to staff of letter to Jim Schwartz regarding NJPS.	KAB	10/1/98	
11.	JSH to prepare budget for Conference on Rabbinic Education.	JSH	10/1/98	

From The Jewish Week August 21, 1998

FALL EDUCATION

Jewish Education Gets A Chair

Brandeis is first secular university to create such post.

STEVE LIPMAN
STAFF WRITER

Jewish education will itself become the subject of education at a Jewish university next year — for the first time at a nonsectarian institution of higher learning in North America.

A new Chair in Jewish Education will begin in September 1999 at Brandeis University, a nonsectarian school in Waltham, Mass., President Jehuda Reinharz recently announced. "This is a big step," Reinharz said.

The holder of the academic chair will be a professor to be chosen during an international search that begins this month, Reinharz said.

The announcement follows a two-year university self-study.

The person selected will teach a curriculum at the undergraduate and graduate levels about Jewish education, which previously has been taught as a separate subject only at rabbinical seminaries in the United States.

The professorship marks an attempt to strengthen Jewish education, which is recognized as "the key to continuity and survival" of the American Jewish community, Reinharz said.

Funded by the Mandel family of Cleveland, for whom the chair will be named, the

Brandeis initiative has "both symbolic and practical significance," he said. "We want it to develop into a major ... think tank and academic center of the American Jewish community." The chair's specific academic orientation and communal activities will depend on the holder's background.

"Given the fact that one of Brandeis' missions is service to the Jewish community, I fully intend that the person who fills this chair will play a major role in improving Jewish education at all levels in North America, and will collaborate with Jewish institutions in Israel and around the world," Reinharz said.

Brandeis, which is celebrating its 50th year, has a student body of 4,000. Its search committee for the professorship is headed by Jonathan Sarna, professor of American Jewish history.

The \$2.5 million gift for the chair is funded equally by the Jack N. and Lilyan Mandel Foundation, the Joseph and Florence Mandel Family Foundation, and the Morton and Barbara Mandel Family Foundation. □



Jehuda Reinharz:
Jewish education is
"the key to continuity
and survival."

**NOTES FROM CIJE SYNAGOGUE CHANGE RESEARCH
TELECONFERENCE**

Friday, October 23, 1998

Time: 10 – 11 a.m.

Notes taken by Carla Sterling

Participants

Lisa Malik – meeting facilitator

Pearl Beck

Bill Firestone

Adam Gamoran

Ellen Goldring

Simone Schweber

Susan Stodolsky

Lisa announced that since the first draft of the proposal was written on March 31st, there has been a lot of input on the study and the team is ready to move ahead to Phase Three. Phases One and Two were completed and the team is now editing the map.

TO FOLLOW-UP. Lisa made a request for additional researchers for the project, who would be required to work approximately two days per week between December and April.

MAIN ISSUE TO FINALIZE: SITE SELECTION

Reference was made to page three of the 3/31/98 Research Proposal relating to *Site Selection*.

Question: Have the researchers observed first-hand what is going on in each site? There is a concern that people will want to put the best information forward.

Lisa's Response: Interviews were done with leaders of the change projects. The team hasn't yet gone into synagogues. The team needs to speak with rabbis, presidents, lay leaders, etc., including some individuals in the 'loyal opposition'.

Question: What is the strategy being used?

Lisa's Response: The following steps were cited: Step One: Proposal was written; Step Two: Feedback was gathered.

Some Views on Studying Successful Change in Urban High Schools:

1. It is important to look at examples of successful as well as unsuccessful sites.
2. Weakness of just studying successful sites: They may provide a model of how to get there, but they don't reveal the many problems involved in getting there.

Question: What about selecting successful synagogues on the basis of an independent vs. a dependent variable?

Responses:

1. Use a "dependent variable" (success) with variation in the sample (i.e. some successful and some unsuccessful synagogues).

Concern: It's still a descriptive study, not a statistical deductive study.

2. Perhaps site selection should be guided by the categories of the map that were created in Phase One. For example, one could look at the different "Points of Entry" of synagogue change projects [For example: programming, planning process, and people/(leadership development, hiring & training of new staff, etc.)]. Alternatively, one could pick some synagogues in change projects that are more driven by content and others in projects that are more process-oriented.

Political Issue Leaders of umbrella change projects may not be willing to give the names of unsuccessful synagogues.

Suggestion. Look at cases of different types of change projects. When you pick sites on the basis of some typology, there will be variability in the outcome (success). This approach will only work when one has some theory of what a good change process is. The burden of this type of approach is to conceptualize a theory about what change brings on a particular type of success; then pick sites of places that are doing that.

Question: Are we defining success without the specific goals of the institutions involved?

Responses: 1. One of our research questions is "what are the different definitions of success?"
 2. One of our definitions of success is "fidelity to institution's and change project's own definitions of success" (a la Larry Cuban).

Current Typology Based on Pearl's suggestion, there could be several grids. For e.g.:

1. One grid could look at Points of Entry; [e.g. programming, planning process, and people (leadership development, hiring & training of new staff, etc.)].
2. A second grid could look at Areas of Focus of synagogue change projects, (e.g. education, prayer services, healing, ambience, leadership, outreach, etc.)

Issue: Many change projects are focused on education, few deal with prayer, social action is not really a focus. This typology may not be as clear-cut as the first typology

3. A third grid could look at Sponsoring Agencies – national, regional, etc.

Comment: sponsoring agency may not be as useful for site selection purposes as the other two grids.

Question: What happened to the original typology on the grid sent to the participants in the August 4 Leadership Team Meeting? (holistic change in synagogues, holistic change in schools, and targeted programming in synagogues or schools.)

Response: For some synagogue change projects classified as "targeted programming", umbrella change project leaders claimed that their projects were holistic. Some projects provide grants to synagogues, so while some synagogues may seem very targeted, the umbrella projects may be holistic. This is a politically dangerous typology to use.

Suggestion: Develop a typology whose categories don't overlap too much.

Issue: Should we select sites based on "Successful" vs. "Unsuccessful"?

Suggestions: There must be variations of success in the sample. However, we shouldn't select sites based on "successful" vs. "unsuccessful". (for reasons of politics, bias, etc.). The most important thing to vary on is the type of change project. If we vary on change project, we will undoubtedly end up with variations on the success outcome. We should end up with some successful and some unsuccessful synagogues.

We could do something like a "greedy search algorithm" for site selection: Go through each level of sampling (one variable at a time); then do purposeful additions and subtractions with secondary and tertiary variables. Start by drawing a sample on the most critical variables. The most important thing to vary on is the type of change project, (e.g. "Points of Entry" or a revised version of "Areas of Focus"). Other variables which should enter into the site selection strategy are "size" and "movement" of synagogues. The variable "geography" is not as important. This can be placed lower down on the list. One should not study synagogues just starting change projects this year.

Our Definitions of Success: Issue: Perhaps we should include "pervasiveness" as one of our internal definitions of success - i.e., are any of these projects pervasive throughout schools or synagogues? Is this a function of size? Depending on budget constraints, we might consider sending an institutional survey to congregants to get a measure of pervasiveness.

Issue: Selecting Sites based on Independent Variables?

While it makes sense to select sites based on independent variables (and see how different sites with different levels of the independent variable vary on the dependent variable "success"), this strategy is impractical for this study since there are so many independent variables to consider.

ISSUES RELATED TO RESEARCH QUESTION #FOUR (Factors linked to Success)--Should we focus on a few hunches identified in Phase One (map) or should we have more of an open-ended approach?

Proposed Strategy:

1. Keep in mind that this is not a survey in interview format. Use a case study approach.
2. Sort through the four pages of hunches from Phase One and develop a list of a few key hunches. We could potentially focus on hunches which might be most enlightening and/or focus on areas of disagreement.
3. Develop a "site visit guide" with a checklist to ensure that researchers get information on each item identified.
4. The site visit guide's checklist should include topics to be covered during the interview and observation. ("Before you leave, make sure you've covered these topics").

DECISIONS REACHED

1. Don't select all "successful" synagogues.

Reasons:

- need "unsuccessful" as well as "successful" synagogues in order to understand which factors are linked to "success"
- may not have any cases of "success" yet (because it may be too early in the change process)

2. Don't use "successful" as a primary site selection criterion.

Reasons:

- political issue involved in asking umbrella change project leaders to identify "unsuccessful" synagogues
- potential bias in asking umbrella change project leaders to identify "successful" and "unsuccessful" synagogues (due to blurring of lines between definitions of success and factors linked to success)

3. Use "points of entry" or other typology of synagogue change projects as the primary criterion for site selection. "Size" and "movement" can be secondary criteria (similar to "greedy search algorithm").
4. Use a case study approach, not a survey in interview format.
5. Use a site visit guide with a checklist to focus on a few key factors, but go into the field research with an open mind.
6. Focus more on "What's the story of this synagogue?"
Focus less on "What are your opinions and hunches?"
7. Use an embedded analysis. At each case, analyze the particular dynamics of the case, then do cross-case analysis using qualitative analysis tools such as Miles and Huberman's matrices.

I have a few comments on the "Synagogue Change" report of 12/30/98, which I thought I'd pass along.

Before distributing this document, I would take out all the references to the "original purpose" of the study, what part was "cancelled," etc. This document can stand on its own; references to what might have been are gratuitous. Instead, one can state the purpose of this report as (a) to provide information on ongoing activity and (b) to lay groundwork for possible research in the future.

The introduction views the synagogue change movement as a response to the continuity crisis. I wondered if there is any evidence of a direct connection between continuity issues and synagogue change. I found this an interesting thought because it is not clear that individual synagogues, or synagogues as a group, are threatened by the continuity crisis. Obviously some synagogues are in decline, but that's always true as a reflection of population shifts.

On p.2, we learn that the mapping is "not comprehensive," but I wondered how near or far the mapping is from comprehensiveness. Surely it includes all the major national experiments?

It was interesting to learn that 25 synagogues fall on two or more lists. Extrapolating from research on school reform, I'd speculate that involvement in multiple reform efforts leads to a lot of enthusiasm but little real change.

There are 259 synagogues participating in the 15 projects for which synagogue data are available. I wondered what proportion of all synagogues (or all Conservative and Reform synagogues) that is.

For a large number of the projects, map grid 4 indicates that the "focus varies by synagogue." I wondered if that means the project itself has no real focus. Are they more process than content? Generally, the report could say more about what the initiatives are about.

Hope these are helpful,

Adam

Malik

"syn ch" must as resp to cont. with crisis
— evidence?

— interesting bcs not clr indiv syas, or syas as a
grp, are threatened

— obv some decline, but always true due to pop shifts

p. 2 not comprehensive ???

— how close ??? surely all of the nat exprs,

— revise w/ (comp. syn subsect?) (69 syas)

— 25 syas in 2 or more lists — interesting! cf p. 5

for under public, take out all the "orig purpose,"
"pro", cancelled, etc.

— make the purpose: to inform on what's going on
: to lay groundwork for poss xtres

— 259 is what prepared at total?

— so many "focus varies by syn"

— these seem weak to me

— mainly process rather than content?

— rpt needs more on what the units are about or do

SYNAGOGUE CHANGE IN AMERICA:
A MAP OF SYNAGOGUE CHANGE INITIATIVES
AROUND THE COUNTRY

Senior Researcher: Dr. Lisa S. Malik, Ph.D

Mandel Foundation

12/30/98

This research was supported by a grant from the Nathan Cummings Foundation

SYNAGOGUE CHANGE IN AMERICA:
A MAP OF SYNAGOGUE CHANGE INITIATIVES
AROUND THE COUNTRY

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Mandel Foundation
12/30/98

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This research was supported by a grant from the Nathan Cummings Foundation

Synagogue Change in America: A Map of Synagogue Change Initiatives

Senior Researcher: Dr. Lisa S. Malik, Ph.D.

Mandel Foundation

12/30/98

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This research was supported by a grant from the Nathan Cummings Foundation

OVERVIEW: Map of Synagogue Change Initiatives

Dr. Lisa S. Malik, Ph.D.

(Mandel Foundation)

12/30/98

Background/ Introduction

Contemporary American Jewish communal leaders have often expressed the concern that the Jewish people are in very real danger of extinction, despite the fact that Jews no longer face the same persecution that their ancestors did. The leadership of the American Jewish community was particularly alarmed by the 52% intermarriage rate that became widely publicized with the publication of the 1990 National Jewish Population Survey. This astronomically high intermarriage rate reflects the reality that Jews are incredibly well accepted and have an easy time assimilating into American Jewish society. While this high rate of intermarriage reflects an extraordinary success story for American Jews, it has given Jewish communal leaders more than a little cause for concern about the future of American Judaism.

Following the publication of the 1990 NJPS, Jewish organizations around the country shifted their focus to a broad-based communal objective that they referred to as "Jewish continuity". Federations, central Jewish education agencies, private foundations, and other Jewish organizations sought to come up with solutions that would ensure that Judaism and the Jewish people would "continue" in America- that Judaism and the Jewish people would not become extinct. Acknowledging the fact that it would be unlikely (and perhaps even undesirable) to reverse intermarriage rates, Jewish communal organizations instead focused their attention on raising the probability of positive Jewish identification and affiliation (Ruskay, 1995).

"Jewish continuity commissions" were established in Federations around the country and other Jewish organizations, in addition to Federations, came up with initiatives that aimed to ensure "Jewish continuity" by designing and implementing strategies for enhancing positive Jewish identification. John Ruskay, the first director of UJA-Federation of NY's Continuity Commission, wrote and spoke about "institutional transformation" and about "creating compelling communities, inspired and inspiring communities that can sear the soul" (Ruskay, 1996).

Over the past five years, it has been truly remarkable to witness the Jewish communal responses to the "continuity crisis". One manifestation of this communal response has been the "synagogue change" movement. "Synagogue change" is a phrase that was virtually unheard of 10 years ago. Today, it is a phrase that is so commonly used that one cannot help but encounter this term in Jewish policy circles. Throughout the country, many synagogues have embarked on efforts to improve, strengthen, or transform themselves through initiatives that many refer to as "synagogue change projects" or "synagogue change initiatives". Many of these "synagogue change" efforts such as Synagogue 2000 and ECE (the Experiment for Congregational Education) have been spearheaded by umbrella organizations, and other "synagogue change" efforts have been initiated and implemented by individual synagogues. With a grant from the Nathan Cummings Foundation, the Mandel Foundation (the organization formerly known as CIJE, Council for Initiatives in Jewish Education) embarked on a national study of these synagogue change projects in 1998. This document presents a summary of the first phase of this study.

Research Questions

The primary research question that we were seeking to answer in this phase of the study was: What is happening in the arena of "synagogue change"? In other words, what does a "map" of the landscape of "synagogue change" look like? This "mapping" phase was originally intended to serve as a prelude to fieldwork in synagogues, during which we were hoping to address the following additional research questions:

- What are the various definitions and criteria of success for the various synagogue change initiatives?
- What have been the perceived outcomes of synagogue change initiatives in synagogues (in terms of process implementation and impact)?
- What factors are associated with successful synagogue change?

Originally, the purpose of the "mapping" phase was to enable us to develop a typology of synagogue change initiatives and a conceptual framework for the synagogue-level phase of the study. The recommendation to conduct this "mapping" phase before doing fieldwork in synagogues emerged from discussions of the Synagogue Change Research Project Leadership Team, the Synagogue Change Research Advisory Committee, and CIJE staff and consultants. However, because of the reorganization of the Mandel Foundation, the synagogue change research project was discontinued in the fall of 1998 and the synagogue-level fieldwork phase of the study was canceled; thus, some of the study's original research questions were not addressed.

In the "mapping" phase of our study, we aimed to identify and describe most of the major synagogue change projects that are currently being implemented across the country, focusing on planned change

initiatives whose leaders considered their projects to fit under the broad heading of a "synagogue change project" and whose main objective is institutional change. We attempted to discover as many change initiatives as possible in the time frame¹ by getting referrals from change project leaders and other leaders in regional and national Jewish agencies. Because the "map" was only intended to be a 'prelude' to the synagogue-level research, it was not meant to be comprehensive.

Research Methodology

Our primary sources of data for the "map" were written documents describing the various synagogue change initiatives and interviews with change project leaders at the 'umbrella' level (i.e. rather than synagogue professionals and lay leaders at the synagogue level, whom we had planned to interview in the next phase of this study). In preparation for the next phase of the study, we also sought to understand how leaders of synagogue change projects at the 'umbrella project' level define success for each change initiative, what they perceive to be the outcomes of these initiatives to date, and what factors they believe to be associated with successful synagogue change. While the main objective of the interviews in Phase I of this study was to gather descriptive information about existing synagogue change initiatives, we also asked interview subjects to articulate their "hunches" about factors linked to "successful synagogue change". These "hunches" were intended to inform the synagogue-level phase of our research study by enabling us to develop a "site visit guide" to focus our interviews and observations in synagogues. However, as noted above, the synagogue-level phase of the study was discontinued as part of the restructuring of the Mandel Foundation.

Summary of Research Findings

When we first began the mapping phase of the Synagogue Change Research Project, we had no idea of how many synagogue change initiatives we would discover. While we knew that the idea of "synagogue change" was popular, we did not anticipate the extent to which the synagogue change phenomenon had swept the country. In our research, we discovered over a dozen initiatives that were "synagogue change projects" even by a stringent definition of the term². When we expanded our definition to include projects that did not necessarily consider themselves to be "synagogue change projects" but which did aim to improve, strengthen, or transform synagogue life in some way (and, thus, seemed like "synagogue change projects" to some educated outside observers), we were able to identify the following 20 initiatives:

- Boston's Change Initiatives
(*Sh'arim*, *Me'ah*, and Youth Educator Initiative)
- Campaign *Shabbat*
- Carlebach Synagogue: expansion initiative
- Cooperating Schools Network (CSN)
- Designated Schools Program (DSP)
- Experiment in Congregational Education (ECE)
- Friday Night Alive
- Grants Program of the UJA-Federation Continuity Commission of NY
- Initiative in Congregational Education
- Koret Synagogue Initiative (KSI)
- LA Council on Jewish Life: Synagogue Funding Program
- *Mashkon*: Blueprint to Transform Congregational Education
- McKinsey/UJA-Federation of NY Strategic Planning Workshops for Synagogues
- National Jewish Outreach Program initiatives
- Orthodox Caucus: LEAD Rabbinic Fellowship Program
- Partners for Synagogue Change (PSC)
- Synagogue 2000
- Synagogue Initiative Program (SIP)
- Synagogue Leadership Initiative
- Whizin Institute for Jewish Family Life

¹ There was a Leadership Team meeting scheduled for the summer of 1998 and we intended to start our fieldwork in synagogues in the fall of 1998. Thus, we aimed to complete the "mapping" phase of the study by July of 1998.

² Our stringent definition of a "synagogue change project" originally incorporated the following criteria: a) leaders of the change initiative at the 'umbrella' level consider their initiative to be a "synagogue change project" and b) the primary objective of the initiative is "institutional change" (as opposed to leadership development, impact on individuals, or impact on communities).

In the appendix to this summary document, we have included one-page descriptions of these 20 synagogue change initiatives. In addition to these 20 change projects which include more than one synagogue under their 'umbrella', we also identified several individual synagogues that have embarked on their own self-initiated planned change projects without the assistance or sponsorship of an 'umbrella' organization, including Beth Am Israel (Penn Valley, PA), Chizuk Amuno (Baltimore, MD), Ramat Orah (New York, NY), and Temple Shalom (New Milford, CT). The appendix includes summaries of two of these self-initiated projects (Beth Am Israel and Chizuk Amuno).

The rest of this document provides an overview of the 20 umbrella synagogue change initiatives we have studied. Summary statistics included in this overview only pertain to the 15 initiatives for which we have quantitative data about the participating synagogues (synagogue-level data)³.

of Synagogues Involved in Synagogue Change Initiatives: The 15 umbrella change projects for which we have synagogue-level data range in scope from 2-50 synagogues each⁴. On average, each change initiative has 17 synagogues under its 'umbrella'. After accounting for duplicates and triplicates (i.e. 22 synagogues that have participated in two synagogue change initiatives and 3 synagogues that have participated in three change initiatives), there are a total of 259 synagogues that have been involved in these 15 change projects from 1991-1998. Please refer to Map Grid #1 in the appendix for a chart of the number of synagogues in each change project.

Sponsoring Agencies of Synagogue Change Projects: Synagogue change initiatives are sponsored and coordinated by various different types of organizations, including national and regional organizations. While the Synagogue 2000 initiative is coordinated by an independent transdenominational national organization (jointly staffed by academics and project associates at the University of Judaism and Hebrew Union College), other national change initiatives (such as the Cooperating Schools Network, the Experiment in Congregational Education, and the Orthodox Caucus' LEAD Rabbinic Fellowship Program) are sponsored by denominational movements, movement-affiliated colleges, or other movement-affiliated organizations. Regional sponsors of synagogue change initiatives include central education agencies, federations, federation continuity commissions, movement-affiliated regional organizations, private foundations (such as the Koret Foundation in San Francisco) and corporations (such as McKinsey Consulting Company in New York). Please refer to Map Grid #2 in the appendix for a depiction of the various sponsoring agencies of all 19 change initiatives. Most of the synagogue change projects are sponsored by regional agencies, rather than by national organizations⁵; all of these regional change initiatives are 'umbrella' projects for synagogues within a defined geographical area. Federations (or federation continuity commissions) and central education agencies are the most common types of regional organizations that sponsor synagogue change initiatives.

Geographical Representation of Synagogues Involved in Synagogue Change Projects: Communities that currently sponsor regional synagogue change initiatives include Bergen and North Hudson Counties (New Jersey), Boston, Hartford, New York, Philadelphia, San Francisco, and Washington, DC⁶. If we look at the synagogues that are part of the national change initiatives as well as the regional change initiatives, every area of the country is represented by at least a few synagogues that are involved in umbrella change projects. The strongest representation of synagogues⁷ involved in regional and national synagogue change projects and the strongest representation of regional synagogue change projects⁸ is on the East Coast. Most synagogue

³ We have synagogue-level data for the following 15 synagogue change projects: Boston's change initiatives, Cooperating Schools Network, Designated School Program, ECE, Friday Night Alive (first cadre), Grants Program of the UJA-Federation Continuity Commission of NY, Koret Synagogue Initiative, LA Council on Jewish Life's Synagogue Grant Program, Mashkon, McKinsey/UJA-Federation of NY's Strategic Planning Workshops for Synagogues, Orthodox Caucus LEAD Rabbinic Fellowship Program, Partners for Synagogue Change, Synagogue 2000 (first cadre), Synagogue Initiative Program, and the Synagogue Leadership Initiative.

⁴ Although we do know that Campaign Shabbat has over 50 synagogues under its umbrella (69, as of December, 1998), we did not include this initiative in our analysis because we could not get a complete list of participating synagogues and synagogue-level data before the publication deadline for this report. Thus, if we had added these synagogues to our total, we would not have been able to de-dupe with accuracy. Furthermore, because we could not get the list of participating synagogues for Campaign Shabbat before the publication deadline, we could not analyze the geographical and size breakdowns for this initiative.

⁵ 60% of the 20 synagogue change initiatives are regional and 40% involve synagogues from more than one geographical region.

⁶ In addition to *Mashkon* and the Initiative in Congregational Education, Greater Washington also embarked on a collaborative regional synagogue change initiative with Synagogue 2000 in 1998/1999.

⁷ Of the 259 synagogues involved in the 15 synagogue change projects for which we have synagogue-level data, 67% are located on the East Coast, 25% are on the West Coast, 5% are in the Mid-West, 2% are in the South, and 1% are located outside the U.S. (Refer to Spreadsheet #1 in the Appendix).

⁸ Of the 15 synagogue change projects for which we have synagogue-level data (Spreadsheet #2 in the Appendix), 60% are regional initiatives on the East Coast and 13% are regional initiatives on the West Coast. There are no regional synagogue change initiatives in

initiatives are regional, rather than involving synagogues from multiple geographical regions⁹. Please refer to Spreadsheet #1 in the appendix for the number of synagogues in each change project distributed by geographical location. Refer to Spreadsheets #2 and #3 in the appendix for the distribution of synagogue change initiatives by geographical location.

Movement Affiliations of Synagogues Involved in Synagogue Change Projects: Synagogue change initiatives involve synagogues from all of the denominations, with strongest representation among Conservative and Reform congregations¹⁰. All of the movements (through the movement itself or through movement-affiliated organizations) sponsor national or regional synagogue change initiatives¹¹. However, only the Reform-affiliated Experiment in Congregational Education (ECE) and Partners for Synagogue Change (PSC) are 'synagogue change initiatives' according to our stringent definition of the term (because of their focus on institutional change and their self-perceptions as synagogue change initiatives). Most synagogue change projects are trans-denominational, rather than movement-specific¹². Please refer to Map Grid #3 in the appendix for a mapping of the movement affiliations of synagogues involved in each change project.

Topics/Areas of Focus of Synagogue Change Projects: The 20 synagogue change projects cover various different topics or "areas of focus" including education, prayer services, and organizational/systemic issues. Please refer to Map Grid #4 in the appendix to see how the change initiatives map on the dimension of "topics/areas of focus". Looking at the map grid, note that "education" is the most popular area of emphasis for synagogue change initiatives. Some educational initiatives focus specifically on Jewish Family Education, including Boston's *Sh'arim*, the Cooperating Schools Network, and the Whizin Institute. With several change initiatives, the area of focus varies by synagogue; in these initiatives¹³, the 'umbrella' project leaders enable the leaders at the synagogue level to focus on an area that best meets the synagogue's objectives and that best fits the synagogue's context¹⁴.

Points of Entry of Synagogue Change Initiatives: When the synagogue is viewed as an organizational system (see "Dynamic Model of Synagogue Change" in the appendix), one can conceive of a synagogue's ongoing operations and a synagogue's implementation of change processes in terms of the interactions between various components of the organizational system: leadership, strategies, funding, and programming. As illustrated in the diagram, these four constructs interact with each other within the context of the synagogue's organizational culture and vision, and all of these constructs work together to (ideally) have an impact on the synagogue's membership. Different synagogue change initiatives seem to have different "points of entry" into the synagogue system, with each initiative attempting to enter the synagogue system through one or more of

the Mid-West or South. If we look at all 20 synagogue change projects (Spreadsheet #3 in the Appendix), 50% are regional initiatives on the East Coast and 10% are regional initiatives on the West Coast. There are no regional synagogue change initiatives in the Mid-West or South, unless we consider Detroit's JEFF (Jewish Education For Families) to be a synagogue change initiative and add it to our list of 20.

⁹ 60% of the 20 synagogue change initiatives are regional and 40% involve synagogues from more than one geographical region (Refer to Spreadsheet #3 in the Appendix).

¹⁰ Conservative synagogues represent 35%. Reform synagogues represent 33%. Orthodox synagogues represent 17%, Reconstructionist synagogues represent 11%, and unaffiliated synagogues represent 4% of the synagogues involved in the 15 change projects for which we have synagogue-level data. Refer to Spreadsheet #1 in the Appendix.

¹¹ Refer to Spreadsheets #2 and #3 in the Appendix.

¹² Of the 15 synagogue change projects for which we have synagogue-level data (Spreadsheet #2 in the Appendix), 73% are trans-denominational initiatives and 27% are movement-specific (13% of the initiatives are Reform, 7% are Orthodox, and 7% are Reconstructionist). If we look at all 20 synagogue change projects (Spreadsheet #3 in the Appendix), 65% are trans-denominational initiatives and 35% are movement-specific (16% of the initiatives are Orthodox, 5% are Conservative, 10% are Reform, and 5% are Reconstructionist).

Among the 20 change projects, there are 3 national change initiatives for Orthodox synagogues (the Carlebach Synagogue's expansion initiative, the National Jewish Outreach Program's initiative to place outreach directors in Orthodox synagogues, and the Orthodox Caucus' LEAD Rabbinic Fellowship Program), one national change initiative for Conservative synagogues (the Rabbinical Assembly and United Synagogue's Campaign Shabbat), one national change initiative for Reform synagogues (HUC-LA's Experiment in Congregational Education), one regional change initiative for Reform synagogues in the New York region (UAHC/GNYCRS's Partners for Synagogue Change), and one national change initiative for Reconstructionist synagogues (JRF's Cooperating Schools Network).

¹³ including the Grants Program of the UJA-Federation of NY's Continuity Commission, the Koret Synagogue Initiative, the LA Council on Jewish Life's Synagogue Grant Program, McKinsey/UJA-Federation of NY's Strategic Planning Workshops for Synagogues, the Orthodox Caucus' LEAD Rabbinic Fellowship Program, and Synagogue 2000.

¹⁴ In addition, for some synagogue change initiatives that have one area of focus, there are different areas of concentration within the area of focus. For example, while CSN, the Initiative in Congregational Education, and Mashkon all focus on "education", the participating synagogues each focus on different areas within education. Mashkon, for example, offers the following options for each participating synagogue: 1) To Create A Context of Meaning, 2) *Sh'lo'm Kitah*, 3) Jewish Teen Institute, 4) Jewish Family Education, and 5) Teachers Center Web Site.

these four organizational constructs or "points of entry": leadership¹⁵, strategies¹⁶, funding¹⁷, and programming¹⁸. We can use these four "points of entry" as another way of mapping the 20 synagogue change initiatives. While many synagogue change initiatives have multiple "points of entry" (Map Grid #5A in the appendix), most of these initiatives have one "point of entry" that is more dominant or primary, as indicated in Map Grid #5B.

Change initiatives that focus on "leadership" as their primary point of entry are ECE, the Orthodox Caucus' LEAD Rabbinic Fellowship Program, Partners for Synagogue Change, Synagogue 2000, and the Synagogue Leadership Initiative. Change initiatives that focus on "strategies" as their primary point of entry are the Designated School Program, McKinsey/UJA-Federation of NY's Strategic Planning Workshops for Synagogues, and the Synagogue Initiative Program. Change initiatives that focus on "funding" as their primary point of entry are Boston's *Sh'arim* (Jewish Family Educator) initiative, the Grants Program of the UJA-Federation of NY's Continuity Commission, the Initiative in Congregational Education, the Koret Synagogue Initiative, the LA Council on Jewish Life's Synagogue Grant Program, *Mashkon*, and the National Jewish Outreach Program's Outreach Directors in Orthodox Synagogues. Change initiatives that focus on "programming" as their primary point of entry are Boston's change initiatives, Campaign *Shabbat*, the Carlebach Synagogue's expansion initiative, the Cooperating Schools Network, Friday Night Alive, the National Jewish Outreach Program's *Shabbat Across America*, and the Whizin Institute.

Synagogues Involved in More Than One Synagogue Change Initiative: It is interesting to note that there were 25 synagogues involved in more than one synagogue change initiative in 1991-1998¹⁹. Being involved in more than one change project may reflect a certain change readiness and/or an organizational culture that values innovation and experimentation. While some leaders of the umbrella change initiatives indicated that synagogues involved in multiple change projects were "exemplary" in some way, other change project leaders indicated that some synagogue leaders are just "change junkies" and their synagogues are not necessarily more "successful" or "better" than synagogues that are involved in just one change initiative.

¹⁵ Change initiatives that enter the synagogue system through "leadership" attempt to train a cadre of leaders to change the synagogue's organizational culture.

¹⁶ Change initiatives that enter the synagogue system through "strategies" emphasize strategic planning and planning processes.

¹⁷ Change initiatives that enter the synagogue system through "funding" provide financial resources for planning, programming, staff, etc.

¹⁸ Change initiatives that enter the synagogue system through "programming" train people to do specific types of programs (such as Jewish Family Education programs) or provide specific types of programs (such as interactive prayer services).

¹⁹ From 1991-1998 (not including synagogues in some new initiatives beginning in 1998/1999, such as the Initiative in Congregational Education and Synagogue 2000's regional initiative in Greater Washington), the following 25 synagogues were involved in more than one initiative:

- Adat Shalom-Rockville, MD (CSN + Mashkon)
- Adath Jeshurun-Elkins Park, PA (Designated Schools Program + Friday Night Alive)
- Beth Hillel-Wynnewood, PA (Designated Schools Program + Friday Night Alive)
- Beth Zion-Beth Israel-Philadelphia, PA (Designated Schools Program + Friday Night Alive)
- Congregation Beth Am-Los Altos Hills, CA (ECE + Koret Synagogue Initiative)
- Congregation Beth David-Saratoga, CA (Koret Synagogue Initiative + Synagogue 2000)
- Congregation Beth Simchat Torah (Grants Program of NY + McKinsey)
- Congregation B'nai Jeshurun-New York, NY (McKinsey + Grants Program of NY)
- Congregation Mishkan Torah-Greenbelt, MD (CSN + Mashkon)
- Congregation Ner Tamid-Rancho Palos Verdes, CA (LA Council Synagogue Funding Program + Synagogue 2000)
- Congregation Oseh Shalom-Laurel, MD (CSN + Mashkon)
- Huntington Jewish Center-Huntington, NY (Grants Program of NY + Synagogue 2000)
- Kehillat Israel-Pacific Palisades, CA (CSN + LA Council Synagogue Funding Program)
- Leo Baeck Temple-Los Angeles, CA (ECE + LA Council Synagogue Funding Program)
- Lincoln Square-New York, NY (Grants Program of NY + McKinsey + Orthodox Caucus)
- Mishkan Shalom-Chestnut Hill, PA (CSN & Designated School Program)
- Reconstructionist Synagogue of the North Shore (CSN + Grants Program of NY)
- Temple Beth Israel-Port Washington, NY (Grants Program of NY + McKinsey)
- Temple Beth Shalom-Roslyn, NY (Grants Program of NY + McKinsey)
- Temple Isaiah-Los Angeles, CA (LA Council Synagogue Funding Program + Synagogue 2000)
- Temple Micah-Washington, DC (Mashkon + Synagogue 2000)
- Temple Shalom-Newton, MA (Boston's 3 change initiatives + ECE)
- Town & Village-New York, NY (McKinsey, Grants Program of NY + Synagogue 2000)
- West End Synagogue-New York, NY (CSN + Grants Program of NY + McKinsey)
- Westchester Reform Temple-Scarsdale, NY (ECE + Grants Program of NY)

Note that 22 synagogues were involved in two initiatives and 3 synagogues were involved in three initiatives (Lincoln Square, Town & Village, and West End Synagogue).

Differences Between Synagogue Change Initiatives

As the map grids and spreadsheets in the appendix illustrate, different synagogue change projects focus on different content areas (e.g. education, prayer, organizational dynamics and systemic issues, synagogue ambiance, etc.) and they have different points of entry into the organizational system and the change process (e.g. leadership, strategies, programming, and funding). In other words, different synagogue change initiatives utilize different levers for change and espouse different philosophies about the change process. While most²⁰ of the initiatives deal with the synagogue as a whole, some of the initiatives focus on the synagogue school as the organizational entity that is the focus of the change process (e.g. Cooperating Schools Network, Designated School Program, the Initiative in Congregational Education, *Mashkon*, and the Synagogue Initiative Program).

While many change initiatives utilize consultants, different initiatives use different consulting models. Some projects, such as the Experiment for Congregational Education (ECE) and Partners for Synagogue Change (PSC), utilize a "dedicated consultant" model, assigning one outside consultant or advisor²¹ to each participating synagogue. During its first year, Synagogue 2000 also utilized a "dedicated consultant" model, assigning one "liaison" to each synagogue; these "liaisons" consulted to the synagogues on a very part-time (and sometimes sporadic) basis while maintaining other full-time professional positions. However, Synagogue 2000 changed its consulting model in its second year by hiring two "change-agent advisors" who work at the umbrella change project level as full-time professional staff for Synagogue 2000. Most of the change initiatives that do provide consulting support to synagogues only have one consultant for all of the participating synagogues; this one consultant is usually the coordinator and 'umbrella change project leader' as well (e.g. Cooperating Schools Network, Designated School Program, Orthodox Caucus' LEAD Rabbinic Fellowship Program, Synagogue Initiative Program). While some change initiatives facilitate ongoing change-process meetings with each synagogue, other change initiatives provide consulting advice to synagogues on an as-needed per-request basis.

Although many synagogue change projects' leaders use similar terminology and "organizational change process jargon", the terms they use do not always refer to the same things. For example, different change project leaders use the terms "team" and "vision" very differently. While some people use the term "team" to refer to collaborative efforts between different agencies and movement-affiliated organizations in the community (e.g. Boston's change initiatives), other people use the term "team" to refer to collaborative efforts between lay leaders and professionals within each synagogue (e.g. ECE and PSC). While some people use the term "vision" to refer to the synagogue's mission statement (e.g. McKinsey), others use the term "vision" to refer to the umbrella project's guiding philosophy (e.g. Synagogue 2000), and others use the term "vision" to refer to one single lens or "value of spiritual peoplehood" that guides the educational curriculum (e.g. Cooperating Schools Network).

When the synagogue change project leaders²² were asked to share their hunches regarding factors linked to success, they expressed very different opinions about the role of the rabbi in the change process; while some interview subjects claimed that the rabbi's active involvement in the change process is unnecessary, others claimed that the rabbi's active support and advocacy of the change initiative is crucial to its success. The interview subjects also expressed very different conceptions about the 'ideal' leadership type that is most conducive to successful synagogue change processes: while some initiatives' coordinators felt that synagogues with dynamic and "charismatic" leaders (rabbis and other professional and lay leaders in the synagogue) were more likely to be successful, other change projects' coordinators felt that synagogues with "democratic" leaders who embodied a philosophy of "shared leadership" were more likely to be successful in their change initiatives.

Commonalities Across Synagogue Change Initiatives

Despite these differences, the various synagogue change projects do have much in common. Most initiatives provide some overall 'umbrella vision' and process guidelines while also providing opportunities for each participating synagogue to individualize and adapt the vision and process to their context. In addition, most change initiatives aim to have an impact on individuals and the local community, as well as on the synagogue as an institution.

Many initiatives involve collaborations between multiple organizations, aside from the synagogue and the sponsoring agency of the change project. For example, the Boston Commission on Jewish Continuity's change initiatives involve collaborations between the Federation, Boston Hebrew College, the Bureau of

²⁰ 12 of the synagogue change initiatives deal with the synagogue as a whole, 4 of the initiatives focus on the synagogue school, and 4 of the initiatives deal with both the synagogue and the school. Refer to Map Grid #5A in the appendix.

²¹ Each ECE advisor spends 20 days per year assisting his/her synagogue's ECE leadership team and task force.

²² from the 14 umbrella synagogue change projects and the 2 individual synagogues involved in self-initiated planned change projects for which we conducted in-depth interviews and for which we have more detailed write-ups

Jewish Education, the Synagogue Council of Massachusetts, the regional youth movements, and other Jewish communal organizations.

While the details of the change process vary from one project to the next, there were some steps that were incorporated into most of the initiatives' envisioned change processes, such as needs assessment, visioning, and program implementation. In addition, many change initiatives' process guidelines utilize similar terminology and 'buzz words', such as "community conversations", "visioning", "teamwork", and "low-hanging fruit".

Another similarity between change projects is that for many umbrella change project leaders, certain "means" of the change process are also considered "ends" in and of themselves. For example, many initiatives encourage or even require lay/professional teamwork as part of the change process; while lay/professional teamwork or collaboration is often assumed to be linked to the successful implementation of synagogue change initiatives, it is also considered to be a positive end in and of itself. Similarly, many of projects' leaders consider the change process itself to be an indicator of "success"; in other words, being involved in a change process itself is often considered to be an "ends" as well as a "means to an end".

One commonality across synagogue change initiatives that was particularly impressive was the extent to which the umbrella project leaders referred to each others' initiatives. Many of the newer change projects' leaders consulted with leaders of projects that have been in existence for awhile to get advice and suggestions about the change process. Even seasoned change project leaders seemed to get input from others about synagogue change. Cross-fertilization of ideas between initiatives seems to be de rigeur among professionals involved in synagogue change.

Summary of "Hunches"

The leaders of the synagogue change initiatives who were interviewed in Phase I of this study eagerly shared their "hunches" about factors linked to successful synagogue change. There was more general agreement on the characteristics of the synagogues than on the characteristics of the change process that are most conducive to successful synagogue change. The most frequently cited characteristics of synagogues that were presumed to be linked to success were the following:

- leadership traits and characteristics (including professional staff with outstanding capabilities, a rabbi who is reflective and willing to take risks, and committed lay leaders with expertise in areas that are useful to the change process)
- widespread professional and lay leadership support for the change initiative²³
- an organizational culture and mindset that supports change
- resources (financial and personnel)
- positive lay/professional relations

The most frequently cited characteristics of the change process that were presumed to be linked to success were the following:

- teamwork: opportunities for lay leaders and professional to work together as a team
- consultation: an ongoing consulting structure with highly skilled outside consultants
- vision: a clear purpose and guiding principles for the initiative
- Jewish content: infused with Jewish ideas and subject matter
- adaptability: allowing for adaptation of the initiative to each synagogue's particular context

While the synagogue change initiative leaders did agree on many of their "hunches" and assumptions about factors linked to successful synagogue change, there were some areas of disagreement as well. In particular, the 'umbrella' project leaders disagreed on the following issues:

- What is the 'ideal rabbinical leadership-type' that is most conducive to successful synagogue change initiatives? Is it better to have a rabbi who exhibits a dynamic and charismatic leadership style or one who exhibits a democratic, "shared leadership" style?
- To what extent does the synagogue's vision need to be clearly articulated in order for synagogue change initiatives to be most successful?

²³ In my own research about the institutionalization of Jewish Family Education in synagogues, I found that it was more important to have the support of lay people and professionals with high informal status in the synagogue's informal organizational networks than the support of people in positions of formal authority (such as board members or committee chairpeople) (Malik, 1997).

- What are the organizational characteristics that are most conducive to successful synagogue change? Is it necessary for synagogues to be 'business-like' or is it preferable for synagogues not to be 'corporate'?
- What is the ideal scope of the change process? Is it preferable for the initiative to focus on the institution as a whole or to focus on one aspect of the synagogue (or school) at a time?
- Is it necessary for 'change managers' to be 'on-site' at synagogues for the initiative to be successful?
- What is the ideal consulting model that should be used by the change agent?: Is a "dedicated consultant" model preferable to other models?
- How important is it for the change process to incorporate "inspirational" experiences for its participants (in the form of retreats, participatory prayer services, text-study, etc.)?

With all of these 'areas of disagreement', the overall concerns are: What is most conducive to successful synagogue change? Even if a factor is conducive to success, is it necessary? We had planned to focus on some of these 'areas of disagreement' in the synagogue-level phase of this study. Perhaps other researchers will pick up where we left off and address some of these very critical issues.

Suggestions for Future Research

Since the original intention of this study was to conduct fieldwork following the "mapping" phase, we clearly advocate a synagogue-level follow-up to this study. The following is a suggested research design for such a follow-up study, based on several teleconferences, a meeting of the Synagogue Change Research Leadership Team, and input from the Research Advisory Committee.

Defining synagogues as the unit of analysis, we propose a multiple case-study design (Yin, 1989), incorporating qualitative methods such as interviews and focus groups. Such a study should aim to describe the various definitions of success used within synagogues, the ways in which actual implementation of the change process in synagogues matches up to the envisioned process, and the ways in which the change project has had an impact on individual synagogues and congregants. Ultimately, researchers should attempt to identify those characteristics of synagogues and of change processes that are linked to successful synagogue change, based on the change projects' and synagogues' own definitions of "success". We suggest focusing on a few factors that are potentially linked to success, such as those 'areas of disagreement' that were identified by interviewing the umbrella-project leaders in the "mapping" phase of the study (see previous section on "hunches"). While the "mapping" phase of the study provided breadth to our understanding of synagogue change initiatives, a synagogue-level phase should attempt to contribute depth to our understanding. By focusing on fewer synagogues in more depth, we would be able to provide a rich accounting of the specifics of the change process.

After much discussion, we decided that site-selection should not be guided by the strategies of "ideal-bellwether-case selection" or "extreme-case selection" (Goetz & LeCompte, 1984; Merriam, 1998). Some of the reasons for rejecting the idea of selecting all "successful" synagogues include the fact that you need "unsuccessful" as well as "successful" synagogues in order to understand which factors are linked to success and that there may not be any cases of "success" yet (since some synagogues may be at too early a stage in the change process). One of the reasons for rejecting the idea of even using "success" as a primary site-selection criterion is the potential bias involved in asking umbrella change project leaders to identify "successful" and "unsuccessful" synagogues (due to the blurring of lines between definitions of success and factors linked to success). Another reason for rejecting the idea is the political issue involved in asking umbrella change project leaders to identify "unsuccessful" synagogues. In addition, there is a conceptual difficulty in using "success" as a site-selection criterion since "success" is a contested term: there are multiple notions and definitions of success even within one synagogue.

Rather than using "success" as a site-selection criterion, we recommend using one of the typologies of synagogue change initiatives from the "mapping" phase as the primary basis for site-selection. In selecting synagogues for case studies, researchers should start at the level of the synagogue change project. In particular, we recommend using the "points-of-entry of synagogue change projects" typology outlined in Map Grids #5A and #5B (in the appendix):

- 1) Leadership: training a cadre of leaders to change the synagogue's organizational culture
- 2) Strategies: emphasis on strategic planning and planning process
- 3) Funding: providing financial resources for planning, programming, staff, etc.
- 4) Programming: training people to do specific types of programs (such as Jewish Family Education programs) or providing specific types of programs (such as interactive prayer services)

Within each of these categories, researchers should select at least one synagogue change initiative. For example, one could select Synagogue 2000 and/or ECE as initiatives whose primary focus is "leadership", the McKinsey Project as an initiative whose primary focus in "strategies", the Koret Synagogue Initiative as an

initiative whose primary focus is "funding", and the Cooperating Schools Network as an initiative whose primary focus is "programming". Within each of these change initiatives, we recommend selecting at least 2 synagogues. In the overall 'batch' of 8-10 synagogues selected, we should attempt to select synagogues of different sizes, movement affiliations, and geographical regions to ensure diversity on some key characteristics. These selections could be made from the pool of "*vatikim*" synagogues that have been participating in each of the selected synagogue change initiatives for at least a few years, using an algorithm like the "greedy search algorithm" (Wyner, 1998). Before finalizing the list of selected sites, researchers should get a sense from the umbrella change project leaders about their perceptions of the levels of "success" of the synagogues that were selected using the greedy search algorithm (on the variables "size", "movement" and "geographical region"); this is just to ensure that the researchers have not mistakenly selected all "successful" or all "unsuccessful" synagogues (at least according to the definitions of the umbrella change project leaders). It is hoped that the cases selected will be of varying levels of "success". Because this is a multiple case-study design, the logic is one of "replication logic" rather than "statistical sampling logic". The cases should produce contrary results for theoretical reasons, in line with the logic of "theoretical replication" (Yin, 1989).

In the field, the primary sources of data should be observations and interviews at each of the selected synagogues. Key informants include the rabbi, educator/principal, cantor, executive director and other synagogue staff, board members and other lay leaders, any outside liaisons or consultants involved in the change process, lay leaders involved in the change process, and other congregants. For the interviews, rather than using a "survey in interview format", researchers should use a "site-visit guide". This guide should feature a checklist that focuses on a few key factors (such as those derived from the "mapping" phase of the study), but the interviewers should go into the field with an open mind. Observations should include informal "cruises" (Dwyer, Lee, Barnett, Filby, & Rowan, 1985) of the synagogue and synagogue school, as well as observations of board meetings and meetings that are specifically related to the change process. We recommend analyzing the data using an iterative process of data reduction, data display, and conclusion-drawing and verification. It should be an embedded analysis, in which each case is analyzed for its particular dynamics and then followed up by a cross-case analysis using qualitative analysis tools such as matrices (Miles & Huberman, 1994).

For More Information

More detailed descriptions of most of the synagogue change initiatives²⁴ listed in this report are available in a longer publication that is available at the Mandel Foundation ("Synagogue Change In America: A Map of Synagogue Change Projects Around the Country (Long Version)"). You can order this publication by calling the Mandel Foundation at (212) 532-2360. Included in the "Long Version" are the names and phone numbers of key contact people for each synagogue change initiative.

²⁴ There are more detailed 'map summary write-ups' of the following 14 umbrella synagogue change projects: Boston's Change Initiatives (*Sh'arim*, *Me'ah*, and Youth Educator Initiative), the Cooperating Schools Network (CSN), the Designated Schools Program (DSP), the Experiment in Congregational Education (ECE), Friday Night Alive, the Grants Program of the UJA-Federation Continuity Commission of NY, the Koret Synagogue Initiative (KSI), McKinsey/UJA-Federation of NY Strategic Planning Workshops for Synagogues, Orthodox Caucus: LEAD Rabbinic Fellowship Program, Partners for Synagogue Change (PSC), Synagogue 2000, Synagogue Initiative Program (SIP), Synagogue Leadership Initiative, and the Whizin Institute. There are also detailed 'map summary write-ups' for each of the following individual synagogues that embarked on their own planned change initiatives: Beth Am Israel and Chizuk Amuno.

APPENDIX

MAP GRID #1

NUMBER OF SYNAGOGUES IN EACH CHANGE PROJECT

Version 1/7/99

NAME OF CHANGE PROJECT	NUMBER OF SYNAGOGUES
Boston Change Initiatives: Sh'arim, Me'ah, and YEI	28 (=13 Sh'arim + 22 Me'ah + 12 YEI – duplicates)
Campaign Shabbat	incomplete data
Carlebach Synagogue: expansion initiative	incomplete data
Cooperating Schools Network (CSN)	21
Designated Schools Program (DSP)	7
Experiment in Congregational Education (ECE)	14
Friday Night Alive	6 in first cadre (+ 12 planned for 98/99)
Grants Program – NY UJA Fed	22 (+ 3 denominational synagogue project grants + 1 collaborative inter-synagogue grant)
Initiative in Congregational Education (Greater Washington)	initiative just beginning in 1998/1999
Koret Synagogue Initiative (KSI)	8
LA Council on Jewish Life Synagogue Grant Program	50 synagogue grant recipients 1991-1997 (not including grants for collaborative initiatives)
Mashkon: Blueprint to Transform Congregational Education (Greater Washington)	25
McKinsey/UJA Fed. (NY)	25
National Jewish Outreach Program: Outreach Directors in Orthodox Synagogues	incomplete data
Orthodox Caucus LEAD Rabbinic Fellowship Program	15
Partners for Synagogue Change (PSC)	4
Synagogue 2000	16 in first cadre (+ 6 planned in Washington, DC for 98/99)
Synagogue Initiative Program (SIP)	2
Synagogue Leadership Initiative (SLI)	44 at kick-off event
Whizin Institute for Jewish Family Life	incomplete data
Total # (for 15 projects for which we have synagogue data)	259 (= 287-duplicates & triplicates)

MAP GRID #2

SPONSORING AGENCIES OF SYNAGOGUE CHANGE PROJECTS

Version 1/7/99

NATIONAL ORGANIZATION				REGIONAL ORGANIZATION			INDIVIDUAL SYNAGOGUE
Independent	Movement, Movement-Affiliated College or other Org.	Central Education Agency	Federation or Continuity Commission	Foundation	Movement, Movement-Affiliated Organization	Other	
<input type="checkbox"/> Synagogue 2000 <input type="checkbox"/> Whizin	<input type="checkbox"/> Campaign Shabbat (Conserv.) <input type="checkbox"/> Carlebach Synagogue expansion initiative <input type="checkbox"/> CSN (Recon.) <input type="checkbox"/> ECE (Reform) <input type="checkbox"/> National Jewish Outreach Program <input type="checkbox"/> Orthodox Caucus LEAD Rabbinic Fellowship Program	<input type="checkbox"/> DSP (Philadelphia) <input type="checkbox"/> Mashkon (Washington) <input type="checkbox"/> Synagogue Initiative Program (SIP) (Hartford, CT)	<input type="checkbox"/> Friday Night Alive (Philadelphia) <input type="checkbox"/> Grants Program-UJA-Federation (NY) <input type="checkbox"/> Initiative in Congregational Education (Washington) <input type="checkbox"/> LA Council on Jewish Life Synagogue Grant Program <input type="checkbox"/> McKinsey/UJA (NY) <input type="checkbox"/> Me'ah, Sh'arim and YFI (Boston) <input type="checkbox"/> Synagogue Leadership Initiative (SLI) (NJ)	<input type="checkbox"/> Koret (KSI) (SF Bay Area)	<input type="checkbox"/> Partners for Synagogue Change - (PSC) [NY]	<input type="checkbox"/> McKinsey/UJA (NY)	<input type="checkbox"/> (Beth Am Israel) <input type="checkbox"/> (Chizuk Amuno) <input type="checkbox"/> Others.....

MAP GRID #3

MOVEMENT AFFILIATION OF SYNAGOGUES INVOLVED IN EACH CHANGE PROJECT

Version 1/7/99

	ORTHODOX	CONSERVATIVE	REFORM	RECONSTRUCTIONIST	TRANSDENOMINATIONAL
Boston Change Initiatives		X	X		X
Campaign Shabbat		X			
Carlebach Synagogue: expansion initiative	X				
Cooperating Schools Network (CSN)				X	
Designated Schools Program (DSP)		X	X	X	X
Experiment in Congregational Education (ECE)			X		
Friday Night Alive		X	X	X	X
Grants Program – NY UJA Fed.	X	X	X	X	X
Initiative in Congregational Education (Greater Washington)		X	X	X	X
LA Council on Jewish Life Synagogue Grant Program	X	X	X	X	X
Mashkon: Blueprint to Transform Congregational Education (Greater Washington)		X	X	X	X
McKinsey/UJA Fed. (NY)	X	X	X	X	X
National Jewish Outreach Program: Outreach Directors in Orthodox Synagogues	X				
Orthodox Caucus LEAD Rabbinic Fellowship Program	X				
Partners for Synagogue Change (PSC)			X		
Synagogue 2000		X	X		X
Synagogue Initiative Program (SIP)		X	X		X
Synagogue Leadership Initiative (SLI)	X	X	X	X	X
Whizin		X	X	X	X

MAP GRID #4

“TOPICS/AREAS OF FOCUS” OF SYNAGOGUE CHANGE PROJECTS

Version 1/11/99

	Education	Prayer Services	Healing	Ambiance	Social Action	Organizational Dynamics & Systemic Issues	Other	Focus varies by synagogue
Boston Change Initiatives	X							
Campaign Shabbat	X						X	
Carlebach Synagogue expansion initiative		X						
Cooperating Schools Network (CSN)	X							X
Designated Schools Program (DSP)	X					X		
Experiment in Congregational Education (ECE)	X							
Friday Night Alive		X						
Grants Program – NY UJA Fed								X
Initiative in Congregational Education (Greater Washington)	X							X
Koret Synagogue Initiative (KSI)								X
LA Council on Jewish Life Synagogue Grant Program								X
Mashkon: Blueprint to Transform Congregational Education (Greater Washington)	X							X
McKinsey/UJA Fed. (NY)								X
National Jewish Outreach Program: Outreach Directors in Orthodox Synagogues							X	
Orthodox Caucus LEAD Rabbinic Fellowship Program								X
Partners for Synagogue Change (PSC)						X		
Synagogue 2000	Not Yet	X	X	X	Not Yet			X
Synagogue Initiative Program (SIP)	X					X		
Synagogue Leadership Initiative (SLI)						X		
Whizin	X							

MAP GRID #5A

“POINTS OF ENTRY” FOR SYNAGOGUE CHANGE PROJECTS

Version 1/7/99

Leadership: training a cadre of leaders to change the org. culture

Strategies: Planning Process

Funding: providing financial resources for planning, programming, staff, etc.

Programming: training people to do specific types of programs or providing specific types of programs

	<u>Synagogue</u>	<u>School</u>	<u>Synagogue</u>	<u>School</u>	<u>Synagogue</u>	<u>School</u>	<u>Synagogue</u>	<u>School</u>
Boston Change Initiatives: Sh'arim, Me'ah, YEF	X	X			X Sh'arim	X Sh'arim	X	X
Campaign Shabbat							X	
Carlebach Synagogue: expansion initiative							X	
Cooperating Schools Network (CSN)								X
Designated School Program (DSP)				X				
Experiment in Congregational Education (ECE)	X	X	X	X				
Friday Night Alive							X	
Grants Prog. – NY UJA Federation					X			
Initiative in Congregational Education (Greater Washington)						X		
Koret Synagogue Initiative (KSI)					X		X	
LA Council on Jewish Life Synagogue Grant Program					X			
Mashkon: Blueprint to Transform Congregational Education (Greater Washington)		X				X		
McKinsey/UJA Fed. (NY)			X					
National Jewish Outreach Program: Outreach Directors in Orthodox Synagogues and Shabbat Across America					X		X	
Orthodox Caucus LEAD Rabbinic Fellowship Program	X							
Partners for Synagogue Change (PSC)	X							
Synagogue 2000	X						X	
Syn. Initiative Program (SIP)			X	X				
Syn. Leadership Initiative (SLI)	X							
WhizIn	X	X					X	X

MAP GRID #5B

PRIMARY "POINTS OF ENTRY" FOR SYNAGOGUE CHANGE PROJECTS

Version 1/7/99

	<u>Leadership:</u> training a cadre of leaders to change the org. culture	<u>Strategies:</u> Planning Process	<u>Funding:</u> providing financial resources for planning, programming, staff, etc.	<u>Programming:</u> training people to do specific types of programs or providing specific types of programs
PRIMARY "POINT OF ENTRY"	<input type="checkbox"/> ECE <input type="checkbox"/> Orthodox Caucus <input type="checkbox"/> LEAD <input type="checkbox"/> PSC <input type="checkbox"/> Synagogue 2000 <input type="checkbox"/> Synagogue Leadership Initiative (SLI)	<input type="checkbox"/> Designated School Program (DSP) <input type="checkbox"/> McKinsey/UJA <input type="checkbox"/> SIP	<input type="checkbox"/> Boston: Sh'arim <input type="checkbox"/> Grants Program of NY UJA-Federation <input type="checkbox"/> Initiative in Congregational Education (Washington) <input type="checkbox"/> Koret Synagogue Initiative (KSI) <input type="checkbox"/> LA Council on Jewish Life Synagogue Grant Program <input type="checkbox"/> Mashkon (Washington) <input type="checkbox"/> National Jewish Outreach Program: Outreach Directors in Orthodox Synagogues	<input type="checkbox"/> Boston Change Initiatives: Sh'arim, Me'ah, & YEI <input type="checkbox"/> Campaign Shabbat <input type="checkbox"/> Carlebach Synagogue: expansion initiative <input type="checkbox"/> Cooperating Schools Network (CSN) <input type="checkbox"/> Friday Night Alive <input type="checkbox"/> National Jewish Outreach Program: Shabbat Across America <input type="checkbox"/> Whizin
SECONDARY "POINT OF ENTRY"	<input type="checkbox"/> Boston Change Initiatives: Sh'arim, Me'ah, & YEI <input type="checkbox"/> Mashkon (Washington) <input type="checkbox"/> Whizin	<input type="checkbox"/> ECE		<input type="checkbox"/> Koret Synagogue Initiative (KSI) <input type="checkbox"/> Synagogue 2000

Chart 1: Number of Synagogues in Each Change Project, Distributed by Geographical Location, Movement, & Size (for 15 change initiatives for which we have synagogue-level data)

SYNAGOGUE CHANGE PROJECT	GEOGRAPHICAL LOCATION					TOTALS	MOVEMENT					TOTAL	SIZE					TOTALS
	East	West	Mid-West	South	International		Orthodox	Conservative	Reform	Reconstructionist	Unaffiliated		No Data	Small Under 500	Medium 500-800	Large 800+	No Data	
Boston's change initiatives	28	0	0	0	0	28	0	11	12	0	2	3	28	4	5	4	15	28
Cooperating Synagogues Network	9	4	5	2	1	21	0	0	0	0	21	0	21	19	2	0	0	21
Designated Synods Program	7	0	0	0	0	7	0	4	2	0	0	0	7	4	2	1	0	7
ECE	4	4	4	2	0	14	0	0	14	0	0	0	14	2	5	7	0	14
Friday Night Alive-first cadre	6	0	0	0	0	6	0	5	0	0	0	0	6	4	1	1	0	6
Grants Program-Mt. Fed.	22	0	0	0	0	22	5	8	3	3	3	0	22	0	0	0	22	22
Korat Synagogue Initiative	0	8	0	0	0	8	0	3	5	0	0	0	8	0	0	6	2	8
LA Council Jewish Life-Syn. Grants	0	50	0	0	0	50	11	15	18	3	3	0	50	0	0	0	50	50
Mashkon	25	0	0	0	0	25	0	12	8	3	2	0	25	0	0	0	25	25
McKinsey/AJJA	25	0	0	0	0	25	5	11	4	5	2	0	25	12	7	5	1	25
Orthodox Caucus	10	1	2	0	2	15	15	0	0	0	0	0	15	0	0	0	15	15
Partners for Synagogue Change	4	0	0	0	0	4	0	0	4	0	0	0	4	0	2	2	0	4
Synagogue 2000-first cadre	9	4	3	0	0	16	0	8	8	0	0	0	16	6	7	3	0	16
Synagogue Initiative Program	2	0	0	0	0	2	0	1	1	0	0	0	2	1	1	0	0	2
Synagogue Leadership Initiative	44	0	0	0	0	44	9	21	9	1	1	3	44	26	8	0	10	44
Total # synagogues (before de-duping)	195	71	14	4	3	287	45	99	88	36	13	6	287	78	46	25	138	287
subtract duplicates & triplicates:	22	6	0	0	0	28	2	10	6	8	2	0	28	4	2	3	19	28
Total # synagogues (after de-duping)	173	65	14	4	3	259	43	89	82	28	11	6	259	74	44	22	119	259
Total % (after de-duping):	66.80%	25.10%	5.41%	1.54%	1.16%		17.00%	35.18%	32.41%	11.07%	4.35%			52.86%	31.43%	15.71%		

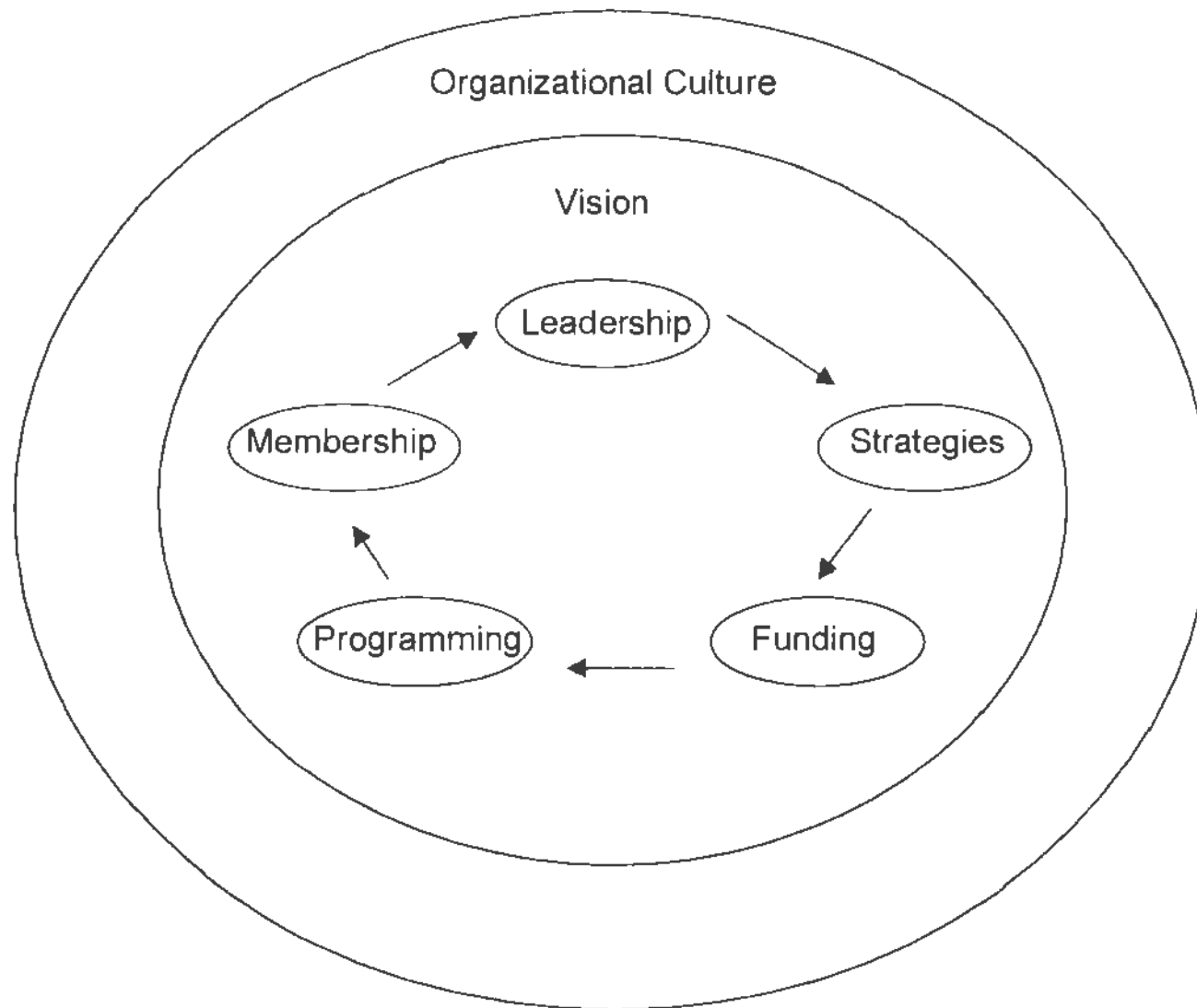


Chart 2: % of Synagogues in Each Change Project: Distributions by Geographical Location & Movement (for 15 change initiatives for which we have synagogue-level data)														
SYNAGOGUE CHANGE PROJECT	GEOGRAPHICAL LOCATION			MOVEMENT					RECONSTRUCTION					Trans-Denominational
	East	West	Mid West	South	International	Trans-regional	Orthodox	Conservative	Reform	Reconstructionist	Unaffiliated			
Boston's change initiatives	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	48.00%	0.00%	8.00%	100.00%	0.00%	100.00%
Cooperating Schools Network	42.86%	19.05%	23.81%	9.52%	4.76%	100.00%	0.00%	0.00%	0.00%	100.00%	0.00%	100.00%	0.00%	100.00%
Designated Schools Program	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	28.57%	14.29%	0.00%	100.00%	0.00%	100.00%
ECE	28.57%	28.57%	28.57%	14.29%	0.00%	100.00%	0.00%	0.00%	100.00%	0.00%	0.00%	100.00%	0.00%	100.00%
Friday Night Alive First cadre	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	16.67%	0.00%	100.00%	0.00%	100.00%
Grants Program-NT Fed	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	22.73%	36.36%	13.64%	13.64%	0.00%	100.00%	0.00%	100.00%
Grants Program Initiative	0.00%	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	62.50%	0.00%	0.00%	100.00%	0.00%	100.00%
LA Coastal Jewish Life Syn. Grants	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	22.00%	30.00%	38.00%	6.00%	0.00%	100.00%	0.00%	100.00%
La Shalom	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	12.00%	8.00%	100.00%	0.00%	100.00%
Madame Tzipora	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	16.00%	0.00%	0.00%	100.00%	0.00%	100.00%
Oranienburg Chupa	88.89%	0.00%	0.00%	0.00%	0.00%	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Partners for Synagogue Change	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	100.00%	0.00%	0.00%	100.00%	0.00%	100.00%
Synagogue 2000-First cadre	56.25%	25.00%	18.75%	0.00%	0.00%	100.00%	0.00%	50.00%	30.00%	0.00%	0.00%	100.00%	0.00%	100.00%
Synagogue Initiative Program	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	50.00%	50.00%	0.00%	0.00%	100.00%	0.00%	100.00%
Synagogue Leadership Initiative	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	21.95%	31.82%	21.95%	2.44%	2.44%	100.00%	0.00%	100.00%
% of change projects with synagogues all in one category	60.00%	13.33%	0.00%	0.00%	0.00%	26.67%	6.67%	0.00%	13.33%	6.67%	0.00%	73.33%	0.00%	73.33%

Chart 3: Distribution of Synagogue Change Initiatives by Geographical Location and Movement (for all 20 Initiatives)												
SYNAGOGUE CHANGE PROJECT	GEOGRAPHICAL LOCATION						MOVEMENT					
	East	West	Mid-West	South	International	Trans-regional	Orthodox	Conservative	Reform	Reconstructionist	Unaffiliated	Trans-Denominational
Chart 3: Distribution of Synagogue Change Initiatives by Geographical Location and Movement (for all 20 Initiatives)												
SYNAGOGUE CHANGE PROJECT	GEOGRAPHICAL LOCATION						MOVEMENT					
	East	West	Mid-West	South	International	Trans-regional	Orthodox	Conservative	Reform	Reconstructionist	Unaffiliated	Trans-Denominational
Boston's change initiatives	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	44.00%	46.00%	0.00%	8.00%	100.00%
Campaign Shabbat	no data	no data	no data	no data	no data	100.00%	0.00%	100.00%	0.00%	0.00%	0.00%	0.00%
Carlebach Synagogue: expansion	no data	no data	no data	no data	no data	100.00%	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Cooperating Schools Network	42.86%	19.05%	23.81%	9.52%	4.76%	100.00%	0.00%	0.00%	0.00%	100.00%	0.00%	0.00%
Designated Schools Program	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	57.14%	28.57%	14.29%	0.00%	100.00%
ECE	28.57%	28.57%	28.57%	14.29%	0.00%	100.00%	0.00%	0.00%	100.00%	0.00%	0.00%	0.00%
Friday Night Alive-first cadre	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	83.33%	0.00%	16.67%	0.00%	100.00%
Grants Program-NY Fed	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	22.73%	36.36%	13.64%	13.64%	13.64%	100.00%
Initiative in Congregational Education	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	no data	no data	no data	no data	no data	100.00%
Koret Synagogue Initiative	0.00%	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	37.50%	62.50%	0.00%	0.00%	100.00%
LA Council Jewish Life Syn. Grants	0.00%	100.00%	0.00%	0.00%	0.00%	0.00%	22.00%	30.00%	36.00%	6.00%	6.00%	100.00%
Mashkon	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	48.00%	32.00%	12.00%	8.00%	100.00%
McKinsey/UJA	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	20.00%	44.00%	16.00%	12.00%	100.00%
National Jewish Outreach Program	no data	no data	no data	no data	no data	100.00%	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Orthodox Caucus	100.00%	6.67%	13.33%	0.00%	13.33%	100.00%	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Partners for Synagogue Change	56.25%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	100.00%	0.00%	0.00%	0.00%
Synagogue 2000-first cadre	100.00%	25.00%	18.75%	0.00%	0.00%	100.00%	0.00%	50.00%	50.00%	0.00%	0.00%	100.00%
Synagogue Initiative Program	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	50.00%	50.00%	0.00%	0.00%	100.00%
Synagogue Leadership Initiative	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	21.95%	51.22%	21.95%	2.44%	2.44%	100.00%
Whizin Institute	no data	no data	no data	no data	no data	100.00%	no data	no data	no data	no data	no data	100.00%
% of change projects with synagogues all in one category	50.00%	10.00%	0.00%	0.00%	0.00%	40.00%	15.00%	5.00%	10.00%	5.00%	0.00%	65.00%

DYNAMIC MODEL OF SYNAGOGUE CHANGE

based on Synagogue Change Leadership Team Meeting 8/4/98 (revised: 10/98)



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

Sponsoring Agency: individual synagogue: Beth Am Israel-Penn Valley, PA (Conservative)

Funding Sources: Grant from the Jewish Federation of Greater Philadelphia's Continuity Commission

Summary of Change Initiative:

In the summer of 1993, Rabbi Marc Margolius challenged Cyd Weissman (the educational director) to either create a better "failed model" of supplementary education or to create a new model altogether. The model that Cyd and Rabbi Margolius developed was partially inspired by the book, *A Congregation of Learners* (Aron, Lee, and Rossel) and by Jonathan Woocher's article on Jewish identity which expressed the idea that identity is formed by being within a community of practice and value. The Design Project's vision is of a "community of engagement". Originally, the vision was of a "community of learners" (a term borrowed from ECE, the Experiment in Congregational Education); the language of the change project was changed because some congregants felt belittled by the term, in light of the synagogue's history of commitment to *Torah*, *Avodah* and *Gemilut Chassadim*. The vision is that all members will be engaged by the synagogue's challenge to take seriously their Jewish involvement and communal responsibilities. The synagogue expects and enjoys a remarkably high level of congregant involvement in all aspects of synagogue life, from delivering meals to the homeless to delivering *divrei Torah*. In striving to become a "community of engagement", Beth Am Israel blends respect for tradition with openness to innovative forms of Jewish expression. It provides an alternative model for supplementary school education that actively aims to get families engaged in Jewish living and learning.

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

After articulating their vision and expectations, the synagogue professionals in partnership with the education committee implemented a host of new educational programs in 1994. The core educational program occurs on Shabbat and is, in fact, interwoven with the Shabbat morning service. Children in first grade and up have the option to participate in the *Beit Midrash* in lieu of *Bet Sefer*. *Beit Midrash* was not intended to be a traditional Hebrew School model. It is the synagogue professionals' expectation that the *Beit Midrash* is a place where adults go on journeys with their children. Furthermore, the Design Project envisions the synagogue as a community. *Beit Midrash* students come to the synagogue for classes on Thursday afternoons; they also come with their families on Shabbat morning and break away into their own classes during the Shabbat service. Additional *Beit Midrash* programming includes Shabbat lunches, continued study in the Shabbat Academy (9-10 a.m.), services (11 a.m.-12:30 p.m.), minyanim with children (11 a.m.-12 p.m.), story reading and help in the classroom (10 a.m.-11 a.m.). Students are expected to continue this study through the 12th grade. The rabbi and education director deliberately changed the language of the BAI community because of their belief that language impacts people's attitudes. Since "Hebrew School" conjures up a negative image for most people, Shabbat educational programming is called *Beit Midrash* and Sunday educational programming is called *Beit Sefer*.

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

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

Funding Sources: *Sh'arim*: COJC; *Me'ah*: grants from CJP Donor-Advised Funds and the Righteous Persons Foundation; *YEI*: COJC grants made available through Combined Jewish Philanthropies Endowment funds.

Summary of Change Initiative: Boston's Commission on Jewish Continuity, which was formed in 1989, sponsors and coordinates three educational initiatives: *Sh'arim*, *Me'ah*, and the Youth Educator Initiative (YEI). Together, all 3 initiatives aim to ensure a strong future for the Boston Jewish community by fostering positive change in Jewish institutions and individuals through the route of Jewish education. There are 28 Conservative and Reform synagogues participating in one or more of these initiatives. While *Sh'arim* and *Me'ah*'s participating sites include other Jewish organizations in addition to synagogues, YEI's sites are all synagogues.

•*Sh'arim* provides funding to 13 synagogues (and 3 other institutions) to enable them to hire part-time or full-time professional Jewish family educators. For the first three years of each institution's grant, *Sh'arim* funds 50% of the family educator's salary; in the fourth year and beyond, *Sh'arim* matches 25-40% of the institution's contributions to the family educator's salary. In addition to funding salaries, *Sh'arim* also provides two years of training at Boston Hebrew College for each family educator and facilitates ongoing networking opportunities for Boston's family educators via the BJE's Family Educator Network. Through its funding and leadership development strategies, *Sh'arim* aims to transform institutions (primarily synagogues) by enabling them to hire professionally trained family educators; it also aims to transform Jewish families and to build the profession of Jewish family education. Implementation of *Sh'arim* began in 1993.

•*Me'ah*, a cooperative venture between Boston Hebrew College and the COJC, is an intensive high-quality program of Jewish study which provides 100 hours of learning over the course of two years to each participating adult. *Me'ah* furnishes adults with a framework for ongoing study of Jewish texts, philosophy, and history, based on the belief that Jewish learning can have an impact on individuals, institutions (including synagogues) and the community. There are currently 17 *Me'ah* sites, representing 28 institutions (including 22 synagogues). *Me'ah* aims to change the culture of the Boston Jewish community by increasing the status of Jewish education and the personal meaning of Jewish learning for leaders in Jewish institutions (including synagogues) throughout the Boston area. Its objectives include increasing Jewish literacy of Jewish adults, building a community of active Jewish learners in the Boston area, and transforming Jewish institutions (including synagogues) by involving *Me'ah* participants and graduates as role models and leaders among their membership. Implementation of *Me'ah* began in 1994.

•The Youth Educator Initiative (YEI) consists of professional development for youth educators, consultation to youth educators, community team events for people who work with teenagers, and funding to synagogues for the improvement of youth programming, organizational development in the area of youth education, and professional development for youth educators. With guidance from the BJE and the Synagogue Council of Massachusetts, teams of lay and professional leaders at each of the 12 YEI synagogues work together to develop and implement a comprehensive vision of the ideal youth community for that synagogue that integrates formal studies, youth group activities, Jewish camping, and the Israel experience. YEI's objectives include enhancing the profession of youth educator and the field of Jewish youth work, upgrading the Judaic content of programs for teens and pre-teens, enhancing the Boston Jewish community's impact on its youth, transforming synagogues into places where there is integration between formal and informal educational opportunities for teens and pre-teens, and developing and strengthening the institutional structures that design, oversee and implement Jewish youth programs. YEI was initially piloted in 1994; it became a fully developed initiative in 1996.

Title of Synagogue Change Project: Campaign Shabbat

Sponsoring Agency: Committee for Commitment and Observance (Rabbinical Assembly and United Synagogue)

Funding Sources: Rabbinical Assembly and United Synagogue

Summary of Change Initiative:

Campaign Shabbat was initiated by the Committee for Commitment and Observance, a collaborative effort of the Rabbinical Assembly and the United Synagogue of Conservative Judaism. The overall objective of Campaign Shabbat is to challenge synagogue congregants to explore Shabbat and to give them the tools to learn about Shabbat and its observance. Some of the slogans that have been used for Campaign Shabbat include "Shabbat: Experience the Joy" and "Shabbat: A Rest for the Day of Your Life". It is an inreach program for synagogue members that is premised on the assumption that congregants are not "stupid"; they are just "ignorant" about some of the aspects of Shabbat observance and are embarrassed to say "Teach Me". Campaign Shabbat requires participating synagogues to offer educational activities such as tutoring and training and to provide support groups for congregants who are learning how to be more observant. In addition, Campaign Shabbat provides opportunities for synagogue members to network with each other via e-mail. There are currently 69 Conservative synagogues throughout the United States and Canada participating in Campaign Shabbat. Joseph Mendelsohn, a rabbinical student at the Jewish Theological Seminary and the spiritual leader of Beth El Synagogue (Waterbury, CT), is the coordinator of the program.

Title of Synagogue Change Project: Carlebach Synagogue: expansion initiative

Sponsoring Agency: Carlebach Synagogue-New York, NY

Funding Sources: some funding from Covenant Foundation; applying for grant from Cummings Foundation

Summary of Change Initiative:

The objective of the Carlebach Synagogue's expansion initiative is to enable other synagogues around the country to implement the "Carlebach approach" to prayer services. The initiative is a response to the fact that "people come to shul for every reason except to pray" (i.e. people who do come to synagogue typically come for the sermon or the food); it is a response to the conviction that "prayer is not working" for most Jews today. The "Carlebach approach" to prayer incorporates two aspects:

- music ("feeling the melodies of the prayers", "making the prayers more alive and accessible")
- interrupting the singing to explain the meaning of the prayers (commentary beyond simple translation)

Carlebach-type services are rooted in traditional Chassidic prayers, yet they also incorporate some modern tools such as music and "spontaneity". These services are based on a model of one person inspiring others who, in turn, cause others to be inspired. The inclusion of running commentary on the services is an adaptation of the interpretive process that is already applied to *Chumash*/Torah study.

Rabbi Sam Entrator, the rabbi of New York's Carlebach Synagogue was an assistant rabbi to Rabbi Shlomo Carlebach when he was still alive and traveled with him "on the road". Now, Rabbi Entrator travels about once every other month to different synagogues (primarily Orthodox) to expose them to the "Carlebach approach" to prayer. Rabbi Entrator is hoping to get a grant to enhance the work he is currently doing; he aims to enable people in other synagogues to develop the "Carlebach model" on their own without having to rely solely on "performances" by "outsiders". With the Covenant Foundation grant, Rabbi Entrator is working with synagogues that already have adopted a "Carlebach approach" and is helping them refine their approach (e.g. the Happy Minyan in Los Angeles, the Aquarian Minyan in Berkeley). With additional funding, he hopes to make Carlebach-type prayer services more accessible to other synagogues.

Title of Synagogue Change Project: Chizuk Amuno Strategic Mission Statement Process & Campaign

Sponsoring Agency: individual synagogue: Chizuk Amuno Congregation-Baltimore, MD

Funding Sources: no outside funding; synagogue has extensive internal fundraising efforts (including a full-time development director and a full-time lay committee chair)

Summary of Change Initiative: In May, 1994, synagogue professionals and lay leaders decided to develop a mission statement ("defining who we are") and a "case" ("defining where we want to go") which would become an integral part of the congregation's 125th anniversary fundraising campaign. The case, in particular, would enable fund-raisers to inform potential donors about the planned uses of the money raised by the campaign. Objectives of the mission statement process and the campaign included the following:

- to embark on a campaign to raise endowment funds for new programming, personnel, and other recommended organizational changes and capital funds for physical plant improvements in honor of the synagogue's 125th anniversary
- to articulate the synagogue's mission statement and "define ourselves" at a critical milestone in the congregation's history (125th anniversary)
- to implement programs and make organizational changes that reflect the synagogue's mission
- to continue growing the membership of the synagogue, even after achieving full enrollment in all of the synagogue's schools (religious school, high school, day school, adult education academy, early childhood education program)

The process of developing the mission statement was facilitated by an outside consultant, Dr. Sheldon Dorph. The process involved a 32-member committee which represented every constituency in the synagogue: professional staff, board members, and representatives of all the committees and schools (early childhood, day school, religious school, adult education), and several older members who could provide "institutional memory". The 4-month process included the following components: extensive meetings of the committee, a retreat, and focus groups that attracted 200 congregants. Because of the sense of urgency of the campaign, the mission statement process was executed in a very expeditious manner. If the need for the campaign's case had not been so pressing, the change process might have included additional focus groups and the development of a long-range plan preceding the development of the case. The mission committee wrote its own mission statements in September, 1994. In September/October 1994, focus groups were conducted with congregants and additional data was collected. A preliminary mission statement was drafted in October; a final mission statement and report was released in November, 1994. Emerging from the process was the unanimous recognition that education was the driving force of Chizuk Amuno; this sentiment was expressed by everyone who participated in the mission statement process. The following institutional objectives emerged from the mission statement process:

- to create as many contexts as possible for Torah study in the synagogue
- to affirm Torah study as the historic and continuing organizing principle and centerpiece of all synagogue initiatives
- to implement our vision of our synagogue as "the education synagogue"
- to elevate congregants' awareness of the synagogue's educational focus and to consciously build synagogue programs around this educational focus

The "case" was successfully developed over the 6 months following the articulation of the mission statement (in 11/194), and has been used for fundraising purposes since 1995. Heightened awareness of and reinforcement of the mission statement has been accomplished by the publication and dissemination of appealing printed materials that convey that the synagogue is successful and clear about its goals. In addition, an engraved limestone representation of the mission statement now serves as the centerpiece in the main thoroughfare of the synagogue. So far, the campaign has been extremely successful, with a dramatic increase over voluntary participation in previous campaigns. The success of the campaign has been attributed to many factors including high standards ("You never achieve. You just up the ante."), and the active participation and support of a well-respected rabbi, an extremely capable lay committee chair who worked full-time on the campaign, and a full-time development director who came on staff by the beginning of the campaign.

Title of Synagogue Change Project: Cooperating Schools Network

Sponsoring Agency: Jewish Reconstructionist Federation (JRF)

Funding Sources: JRF and grants from the Covenant Foundation and the Bronfman Foundation. (In addition, some individual congregations' projects have been funded by grants from foundations and local federations such as the New Jersey Metrowest Federation).

Summary of Change Initiative:

The Cooperating Schools Network (CSN) provides opportunities for Reconstructionist congregations to develop expertise in a particular "value of spiritual peoplehood" and to become models of educational innovation for other Reconstructionist congregations. CSN envisions the synagogue as an intergenerational learning community with integrated education for children, adults, and families.

Specific goals of the CSN include:

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

Each of the 21 participating congregations focuses on one or more of the following "values of spiritual peoplehood": *kedusha*/ spirituality, *hidur mitzvah*/Jewish arts, *tikun olam*/ moral education, Hebrew language, *Tzionut*/Zionism & Israel, and *hokhma*/ Jewish thought and wisdom. The selected "value" serves as a "spiritual compass" for the congregation and as a thematic area of educational emphasis for the synagogue's intergenerational educational activities. The components of the CSN change process include an annual conference with members of all participating congregations' CSN committees, phone conversations with Dr. Jeffrey Schein (the national education director of the Jewish Reconstructionist Federation and the coordinator of CSN), an initial site visit by Dr. Schein during which he meets with the synagogue's CSN committee to get a visioning process underway (that focuses on one of the 'values of spiritual peoplehood'), two visioning exercises for each synagogue's CSN committee to do on its own, a meeting between Dr. Schein and each CSN committee to discuss the next steps, and the CSN committee's development of new curriculum materials and/or the implementation of existing curriculum materials. The implementation of CSN in its first cadre of synagogues began in 1993 (although one of the participating congregations, B'nai Keshet, received a grant to began a CSN-like program as early as 1990).

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

Sponsoring Agency: Auerbach Central Agency for Jewish Education (ACAJE)-Philadelphia, PA

Funding Sources: Jewish Federation of Greater Philadelphia

Summary of Change Initiative:

The Designated School Program (DSP) aims to create better synagogue schools (i.e. with evidence of more effective learning) by encouraging synagogue schools to adopt a "systems approach" to organizations. The DSP's ultimate goal is educational change in the synagogue. Underlying the "systems approach" is the theory that each component of the synagogue contributes towards the synagogue's overall educational mission.

Synagogues participating in the DSP can opt to participate in an intensive 3-year change process that includes the following components:

- 1) adopting a systems orientation with an emphasis on partnership and role-modeling the collaborative effort
- 2) creating a steering committee that is comprised of all of the synagogue's professional staff members (rabbi, cantor, executive director, educator) and representatives of different constituencies in the synagogue
The steering committee writes job descriptions and develops the school's vision and mission statement.
- 3) empowering the school committee to be a process-oriented, goal-setting, decision-making body

DSP congregations can opt to participate in the 3-year intensive consulting intervention or they can opt to participate in pieces of the program (e.g. restructuring the school committee in a way that is consistent with systems theory or adopting a systems-based approach to teacher training). All participating DSP synagogues are guided through the change process by a consultant at the Auerbach Central Agency for Jewish Education, Dr. Jane Tausig. There are currently 7 synagogues in Greater Philadelphia that are participating in the Designated School Program. Three of these congregations began the DSP change process in 1994 and completed it in 1997, one of these congregations completed the process in 1998, and three synagogues are currently in their first or second years of implementation of the change process.

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

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

Funding Sources: Grants from the Mandel Associated Foundations, the Nathan Cummings Foundation, the Covenant Foundation, and the Gimprich Family Foundation

Summary of Change Initiative:

The Experiment in Congregational Education (ECE) is an initiative that seeks to transform synagogues into "congregations of learners" (i.e. synagogue communities where Jewish education is central and where Jewish learning takes place in a deep way throughout the congregation) and "learning congregations" (i.e. communities characterized by ongoing self-reflection, shared leadership between professional and lay leaders, and continuous deliberations aimed at problem-solving and self-improvement). It aims to change the synagogue's culture and organizational structure in order to make Jewish learning central to the life of the synagogue. The following components form the common pattern which guide the activities of all participating ECE synagogues:

- 1) an educational task force of 20-30 professional lay leaders that meets 6-8 times per year over a period of 2-3 years
- 2) a leadership team of 5-10 people that guides the work of the task force
- 3) an ECE advisor who spends 20 days per year assisting the leadership team and task force of each synagogue
- 4) study retreats (*kallot*) for all of the leadership teams from each of the participating congregations (five times during the first three years of the project)
- 5) ongoing evaluation by ECE staff researchers

At each participating congregation, the ECE task force engages in "readiness assessment", a visioning process, team-building, implementation and analysis of "community conversations", planning and implementation of early innovations, reflection on "best practices", and planning and implementation of major initiatives. While the road map of the ECE change process looks the same for all participating congregations, the journey looks different for each synagogue; ECE provides the template of steps each synagogue has to take, but the "bow" and the "outcomes" are expected to look different at each site. Each of ECE's 9 advisors works with one or more of the participating synagogues to help the synagogue task forces implement the change process in their sites and to trouble-shoot as needed. Dr. Isa Aron, the coordinator of ECE, is one of the advisors.

Planning for the ECE initiative was precipitated by Sara Lee's educational consulting work with Congregation Beth Am (in Los Altos Hills, CA) and her understanding that in order to effect true changes in supplementary school education, synagogues needed to be changed in systemic and holistic ways. The kick-off event for ECE was a conference in Malibu in 1993 entitled, "Reconceptualizing Congregational Education". Papers presented at this conference and other commissioned works were published in 1995 in Aron, Lee, and Rossel's book, A Congregation of Learners: Transforming the Synagogue into a Learning Community.

There are currently 14 Reform congregations around the country that are ECE participants. In addition to the 2 'proto' synagogues that were "part of ECE before there was an ECE" (Congregation Beth Am and Leo Baeck Temple), there were 5 *vatikim* in ECE's first cadre that began to participate in ECE in 1993. In 1997, 7 *chadashim* synagogues constituting ECE's second cadre began their implementation of the ECE change process.

Title of Synagogue Change Project: Friday Night Alive

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

Funding Sources: Grant from the Jewish Continuity Initiative of the Jewish Federation of Greater Philadelphia and private donation from CMS Companies (CMS Foundation)

Summary of Change Initiative:

In 1997/1998, Friday Night Alive featured participatory innovative Friday night Shabbat services at 6 synagogues in the Greater Philadelphia area. The objectives of Friday Night Alive include: to enrich Jewish synagogue life in Greater Philadelphia by conducting Friday night "song and spirit" services that are similar to those at B'nai Jeshurun on Manhattan's Upper West Side, to expose people to the possibilities of what Jewish services have to offer and to the possibility that they can be exciting, and to inspire rabbis and congregations to explore more innovative and participatory ways of spiritually enhancing their prayer services. It is the ultimate goal of Friday Night Alive to inspire synagogues to conduct their own participatory services, not just to host Friday Night Alive services once a year or to become "Friday Night Alive synagogues". In 1997/1998, some of the Friday Night Alive services were led by B'nai Jeshurun staff (Cantor-Keyboardist Ari Priven and Rabbi Yael Ridberg) and some of the Friday Night Alive services were led by Shabbat Unplugged, a group of rabbinically-trained musicians who are students or graduates of the Reconstructionist Rabbinical College of Wyncote, PA. The Friday Night Alive services are characterized by participatory sing-along melodies interspersed with traditional *nusach*, instrumental music, singing rabbis in lieu of a cantor as *shaliach tzibur*, dancing in the aisles, and the use of the siddur "Service of the Heart". This siddur was specially designed for Friday Night Alive by Joe Lewis and Ellen Bernstein; it includes modern English translations and commentaries, convenient Hebrew phrasing, transliterations, instructions (e.g. when to stand, sit, and bow), and "Singlish" (singable English rhymed translations of the prayers). While the 6 synagogues that participated in Friday Night Alive in 1997/1998 were all Conservative (or Conservative/Reconstructionist), 6 of the participating synagogues in 1998/1999 are Reform and 6 are Conservative.

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

Sponsoring Agency: Jewish Continuity Commission of UJA-Federation of New York

Funding Sources: UJA-Federation Continuity Commission, which receives funds from the UJA-Federation of New York's annual campaign. In 1998/1999, \$3.5 million was allocated to the Continuity Commission from the Federation's \$120 million annual campaign.

Summary of Change Initiative:

The Continuity Commission was established in July, 1993, in direct response to the recommendations of UJA-Federation of New York's Strategic Plan. The Strategic Plan recommended that a Continuity Commission be formed to perform several functions related to Jewish continuity, including the implementation of a grants program that would "stimulate competitions in excellence" in all types of Jewish communal institutions (e.g. synagogues, JCC's, Hillels, and schools). According to John Ruskay, the first director of the Continuity Commission and the current Chief Financial Officer of the Federation, one of the overall objectives on the Continuity Commission is to provide solutions to the Jewish community's "continuity crisis" by expanding the focus beyond Jewish education as the single solution to the crisis and by working towards the creation of "inspired and inspiring" communities.

The objectives of the Continuity Commission's Grants Program include: "institutional transformation" and "institutional strengthening" (to strengthen or transform synagogues and other Jewish institutions into more compelling and dynamic communities of Jewish living and learning), to catalyze change in Jewish institutions (including, but not limited to synagogues), to generate institutional growth at the grassroots level, to provide resources to Jewish institutions in the New York Jewish community with an emphasis on Jewish education and identity development, to get Jewish institutions to think strategically about how they want to look in the future, to have a positive impact on the attitudes and behaviors of individuals in Jewish institutions, and to catalyze change in the UJA-Federation of New York and the New York Jewish community. According to Dr. Alisa Rubin Kurshan, the current director of the Continuity Commission, the Grants Program funds institution-wide initiatives as opposed to programs. It is premised on the belief that institutions best know how to transform themselves into compelling and inspiring Jewish communities. Thus, the Commission does not provide a specific template of change; each institution is required to undergo a serious strategic planning process which takes into account its unique institutional profile. Each institution's lay and professional leaders are required to develop and buy into their own vision of change and to identify their own creative and bold initiatives. However the Commission conducts public briefings every year regarding both the content and process of change, providing institutions with guidelines and concrete suggestions for their initiatives. Beginning in July, 1998, the Request for Proposals (RFP) invited applicants to define their initiative by one of the following "content-based goals or strategies of change": "Toward a Spiritual Community", "Toward an Inclusive Community", "Toward a Learning Community", "Toward Renewing Israel's Role in the Life of the Community", "Toward Enriching Jewish Culture in a Community", or "Toward a Social Action Oriented Community". For the first four years of the Grants Program (1994/1995-1997/1998), the Continuity Commission awarded three-year grants for large-scale institutional grant initiatives (with slightly lower figures for target-population grant initiatives) according to the following formula: Year One-100% funding (up to \$60,000 per initiative), Year Two-80% funding (up to \$48,000 per initiative), Year Three-50% funding (up to \$30,000 per initiative). For initiatives beginning in 1998/1999, the Commission awarded four-year grants according to the following new formula: Year One-80% funding (up to \$48,000 per initiative), Year Two-100% funding (up to \$60,000 per initiative), Year Three-60% funding (up to \$36,000 per initiative), Year Four-40% funding (up to \$24,000 per initiative).

Since the Grants Program began in 1994, 26 synagogue initiatives received grants from the Continuity Commission: 22 individual synagogues, 3 grants to denominational movements, and 1 community initiative that is a collaboration of 7 synagogues in Brownstone Brooklyn. The number of synagogue initiatives receiving new grants since 1994 has ranged from 2-7 per year. The following are some examples of synagogue initiatives that have received funding in recent years: experiential adult Jewish education for the unaffiliated, healing prayer services, intergenerational Jewish education for unaffiliated Jewish gays and lesbians, and community-building for new members and single adults.

Title of Synagogue Change Project: Initiative in Congregational Education

Sponsoring Agency: UJA Federation of Greater Washington and Board of Jewish Education (BJE) of Greater Washington (including donations from lay leaders/ philanthropists)

Funding Sources: UJA-Federation of Greater Washington

Summary of Change Initiative:

The Initiative in Congregational Education marks the beginning of a "comprehensive partnership" between UJA-Federation, the Board of Jewish Education, and synagogues in the Greater Washington area. It was introduced to Jewish education professionals and lay leaders at a kick-off event in the fall of 1998. The goals of the initiative include:

- to provide funding to congregational schools to enable the development of programs that meet agreed-upon criteria
- to provide resources that will help students and families view religious school as a place to learn to live and practice Jewish values (rather than as a "drop-off" Hebrew school)
- to gather and analyze data related to congregational schools for the purpose of sharing "best practices" and identifying areas of mutual concern
- to help synagogues strengthen their ability to be vibrant centers of Jewish life for congregants (by strengthening their schools)
- to strengthen the synagogue/BJE/UJA-Federation partnership and to foster a spirit of mutual trust around these institutions' shared educational vision
- to encourage and enable the Greater Washington Jewish community to work together on issues relating to synagogue schools and Jewish education

Beginning in 1999, each participating synagogue school will be receiving a grant of \$1,000-\$4,000 based on the number of students in the school. The grant process is non-competitive; all congregations that apply for grants are eligible to receive money. The following are the list of grant categories for the Initiative in Congregational Education:

- Jewish family life education
- teacher training and teacher recruitment
- curriculum specialists (in such areas as music, art, drama, Hebrew language, *tefillah*, social studies, and special needs)
- teen programs
- programmatic bridges between formal and non-formal education (through such modes as Jewish camping, retreats, or other modes of experiential education)
- purchase of educational materials (to support new programs)
- civics/social action/*tzedakah* curriculum

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

Sponsoring Agency: Koret Foundation

Funding Sources: Koret Foundation, with matching funds from participating synagogues

Summary of Change Initiative:

The Koret Synagogue Initiative (KSI) provides funding for participating synagogues to hire program directors (or assistant rabbis with programming responsibilities) who develop and implement programs aimed at building the Jewish identity and commitment of targeted segments of the synagogue population (such as young adults, women, families, non-members, etc.). Program directors aim to enhance synagogue life and promote synagogue change through the implementation of outreach and inreach programs. KSI's immediate objective is to "test the hypothesis" that the addition of a program director (or assistant rabbi with programming responsibilities) would enable each of the participating synagogue to do a much better job of strengthening its members' and non-members' Jewish identity and commitment, "thereby demonstrating that synagogues can play a critical role in the revitalization of Jewish life in America". KSI's short-term goals include: to build capacity in synagogues through the addition of a program director (or assistant rabbi) on staff, to provide a vehicle for institutional transformation, to make structural changes in the synagogue as an institution by changing the culture of the synagogue and its leadership, and to enable synagogues to reach their potential for positively affecting members' and non-members' Jewish identity by virtue of its three key roles: community-building, religious life, and education. KSI's long-term goals include: to enable the synagogue to become an agent of change for the San Francisco Jewish community at large, to enable the synagogue to assume its place with other Jewish organizations in promoting Jewish continuity and strengthening Jewish identity, and to serve as a national model so that funders can see how even a relatively small amount of money can make a big difference in how synagogues function.

Koret's vision is "more of a process vision", premised on the assumption that synagogues will do a better job of enhancing congregants' Jewish identity if they have increased personnel capacity (the addition of a program director position on staff). Koret does not dictate the kind of programming that each synagogue should implement, although most participating synagogues have some type of lay advisory committee which oversees the work of the program director. Beginning in 1998/1999, the KSI will expand its activities to include management consultation, training, and technical assistance to synagogues which will be provided by staff at the Koret Foundation.

The Koret Foundation initiated KSI in 1994. Prior to 1994, Koret functioned mainly as a foundation that reviewed grant proposals and funded various projects in Jewish institutions and other non-profit organizations. The KSI is part of Koret's new approach to become more proactive in such areas as Jewish identity and synagogue life. Since its inception in 1994, KSI has funded 8 synagogues in the San Francisco Bay Area (3 Conservative and 5 Reform). The first round of KSI began in 1994, with 4 synagogues each receiving \$45,000 per year (for three years) for the program director's salary and a programming and publicity budget. In years 1-3, each synagogue was expected to provide matching funds in the amount of \$15,000 per year. In years 4-6, Koret continues to provide funding to the synagogues but at a decreasing rate. In year 7, the entire budget for the program director, programs, and publicity is supposed to be funded by the synagogue. For the second and third round of participating KSI synagogues (beginning in 1997), Koret provided \$22,000 per year per synagogue (for the first three years) for a half-time program director's salary and a programming and publicity budget; each synagogue is expected to provide matching funds in the amount of \$12,000 per year.

Title of Synagogue Change Project: LA Council on Jewish Life: Synagogue Funding Program

Sponsoring Agency: Council on Jewish Life of The Jewish Federation of Greater Los Angeles

Funding Sources: Jewish Community Foundation

Summary of Change Initiative:

Founded in 1974, the Council on Jewish Life is under the auspices of the Jewish Federation of Greater Los Angeles' Planning and Allocations Department. The Council's activities include: convening community discussions on emerging issues of interest to the Jewish community, recommending new policies and programs, and enabling synagogues and other Jewish institutions in Greater Los Angeles to implement these new policies and programs. These activities aim to strengthen the Los Angeles community's commitment to Jewish continuity.

The Synagogue Funding Program, which began in 1981, administers grants from the Jewish Community Foundation to synagogues in Greater Los Angeles. Approximately two thirds of the \$100,000 provided by the Jewish Community Foundation each year is allocated to first-year programs and one third is allocated to second-year programs. The overall goal of the Synagogue Funding Program is to serve the Jews of Los Angeles by building a partnership between the Federation and the religious community. Through the Synagogue Funding Program, the Council on Jewish Life is able to stimulate programs, provide seed money, and encourage collaboration among institutions. The criteria for programs funded by the Council's Synagogue Funding Program have evolved over time. The Council seeks and support programs that are new and innovative, can be replicated in other settings, stimulate collaborations between synagogues and other agencies, promote closer synagogue/Federation relations, and foster a deeper connection to Judaism and Jewish living. In the 1980's, the Council primarily provided seed funding to programs that were new and innovative. Now, the Council seeks programs that involve inter-institutional collaborations and that focus on deepening individuals' Jewish commitments. It primarily funds programs that address the needs of "under-served" members of the Jewish community (e.g. former Soviet Jews) or that promote Jewish continuity (e.g. Jewish Family Education and teen programming)

Since its inception in 1981, the Synagogue Funding Program has provided funding to hundreds of synagogue programs. Between 1991-1997, 50 synagogues received grants through the Synagogue Funding Program (not including grants for collaborative initiatives). Orthodox, Conservative, Reform, Reconstructionist, and unaffiliated synagogues have all been recipients of grants. While there is no set minimum or maximum grant award per program, 1997 grants ranged from \$2,500 to \$10,000 per synagogue per program per year. Similarly, there is no set number of synagogues that can be offered grants in any given year; in recent years, 12-35 synagogues have received grants each year. Most programs that meet the criteria receive grants.

The following are some examples of programs funded by the Council on Jewish Life's Synagogue Funding Program: a family education program targeted to unaffiliated mixed-faith couples and their children at a Reform synagogue, a bi-monthly support group for gays and lesbians at a Conservative synagogue, a "Torah through Drama" program for senior citizens at a Chassidic shul, a support group for parents who have children with Attention Deficit Hyperactive Disorder (ADD-ADHD) at a Conservative synagogue, and a one-day seminar of lectures and workshops on "the mitzvah of mourning" at a Reconstructionist synagogue.

While staff at the Council on Jewish Life admit that the Synagogue Funding Program primarily deals with "smaller scale changes", they believe that these programs do make a difference in synagogues and in the lives of program participants. Furthermore, they note that the Council on Jewish Life has been involved in mobilizing some larger scale community-wide changes with such programs as the Israel Experience for teenagers.

Title of Synagogue Change Project: *Mashkon*: Blueprint to Transform Congregational Education

Sponsoring Agency: Board of Jewish Education (BJE) of Greater Washington and the UJA-Federation of Greater Washington

Funding Sources: Jewish philanthropists with children in Jewish supplementary schools in the Greater Washington area (the Bermans and Gelmans), in partnership with the BJE and the UJA-Federation of Greater Washington

Summary of Change Initiative:

In 1996/1997, a small group of concerned Jewish parents in the Greater Washington area (including some philanthropists) began to examine the reasons behind the problems of congregational school education. They turned to the Board of Jewish Education and the UJA-Federation of Greater Washington and asked:

- What are the essential tools needed to transform the educational landscape of the congregational school system?
- Can we make a significant difference in the spiritual lives of thousands of Jewish children?
- What if the resources were available to effect such transformations in children's lives and in synagogues?

In response to these challenges, the BJE began to forge a new partnership with UJA-Federation, congregational schools, rabbis, educators, and communal agencies. The first step was to create a plan or "blueprint" that provides an overall model to transform congregational Jewish education. *Mashkon* is designed to equip teachers with the skills and knowledge they need to bring elements of wonder, faith, and the search for meaning into their religious school classrooms. The effort began with the implementation of five pilot programs extracted from the larger blueprint. These carefully designed pilots represent a cross-section of programs that address some of the key concerns of Jewish parents in the Greater Washington Jewish community. Each of the following pilots was tested, evaluated, and modified in the first year (1997/1998):

- 1) **"To Create A Context of Meaning: A Curriculum and Teaching Training Module":**
an initial training unit on God challenges teachers to confront the difficult issues in their own lives concerning faith and meaning and enables them to transmit religious concepts in a meaningful way in the classroom
- 2) **"Jewish Teen Institute":**
a Wexner-Heritage-style program for teens consisting of highly stimulating, interdisciplinary mini-courses integrated into the school's ongoing programs
- 3) **"Sh'lom Kitah"**
an on-the-job teacher training program to provide the techniques needed to integrate students with learning difficulties successfully into the regular classroom
- 4) **"Beyond Arts and Crafts: A Jewish Family Life Education Curriculum for Young Children":**
an engaging, age-appropriate Jewish Family Education curriculum to help early childhood students and parents understand and experience the richness of Jewish holidays
- 5) **"Teachers' Center Web Site":**
an electronic resource center with the best print, video, audio, and software materials available for educators in formal and informal Jewish educational settings

Additional pilot initiatives that began to be implemented in 1998/1999 are the *Morasha*: Florence Melton Mini-School for Teachers and the *Bet Midrash* bi-monthly study sessions and end-of-year retreat for principals. Each of the pilot initiatives addresses an aspect of *Mashkon*'s larger vision: to incorporate into the synagogue religious school's curriculum age-appropriate programs that specifically deal with "Judaism's understanding and response to the mysteries of life and the deepest concerns of the human soul". Since its inception in 1997, there have been 25 synagogues (Conservative, Reform, Reconstructionist, and unaffiliated synagogues from throughout the Greater Washington area) involved in one or more of *Mashkon*'s five institutional pilot initiatives. Rather than transforming congregational education via a centralized large-scale initiative, *Mashkon* seeks to transform Jewish education in synagogues by transforming one classroom at a time.

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

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

Funding Sources: McKinsey consultants donate their time on a pro-bono basis.

Summary of Change Initiative:

The McKinsey Project's immediate short-term objective is to overcome barriers to change within synagogues by making synagogue leadership aware of the need for change, creating adequate administrative infrastructure for change, ensuring economic support for new initiatives, and gaining consensus among clergy, lay leaders, and other congregants. McKinsey's longer-term objectives include: to re-establish the synagogue as a vibrant center of Jewish living and learning and to ensure ongoing Jewish continuity and Jewish community. The McKinsey project provides a "value-neutral" process for enabling synagogues to achieve their own site-specific visions rather than utilizing a "cookbook approach" or imposing a specific change agenda. The process is modeled after McKinsey's strategic planning process for its other clients. Based on learning from its consulting work with clients in the business world, McKinsey's strategic planning process incorporates the following elements: working in teams, learning by doing, skilled facilitation, focusing on vision and objectives, and maintaining high energy throughout the process. Approximately once per month over the course of a year, participating synagogue teams (consisting of the rabbi, administrator, and 3-4 lay leaders) attend 9 workshops with McKinsey consultants and other participating synagogue teams. Each meeting starts out with a 20-30 minute session for all of the teams together, during which the topic for the evening is introduced. Then, the participants go into break-out sessions for approximately an hour, during which each individual synagogue team meets with its assigned McKinsey facilitator. The last segment of the meeting is another 20-30 minute session for the whole group, to give the different synagogue teams an opportunity to "cross-pollinate" and share ideas. The main program sessions are each devoted to one of the following topics:

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

Between each session that is facilitated by McKinsey consultants, each synagogue team is expected to meet on its own and to do some on-site work related to the previous program session's topic.

This project was initiated in 1993 by McKinsey consultants after some discussions with the UJA-Federation of New York's Continuity Commission. In the first year of the implementation of this project, ten McKinsey consultants volunteered their time to this pro-bono project. The first group of 11 synagogues (2 of which dropped out) participated in strategic planning workshops during the calendar year 1994. The next group of 7 synagogues (1 of which dropped out) participated in workshops during the academic year 1996/1997. The third group of 7 synagogues participated during the academic year 1997/1998. The 21 synagogues that have participated in the McKinsey Strategic Planning Workshops represent all the denominations: Orthodox, Conservative, Reform, Reconstructionist, and unaffiliated synagogues in the New York metropolitan area.

Title of Synagogue Change Project: National Jewish Outreach Program initiatives

Sponsoring Agency: National Jewish Outreach Program (NJOP)-New York, NY

Funding Sources: donations to the National Jewish Outreach Program

Summary of Change Initiative:

The overall objective of the National Jewish Outreach Program (NJOP) is to transform synagogues into outreach organizations. Working with individuals across the denominations, but primarily through Orthodox synagogues, NJOP implements the following initiatives (some of which may be considered synagogue change initiatives):

- 1) Crash Course in Hebrew Reading: to empower synagogue members who are "dormant" to learn Hebrew. NJOP screens and hires teachers, as well as providing teaching specifications, handbooks, and an instructional videotape. This program has reached 105,000 individuals in 2,100 synagogues around the country.
- 2) "Shabbat Across America"/ "Turn Friday Night Into Shabbat": to enable synagogues (primarily Orthodox) around the country to implement interactive Friday night programs (services and dinner) during which participants can interrupt the service or meal to ask questions. While synagogues implement the Friday night programs on their own, NJOP provides specifications, handbooks, and an instructional videotape. This program has reached 70 congregations around the country.
- 3) Beginners/Learners Services: to enable synagogues (primarily Orthodox) around the country to implement a traditional Shabbat service that is geared to beginners, in which participants do the *dvar Torah* (in lieu of a rabbi's sermon) and in which participants can interrupt the service to ask questions. These services are an opportunity for synagogues to "mainstream" people. NJOP provides specifications, handbooks, and an instructional videotape.
- 4) Outreach Directors in Orthodox Synagogues: to place full-time outreach directors in Orthodox synagogues. So far, NJOP has placed 4 full-time outreach directors and 1 part-time outreach director in Orthodox synagogues around the country: California, Florida, New Jersey (West Orange), and New York (Long Island and Brooklyn). NJOP provides a matching grant of \$25,000 for each full-time outreach director.

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

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

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

Summary of Change Initiative:

The objectives of the L.E.A.D. Rabbinic Fellowship Program include: to develop "leadership" and "vision" among younger Orthodox rabbis through project-based training, to develop a core of rabbinic leaders who can serve as mentors to other rabbis, and to have an impact on national Orthodox organizations (i.e. to change policy in the Orthodox movement by bringing some younger rabbis into leadership positions in Orthodox organizations). Operational objectives of the Rabbinic Fellowship Program include: to provide formal in-service training to rabbis based on well-known leadership development models in business and the military, to implement projects in the synagogue and in the local Jewish community which would serve as a training "laboratory" for the participating rabbis, and to create a professional esprit between and among the participating rabbis (so that rabbis feel less alienated which, in turn, will transform synagogues because rabbis will network with each other about projects, programs, and sermons).

The 15 Rabbinic Fellows who participate in this program attend 4 major training sessions over the course of 2 years (one session per semester). Topics covered in these training sessions include: conflict management, TQM (Total Quality Management), strategic planning, change management, negotiation skills, relationship management, and communication skills. The training sessions give Rabbinic Fellows the opportunity to meet with executives from Jewish communal organizations, business executives, and senior rabbis. All Rabbinic Fellows are required to undertake two local projects, one within their synagogues and one outside of their home congregations in collaboration with local Jewish community organizations (e.g. local JCCs, Federations, or campus groups). These projects are supposed to effect change in the synagogue and in the local Jewish community. Some examples of projects include: educational programs on domestic abuse and the establishment of an abuse hotline, Jewish educational programs accessible to the learning disabled, and educational programs targeted to FSU (former Soviet Union) immigrants.

Dr. David Schnall, who is part of the leadership of the Orthodox Caucus and is the Herbert Schiff Professor of Management and Administration at the Wurzweiler School of Social Work at Yeshiva University, consults with each Rabbinic Fellow on an as-needed basis. A variety of other specialists work with the Rabbinic Fellows at each of the professional development training sessions. Dr. Schnall conceived of the program in September, 1995 and applied for a grant from the UJA-Federation of New York's Continuity Commission in 1996. The 15 rabbis who are currently Fellows in the program represent 15 Orthodox synagogues around the country and in Canada. They have each committed to participate in this program for two full years, from January, 1997 to January, 1999.

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

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

Funding Sources: Pilot program funded by a grant from the UJA-Federation of New York's Continuity Commission; Consulting fees of part-time facilitators funded by UAHC; UAHC plans to fund PSC through its operating budget after the grant runs out in 1999.

Summary of Change Initiative:

The objectives of PSC include: to build partnerships and relationships among synagogue leaders, to develop leadership skills among synagogue professionals and lay leaders, to transform the temple leadership's job description and experience from a "corporate" model to one that embodies the values of Judaism and the religious values and purposes of their synagogues, and to improve synagogue leadership as a lever for creating large-scale synagogue change. PSC's vision of synagogue life is a new model of synagogue board service that incorporates values-based decision-making, team-based leadership, and personal growth. It envisions a synagogue governance structure that embodies the vision of a synagogue as a nurturing covenantal community which is rooted in Jewish values; it envisions board experiences for lay leaders and professional that are more spiritual and less "corporate".

PSC engages synagogue leadership teams in three years of systematic training, supervision, and inspiration to broaden leaders' Jewish literacy, Jewish "citizenship" (lifestyle and role-modeling), spiritual awareness, individual goal-setting and management abilities. The PSC training program includes the following elements: observation and feedback at synagogues, study guided by an integrated curriculum, retreats, an ongoing facilitating/consulting process, "celebration", and evaluation. Each participating synagogue is required to assemble a team of 6-8 people, including the rabbi, the president, and present and future lay leaders. Generally, each team consists of 2 professionals and 4-6 lay leaders. Each synagogue team meets once per month with an assigned facilitator from UAHC/GNYCRS; the facilitators have expertise in areas such as organizational behavior, social work, education, and communications. The specific content of monthly team meetings varies from synagogue to synagogue. Although the Experiment in Congregational Education (ECE) is not formally connected to PSC, two of the facilitators have been involved in ECE; thus, all PSC synagogues are engaged in ECE activities such as "visioning" and "community conversations". All meetings incorporate Jewish text study. While the original intention was to have two retreats per year for all participating synagogue teams, the current process has been revised to reduce the number of retreats because of the divergent needs of the synagogues involved. In addition to meeting monthly with the synagogue teams, all of the facilitators also meet once per month with Richard Abrams (Director of PSC at UAHC), Rabbi Peter Schaktman (Director of GNYCRS), and Rabbi Julie Spitzer (Assistant Director of GNYCRS). Four Reform synagogues in the New York metropolitan area have been participating in the PSC pilot since its kick-off retreat in 1997.

Title of Synagogue Change Project: Synagogue 2000: A Trans-Denominational Project for the Synagogue of the 21st Century

Sponsoring Agency: Synagogue 2000 is an independent organization; Principal Investigators' offices are housed at the University of Judaism (Los Angeles) and Hebrew Union College-Jewish Institute of Religion (New York)

Funding Sources: Grants from the Nathan Cummings Foundation, Steven Spielberg's Righteous Persons Foundation, and the Shirley and Arthur Whizin Trust

Summary of Change Initiative: According to Rabbi Larry Hoffman and Dr. Ron Wolfson, the individuals who initiated Synagogue 2000, the objectives of Synagogue 2000 include: to re-energize and "respiritualize" the American synagogue, to transform the synagogue from a place that caters primarily to children to a place of Jewish spiritual growth for adults of all ages, to change the synagogue from a place of "old-world ethnic appeal" to a place that has a "spiritual message" for all who seek meaning, to make synagogues into "spiritual centers" where people can pursue their Jewish journeys and find God's presence, to make synagogues more religious and less institutional, and to make synagogue life more meaningful and relevant to American Jews. Synagogue 2000 envisions the synagogue of the 21st century to be the spiritual center of members' lives, where an impersonal synagogue is changed into a place of warmth and welcome, where the way in which synagogues "do their business" is changed from hierarchical and bureaucratic to personally enriching, and where prayer services are "compelling and compassionate". In its attempt to "re-spiritualize" all aspects of synagogue life, Synagogue 2000 targets the following areas: 1)Prayer, 2)Healing, 3)Good Deeds/Social Justice, 4)Study/Learning, 5)Institutional Change, and 6)Ambiance/ Synagogue Design/ Sanctuary Space. These 6 key themes form the acronym PISGAH: Prayer, Institutional Change, Study, Good deeds, Ambiance, and Healing. While the overall objective of Synagogue 2000 is to "respiritualize" synagogues, the specific definition of what it means to "respiritualize" and the strategies of how to "respiritualize" are determined by each synagogue within the broad context of the definition of "Jewish spirituality" provided by Synagogue 2000. Ultimately, each synagogue should work on all 6 points of the PISGAH, but each synagogue started out its change process by focusing on either "prayer" or "healing"; all synagogues are also working on "ambiance".

The "theory-in-use" for Synagogue 2000's change process is that within each synagogue, a "core group" of 5-7 people will radiate its enthusiasm, energy, and knowledge to a larger "change team" of 20-30 people (consisting of clergy, lay leaders, 'movers and shakers' and 'peripheral' congregants) who will, in turn, inspire the same enthusiasm throughout the synagogue infrastructure and to members and potential members of the synagogue. Then, it is hoped that the process will be reproduced at the city, regional, and national level. Each participating synagogue's "core group" of 5-7 people attends an annual retreat in Ojai, CA. Retreats incorporate a team approach and "experiential learning characterized by intellectual seriousness and emotional intensity". At the first retreat for Synagogue 2000's 16 pilot synagogues (December, 1996), the core groups were given a set of curriculum materials ("itinerary") on one area of emphasis ("track")-either "Prayer" or "Healing". Each "itinerary" or curriculum binder included instructional materials with agendas, process techniques, text-based study materials, resources, and suggested ways of conducting meetings throughout the year. After the 1996 retreat, each synagogue's "core group" met approximately once per month with the rest of its synagogue "change team" using the "Prayer" or "Healing" curriculum itinerary as a guideline for each meeting. In addition, each synagogue's "change team" had to implement "low-hanging fruit" projects- concrete and manageable projects that contributed towards the synagogue's ultimate goal of respiritualizing the synagogue through the route of prayer or healing. The theme of the second retreat for the 16 pilot synagogues (December, 1997) was "Respiritualizing the Infrastructure of the Synagogue". At the retreat, each synagogue's "core group" was given a new set of curriculum materials ("itinerary") for the following year's "change team" meetings. The "itinerary" for 1998 included a choice of four possible routes for respiritualizing the synagogue: 1)Marketing, 2)Membership Process, 3)Jewish Journey Groups, and 4) Track-Deepening (continuing to focus on the "prayer" or "healing" track from the previous year. During Year 1 (1996/1997), each of the 16 synagogue teams was assigned a liaison from Synagogue 2000's liaison team; most of these liaisons had other full-time jobs and just provided advice to congregations on an as-needed basis. In Year 2 (1997/1998), Adina Harnik and Ellen Franklin were hired as full-time project associates; they each have ongoing, regular contact with the 16 pilot synagogue teams.

Title of Synagogue Change Project: Synagogue Initiative Program (SIP)

Sponsoring Agency: Commission on Jewish Education (CJE) of the Jewish Federation of Greater Hartford

Funding Sources: Endowment Foundation of the Jewish Federation of Greater Hartford

(Note: *La'atid*, the new synagogue change initiative that is an outgrowth of SIP, is receiving grant support from the Jewish Federation of Greater Hartford, the Endowment Foundation of the Jewish Federation of Greater Hartford, and the Covenant Foundation).

Summary of Change Initiative:

The Synagogue Initiative Program (SIP) envisions the synagogue as an inclusive community in which all constituents are engaged in the planning and implementation of the synagogue and supplementary school's vision, mission, and programs. Furthermore, it envisions the synagogue as a community that is focused on developing a strong sense of Jewish identity in all of its members by providing opportunities for Jewish living and learning for people of all ages. SIP's objectives include nurturing "a strong sense of Jewish identity, knowledge, and living" in synagogue members of all ages and "re-engineering" synagogues and supplementary schools by creating partnerships among a broad base of professionals and lay leaders and engaging all constituents in the planning and implementation of the synagogue and supplementary school's vision, mission and programs. SIP also aims to make the supplementary school a "pivotal core" of the congregation, to create a synagogue atmosphere that is conducive to Jewish educational pursuits at all levels, and to train professional and lay leadership to be able to continue the process of change. An underlying assumption of SIP is that the most successful synagogue schools are those that are viewed as central to the concerns and mission of their host synagogues. Consistent with the theory of "systems change", the school and synagogue must both regard themselves as integrated parts of a greater whole.

The SIP process incorporates the following components:

1) Initiating the Systems Change Process:

- formation of a SIP committee in each synagogue, consisting of the rabbi, cantor, principal, teachers, and lay leaders representing various committees
- workshops and conferences related to synagogue/school systems change and Torah study
- survey of the synagogue's structure and needs
- workshops aimed at developing the synagogue's vision, mission statement, and action plans
- ongoing planning and collaboration among a broad base of the synagogue's constituents
- SIP committee meetings with CJE consultants approximately once every other month
- SIP sub-committee meetings with CJE and outside consultants approximately once per month
- retreats for 10-15 people from each synagogue approximately twice per year
- mini-courses on synagogue change and leadership development at Hebrew College's Hartford Branch

2) Implementation and Experimentation:

implementation of the synagogue and school's action plan which incorporates new experimental approaches and which reflects the vision and goals of the synagogue and school

3) Professional and Lay Leadership Development:

ongoing training and modeling through workshops, retreats, and courses for synagogue lay leaders and professionals to enable them to facilitate all aspects of SIP,

4) Evaluation:

ongoing formative evaluation process and summative evaluation coordinated by CJE in collaboration with SIP institutions

SIP is a trans-denominational change initiative for synagogues in the Greater Hartford area. Its 2 pilot congregations (one Conservative and one Reform) began to participate in the SIP process in 1996/1997. Since its inception, Sandy Dashefsky has been the coordinator and primary consultant to the SIP congregations.

Title of Synagogue Change Project: Synagogue Leadership Initiative (SLI)

Sponsoring Agency: UJA-Federation of Bergen County and North Hudson

Funding Sources:

Year 1: Taub Foundation

Year 2: Taub Foundation and the UJA-Federation's Continuity Commission

Summary of Change Initiative:

The Synagogue Leadership Initiative's planning process began in August, 1997 with the following objectives in mind: to strengthen synagogues in the Bergen County/North Hudson Jewish community, to develop strategies to address challenges confronting synagogues, to engage community leaders in tackling the challenges facing synagogues, to crystallize the mission of each participating synagogue, to provide leadership development opportunities for professional and lay leaders in synagogues, and to empower synagogues to transform the lives of Jewish individuals, Jewish families, and the Jewish community. The Synagogue Leadership Initiative envisions synagogues as caring, supportive communities which are centers of spirituality, lifelong learning and community (*Beit Tefillah, Beit Midrash, and Beit Knesset*).

In its planning phase (1997/1998), the Synagogue Leadership Initiative encompassed the following components:

- leadership consultation meetings which encouraged synagogue leaders to begin a process of self-reflection by asking such questions as, "What do I want my synagogue to look like?"

- a spring symposium (held 3/22/98), which brought together 145 rabbis, congregational presidents, and other significant professional and lay leaders representing 39 of the Federation's 50 synagogues to explore the vision of the synagogue as an institution that can transform the lives of individual Jews, reach the Jewish family, and shape the Jewish community

The symposium included a keynote address by Rabbi Saul Berman of Yeshiva and Columbia Universities and workshops focused on "translating the vision of the synagogue into reality" which highlighted synagogues that view themselves as having had successful change. The Symposium offered workshops on the synagogue as a *Beit Midrash*, as a *Beit Tefillah*, and as a *Beit Knesset*.

- a seminar on synagogue self-assessment (held on 5/26/98)

A total of 44 synagogues in the region, from across all the denominations (Orthodox, Conservative, Reform, Reconstructionist, and unaffiliated), participated in at least one component of the Synagogue Leadership Initiative's pilot phase in 1997/1998: leadership consultation meetings, the symposium (3/22/98), and/or the self-assessment seminar (5/26/98).

Note: Under the leadership of Judy Beck, the new director of the Synagogue Leadership Initiative as of spring '98, the initiative will be undergoing substantial revisions in 1999. It is likely that the initiative will move away from a "frontal approach" to synagogue change and that it will shift its focus beyond "one-shot" conferences and symposiums. The Initiative projects the establishment of collaborative programs, consultative services, and ongoing workshops.

Title of Synagogue Change Project: Whizin Institute for Jewish Family Life

Sponsoring Agency: Whizin Institute for the Jewish Future at the University of Judaism-Los Angeles, CA

Funding Sources: Participants pay for accommodations and for class tuition for the summer institute. The Whizin Institute provides small grants to some synagogue teams. Individual synagogues often fund their team members. Some local communities also provide financial assistance.

Summary of Change Initiative:

In 1989, Shirley and Arthur Whizin endowed the Whizin Center for the Jewish Future through a \$4 million gift to the University of Judaism (Los Angeles, CA). The Whizin Center's mission was to create 3 academic institutes within this center that would explore the three areas of the family, the synagogue, and the Jewish community. The Whizin Institute for Jewish Family Life is the academic institute devoted to exploring the family. The Whizin Institute for Jewish Family Life's objectives include:

- to train synagogue and community leaders in Jewish Family Education techniques
- to use a team approach to better the quality of Jewish Family Education implementation
- to send each synagogue team back home with a core group of influential Jewish Family Education supporters
- to enable Whizin participants to return to their host institutions (including synagogues) with a new way of viewing these institutions

Each summer, leaders of Jewish institutions (including, but not limited to synagogues) are invited to participate in a week-long institute at the University of Judaism (Los Angeles, CA) with the notion that they will come to Whizin and hear some of the best new approaches to Jewish Family Education and return home inspired. Every year, Whizin accepts a maximum of 125 people, giving preference to synagogue teams. An emphasis is placed on attending Whizin's summer institute as a team and returning to the home community with that team in place. The Whizin Institute teaches people the need to think systemically instead of programmatically about Jewish Family Education. Whizin does not promote any one specific vision of Jewish Family Education for participating institutions. However, the Whizin staff aims to have institutional teams return to their host institutions with the understanding that Jewish Family Education is not just an add-on program, but that it is a lever for institutional change.

Whizin has a think tank, headed up by Dr. Ron Wolfson, which convenes each year to discuss and brainstorm the latest Jewish Family Education techniques. Many of these people serve as the faculty for the summer training institutes, including Helene Appelman, Joan Kaye, Vicky Kelman, and Susan Shevitz. Adrienne Bank has studied the effect of Whizin on the teams and their communities. Since 1989, the Whizin Institute has trained hundreds of professionals and lay leaders from synagogues (and other educational institutions, including JCC's) across all the liberal denominations-Conservative, Reform, and Reconstructionist.

**SYNAGOGUE CHANGE IN AMERICA:
A MAP OF SYNAGOGUE CHANGE INITIATIVES**

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December 1998

The research in this report was generously supported by funding from the Mandel Foundation and the Nathan Cummings Foundation. The opinions expressed are those of the author and do not necessarily express the views of the funding agencies.

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OVERVIEW: Map of Synagogue Change Initiatives

Background/ Introduction

Contemporary American Jewish communal leaders often express the concern that the Jewish people are in very real danger of extinction, despite the fact that Jews no longer face the same persecution that their ancestors did. The leadership of the American Jewish community was particularly alarmed by the 52% intermarriage rate that became widely publicized with the publication of the 1990 National Jewish Population Survey. This astronomically high intermarriage rate reflects the reality that Jews are incredibly well accepted and have an easy time assimilating into American Jewish society. While this high rate of intermarriage reflects an extraordinary success story for American Jews, it has given Jewish communal leaders more than a little cause for concern about the future of American Judaism.

Following the publication of the 1990 NJPS, Jewish organizations around the country shifted their focus to a broad-based communal objective that they referred to as "Jewish continuity." Federations, central Jewish education agencies, private foundations, and other Jewish organizations sought to come up with solutions that would ensure that Judaism and the Jewish people would "continue" in America - that Judaism and the Jewish people would not become extinct. Acknowledging the fact that it would be unlikely (and perhaps even undesirable) to reverse intermarriage rates, Jewish communal organizations instead focused their attention on raising the probability of positive Jewish identification and affiliation (Ruskay, 1995).

"Jewish continuity commissions" were established in Federations around the country and Jewish communal organizations developed initiatives that aimed to ensure "Jewish continuity" by designing and implementing strategies for enhancing positive Jewish identification. John

Ruskay, the first director of UJA-Federation of NY's Continuity Commission, wrote and spoke about "institutional transformation" and about "creating compelling communities, inspired and inspiring communities that can sear the soul" (Ruskay, 1996).

Over the past five years, it has been truly remarkable to witness the Jewish communal responses to the "continuity crisis". One manifestation of this communal response has been the "synagogue change" movement. "Synagogue change" is a phrase that was virtually unheard of 10 years ago. Today, it is a phrase that is so commonly used that one cannot help but encounter this term in Jewish policy circles. Throughout the country, many synagogues have embarked on efforts to improve, strengthen, or transform themselves through initiatives that many refer to as "synagogue change projects" or "synagogue change initiatives". Many of these "synagogue change" efforts such as Synagogue 2000 and ECE (the Experiment for Congregational Education) have been spearheaded by umbrella organizations, and other "synagogue change" efforts have been initiated and implemented by individual synagogues. With a grant from the Nathan Cummings Foundation, the Mandel Foundation (the organization formerly known as CIJE, Council for Initiatives in Jewish Education) embarked on a national study of these synagogue change projects in 1998. This document presents a summary of the first phase of this study.

Research Questions

The primary research question that we were seeking to answer in this phase of the study was: What is happening in the arena of "synagogue change?" In other words, what does a "map" of the landscape of "synagogue change" look like? This "mapping" phase was originally intended to serve as a prelude to fieldwork in synagogues, during which we were hoping to address the following additional research questions:

- What are the various definitions and criteria of success for the various synagogue change initiatives?
- What have been the perceived outcomes of synagogue change initiatives in synagogues (in terms of process implementation and impact)?
- What factors are associated with successful synagogue change?

Originally, the purpose of the "mapping" phase was to enable us to develop a typology of synagogue change initiatives and a conceptual framework for the synagogue-level phase of the study. The recommendation to conduct this "mapping" phase before doing fieldwork in synagogues emerged from discussions of the Synagogue Change Research Project Leadership Team, the Synagogue Change Research Advisory Committee, and CIJE staff and consultants. Due to the reorganization of the Mandel Foundation, the synagogue change research project was discontinued in the fall of 1998 and the synagogue-level fieldwork phase of the study was canceled; thus, some of the study's original research questions were not addressed.

In the "mapping" phase of our study, we aimed to identify and describe most of the major synagogue change projects that are currently being implemented across the country, focusing on planned change initiatives whose leaders considered their projects to fit under the broad heading of a "synagogue change project" and whose main objective is institutional change. We attempted to discover as many change initiatives as possible in the time frame by getting referrals from change project leaders and other leaders in regional and national Jewish agencies. The "map" was originally intended to be the first phase of a larger scale study; it was not meant to be comprehensive.

Research Methodology

Our primary sources of data for the "map" were written documents describing the various synagogue change initiatives and interviews with change project leaders at the 'umbrella' level

(i.e. rather than synagogue professionals and lay leaders at the synagogue level, whom we had planned to interview in the next phase of this study). We also sought to understand how leaders of synagogue change projects at the 'umbrella project' level define success for each change initiative, what they perceive to be the outcomes of these initiatives to date, and what factors they believe to be associated with successful synagogue change. While the main objective of the interviews in Phase I of this study was to gather descriptive information about existing synagogue change initiatives, we also asked interview subjects to articulate their "hunches" about factors linked to "successful synagogue change". These "hunches" were originally intended to inform the synagogue-level phase of our research study by enabling us to develop a "site visit guide" to focus our interviews and observations in synagogues.

Summary of Research Findings

When we first began the mapping phase of the Synagogue Change Research Project, we had no idea of how many synagogue change initiatives we would discover. While we knew that the idea of "synagogue change" was popular, we did not anticipate the extent to which the synagogue change phenomenon had swept the country. In our research, we discovered over a dozen initiatives that were "synagogue change projects" even by a stringent definition of the term¹. When we expanded our definition to include projects that did not necessarily consider themselves to be "synagogue change projects" but which did aim to improve, strengthen, or transform synagogue life in some way (and, thus, seemed like "synagogue change projects" to some educated outside observers), we identified the following 20 initiatives:

- Boston's Change Initiatives (*Sh'arim*, *Me'ah*, and Youth Educator Initiative)

¹ Our stringent definition of a "synagogue change project" originally incorporated the following criteria: a) leaders of the change initiative at the 'umbrella' level consider their initiative to be a "synagogue change project" and b) the primary objective of the initiative is "institutional change" (as opposed to leadership development, impact on individuals, or impact on communities).

- Campaign for *Shabbat*
- Carlebach Synagogue: expansion initiative
- Cooperating Schools Network (CSN)
- Designated Schools Program (DSP)
- Experiment in Congregational Education (ECE)
- Friday Night Alive
- Grants Program of the UJA-Federation Continuity Commission of NY
- Initiative in Congregational Education
- Koret Synagogue Initiative (KSI)
- LA Council on Jewish Life: Synagogue Funding Program
- *Mashkon*: Blueprint to Transform Congregational Education
- McKinsey/UJA-Federation of NY Strategic Planning Workshops for Synagogues
- National Jewish Outreach Program initiatives
- Orthodox Caucus: LEAD Rabbinic Fellowship Program
- Partners for Synagogue Change (PSC)
- Synagogue 2000
- Synagogue Initiative Program (SIP)
- Synagogue Leadership Initiative
- Whizin Institute for Jewish Family Life

In the appendix to this summary document, we have included one-page descriptions of these 20 synagogue change initiatives. In addition to these 20 change projects which include more than one synagogue under their 'umbrella', we also identified several individual synagogues that have embarked on their own self-initiated planned change projects without the assistance or sponsorship of an 'umbrella' organization, including Beth Am Israel (Penn Valley, PA), Chizuk Amuno (Baltimore, MD), Ramat Orah (New York, NY), and Temple Shalom (New Milford, CT). The appendix includes summaries of two of these self-initiated projects (Beth Am Israel and Chizuk Amuno).

The rest of this document provides an overview of the 20 umbrella synagogue change initiatives we have studied. Summary statistics included in this overview only pertain to the 15

initiatives for which we have quantitative data about the participating synagogues (synagogue-level data)².

of Synagogues Involved in Synagogue Change Initiatives: The 15 umbrella change projects for which we have synagogue-level data range in scope from 2-50 synagogues each³. On average, each change initiative has 17 synagogues under its 'umbrella'. After accounting for duplicates and triplicates (i.e. 22 synagogues that have participated in two synagogue change initiatives and 3 synagogues that have participated in three change initiatives), there are a total of 259 synagogues that have been involved in these 15 change projects from 1991-1998. Please refer to Map Grid #1 in the appendix for a chart of the number of synagogues in each change project.

Sponsoring Agencies of Synagogue Change Projects: Synagogue change initiatives are sponsored and coordinated by different types of organizations, including national and regional organizations. While the Synagogue 2000 initiative is coordinated by an independent trans-denominational national organization (jointly staffed by academics and project associates at the University of Judaism and Hebrew Union College), other national change initiatives (such as the Cooperating Schools Network, the Experiment in Congregational Education, and the Orthodox Caucus' LEAD Rabbinic Fellowship Program) are sponsored by denominational movements,

² We have synagogue-level data for the following 15 synagogue change projects: Boston's change initiatives, Cooperating Schools Network, Designated School Program, ECE, Friday Night Alive (first cadre), Grants Program of the UJA-Federation Continuity Commission of NY, Koret Synagogue Initiative, LA Council on Jewish Life's Synagogue Grant Program, *Mashkon*, McKinsey/UJA-Federation of NY's Strategic Planning Workshops for Synagogues, Orthodox Caucus LEAD Rabbinic Fellowship Program, Partners for Synagogue Change, Synagogue 2000 (first cadre), Synagogue Initiative Program, and the Synagogue Leadership Initiative.

³ Although we do know that Campaign for *Shabbat* has over 50 synagogues under its umbrella (69, as of December, 1998), we did not include this initiative in our analysis because we could not get a complete list of participating synagogues and synagogue-level data before the publication deadline for this report. Thus, if we had added these synagogues to our total, we would not have been able to de-dupe with accuracy. Furthermore, because we could not get the list of participating synagogues for Campaign for *Shabbat* before the publication deadline, we could not analyze the geographical and size breakdowns for this initiative.

movement-affiliated colleges, or other movement-affiliated organizations. Regional sponsors of synagogue change initiatives include central education agencies, federations, federation continuity commissions, movement-affiliated regional organizations, private foundations (such as the Koret Foundation in San Francisco) and corporations (such as McKinsey Consulting Company in New York). Please refer to Map Grid #2 in the appendix for a depiction of the various sponsoring agencies of all 20 change initiatives. Most of the synagogue change projects are sponsored by regional agencies, rather than by national organizations⁴; all of these regional change initiatives are 'umbrella' projects for synagogues within a defined geographical area. Federations (or federation continuity commissions) and central education agencies are the most common types of regional organizations that sponsor synagogue change initiatives.

Geographical Representation of Synagogues Involved in Synagogue Change Projects:

Communities that currently sponsor regional synagogue change initiatives include Bergen and North Hudson Counties (New Jersey), Boston, Hartford, New York, Philadelphia, San Francisco, and Washington, DC ⁵. If we look at the synagogues that are part of the national change initiatives as well as the regional change initiatives, every area of the country is represented by at least a few synagogues that are involved in umbrella change projects. The strongest representation of synagogues⁶ involved in regional and national synagogue change projects and the strongest representation of regional synagogue change projects⁷ is on the East Coast. Most

⁴ 60% of the 20 synagogue change initiatives are regional and 40% involve synagogues from more than one geographical region.

⁵ In addition to *Mashkon* and the Initiative in Congregational Education, Greater Washington also embarked on a collaborative regional synagogue change initiative with Synagogue 2000 in 1998/1999.

⁶ Of the 259 synagogues involved in the 15 synagogue change projects for which we have synagogue-level data, 67% are located on the East Coast, 25% are on the West Coast, 5% are in the Mid-West, 2% are in the South, and 1% are located outside the U.S. (Refer to Spreadsheet #1 in the Appendix).

⁷ Of the 15 synagogue change projects for which we have synagogue-level data (Spreadsheet #2 in the Appendix), 60% are regional initiatives on the East Coast and 13% are regional initiatives on the West Coast. There are no regional synagogue change initiatives in the Mid-West or South. If we look at all 20 synagogue change projects (Spreadsheet #3 in the Appendix), 50% are regional initiatives on the East Coast and 10% are regional initiatives on the West Coast. There are no regional

synagogue initiatives are regional, rather than involving synagogues from multiple geographical regions⁸. Please refer to Spreadsheet #1 in the appendix for the number of synagogues in each change project distributed by geographical location. Refer to Spreadsheets #2 and #3 in the appendix for the distribution of synagogue change initiatives by geographical location.

Movement Affiliations of Synagogues Involved in Synagogue Change Projects: Synagogue change initiatives involve synagogues from all of the denominations, with strongest representation among Conservative and Reform congregations⁹. All of the movements (through the movement itself or through movement-affiliated organizations) sponsor national or regional synagogue change initiatives¹⁰. However, only the Reform-affiliated Experiment in Congregational Education (ECE) and Partners for Synagogue Change (PSC) are 'synagogue change initiatives' according to our stringent definition of the term (because of their focus on institutional change and their self-perceptions as synagogue change initiatives). Most synagogue change projects are trans-denominational, rather than movement-specific¹¹. Please refer to Map

synagogue change initiatives in the Mid-West or South, unless we consider Detroit's JEFF (Jewish Education For Families) to be a synagogue change initiative and add it to our list of 20.

⁸ 60% of the 20 synagogue change initiatives are regional and 40% involve synagogues from more than one geographical region (Refer to Spreadsheet #3 in the appendix).

⁹ Conservative synagogues represent 35%, Reform synagogues represent 33%, Orthodox synagogues represent 17%, Reconstructionist synagogues represent 11%, and unaffiliated synagogues represent 4% of the synagogues involved in the 15 change projects for which we have synagogue-level data. Refer to Spreadsheet #1 in the appendix.

¹⁰ Refer to Spreadsheets #2 and #3 in the appendix.

¹¹ Of the 15 synagogue change projects for which we have synagogue-level data (Spreadsheet #2 in the Appendix), 73% are trans-denominational initiatives and 27% are movement-specific (13% of the initiatives are Reform, 7% are Orthodox, and 7% are Reconstructionist). If we look at all 20 synagogue change projects (Spreadsheet #3 in the Appendix), 65% are trans-denominational initiatives and 35% are movement-specific (16% of the initiatives are Orthodox, 5% are Conservative, 10% are Reform, and 5% are Reconstructionist).

Among the 20 change projects, there are 3 national change initiatives for Orthodox synagogues (the Carlebach Synagogue's expansion initiative, the National Jewish Outreach Program's initiative to place outreach directors in Orthodox synagogues, and the Orthodox Caucus' LEAD Rabbinic Fellowship Program), one national change initiative for Conservative synagogues (the Rabbinical Assembly and United Synagogue's Campaign for *Shabbat*), one national change initiative for Reform synagogues (HUC-LA's Experiment in Congregational Education), one regional change initiative for Reform synagogues in the New York region (UAHC/GNYCRS's Partners for Synagogue Change), and one national change initiative for Reconstructionist synagogues (JRF's Cooperating Schools Network).

Grid #3 in the appendix for a mapping of the movement affiliations of synagogues involved in each change project.

Topics/Areas of Focus of Synagogue Change Projects: The 20 synagogue change projects cover various different topics or "areas of focus" including education, prayer services, and organizational/systemic issues. Please refer to Map Grid #4 in the appendix to see how the change initiatives map on the dimension of "topics/areas of focus". Looking at the map grid, note that "education" is the most popular area of emphasis for synagogue change initiatives. Some educational initiatives focus specifically on Jewish Family Education, including Boston's *Sh'arim*, the Cooperating Schools Network, and the Whizin Institute. With several change initiatives, the area of focus varies by synagogue; in these initiatives¹², the 'umbrella' project leaders enable the leaders at the synagogue level to focus on an area that best meets the synagogue's objectives and that best fits the synagogue's context¹³.

Points of Entry of Synagogue Change Initiatives: When the synagogue is viewed as an organizational system (see "Dynamic Model of Synagogue Change" in the appendix), one can conceive of a synagogue's ongoing operations and a synagogue's implementation of change processes in terms of the interactions between various components of the organizational system: leadership, strategies, funding, and programming. As illustrated in the diagram, these four constructs interact with each other within the context of the synagogue's organizational culture and vision, and all of these constructs work together to (ideally) have an impact on the

¹² including the Grants Program of the UJA-Federation of NY's Continuity Commission, the Koret Synagogue Initiative, the LA Council on Jewish Life's Synagogue Grant Program, McKinsey/UJA-Federation of NY's Strategic Planning Workshops for Synagogues, the Orthodox Caucus' LEAD Rabbinic Fellowship Program, and Synagogue 2000.

¹³ In addition, for some synagogue change initiatives that have one area of focus, there are different areas of concentration within the area of focus. For example, while CSN, the Initiative in Congregational Education, and *Mashkon* all focus on "education", the participating synagogues each focus on different areas within education. *Mashkon*, for example, offers the following options for

synagogue's membership. Different synagogue change initiatives seem to have different "points of entry" into the synagogue system, with each initiative attempting to enter the synagogue system through one or more of these four organizational constructs or "points of entry": leadership¹⁴, strategies¹⁵, funding¹⁶, and programming¹⁷. We can use these four "points of entry" as another way of mapping the 20 synagogue change initiatives. While many synagogue change initiatives have multiple "points of entry" (Map Grid #5A in the appendix), most of these initiatives have one "point of entry" that is more dominant or primary, as indicated in Map Grid #5B.

Change initiatives that focus on "leadership" as their primary point of entry are ECE, the Orthodox Caucus' LEAD Rabbinic Fellowship Program, Partners for Synagogue Change, Synagogue 2000, and the Synagogue Leadership Initiative. Change initiatives that focus on "strategies" as their primary point of entry are the Designated School Program, McKinsey/UJA-Federation of NY's Strategic Planning Workshops for Synagogues, and the Synagogue Initiative Program. Change initiatives that focus on "funding" as their primary point of entry are Boston's *Sh'arim* (Jewish Family Educator) initiative, the Grants Program of the UJA-Federation of NY's Continuity Commission, the Initiative in Congregational Education, the Koret Synagogue Initiative, the LA Council on Jewish Life's Synagogue Grant Program, *Mashkon*, and the National Jewish Outreach Program's Outreach Directors in Orthodox Synagogues. Change initiatives that focus on "programming" as their primary point of entry are Boston's change

each participating synagogue: 1) To Create A Context of Meaning, 2) *Sh'lom Kitah*, 3) Jewish Teen Institute, 4) Jewish Family Education, and 5) Teachers Center Web Site.

¹⁴ Change initiatives that enter the synagogue system through "leadership" attempt to train a cadre of leaders to change the synagogue's organizational culture.

¹⁵ Change initiatives that enter the synagogue system through "strategies" emphasize strategic planning and planning processes.

¹⁶ Change initiatives that enter the synagogue system through "funding" provide financial resources for planning, programming, staff, etc.

initiatives, Campaign for *Shabbat*, the Carlebach Synagogue's expansion initiative, the Cooperating Schools Network, Friday Night Alive, the National Jewish Outreach Program's *Shabbat Across America*, and the Whizin Institute.

Synagogues Involved in More Than One Synagogue Change Initiative: It is interesting to note that there were 25 synagogues involved in more than one synagogue change initiative in 1991-1998¹⁸. Being involved in more than one change project may reflect a certain change readiness and/or an organizational culture that values innovation and experimentation. While some leaders of the umbrella change initiatives indicated that synagogues involved in multiple change projects were "exemplary" in some way, other change project leaders indicated that some

¹⁷ Change initiatives that enter the synagogue system through "programming" train people to do specific types of programs (such as Jewish Family Education programs) or provide specific types of programs (such as interactive prayer services).

¹⁸ From 1991-1998 (not including synagogues in some new initiatives beginning in 1998/1999, such as the Initiative in Congregational Education and Synagogue 2000's regional initiative in Greater Washington), the following 25 synagogues were involved in more than one initiative:

- Adat Shalom-Rockville, MD (CSN + *Mashkon*)
- Adath Jeshurun-Elkins Park, PA (Designated Schools Program + Friday Night Alive)
- Beth Hillel-Wynnewood, PA (Designated Schools Program + Friday Night Alive)
- Beth Zion-Beth Israel-Philadelphia, PA (Designated Schools Program + Friday Night Alive)
- Congregation Beth Am-Los Altos Hills, CA (ECE + Koret Synagogue Initiative)
- Congregation Beth David-Saratoga, CA (Koret Synagogue Initiative + Synagogue 2000)
- Congregation Beth Simchat Torah (Grants Program of NY + McKinsey)
- Congregation B'nai Jeshurun-New York, NY (McKinsey + Grants Program of NY)
- Congregation Mishkan Torah-Greenbelt, MD (CSN + *Mashkon*)
- Congregation Ner Tamid-Rancho Palos Verdes, CA (LA Council Synagogue Funding Program + Synagogue 2000)
- Congregation Oseh Shalom-Laurel, MD (CSN + *Mashkon*)
- Huntington Jewish Center-Huntington, NY (Grants Program of NY + Synagogue 2000)
- Kehillat Israel-Pacific Palisades, CA (CSN + LA Council Synagogue Funding Program)
- Leo Baeck Temple-Los Angeles, CA (ECE + LA Council Synagogue Funding Program)
- Lincoln Square-New York, NY (Grants Program of NY + McKinsey + Orthodox Caucus)
- Mishkan Shalom-Chestnut Hill, PA (CSN & Designated School Program)
- Reconstructionist Synagogue of the North Shore (CSN + Grants Program of NY)
- Temple Beth Israel-Port Washington, NY (Grants Program of NY + McKinsey)
- Temple Beth Shalom-Roslyn, NY (Grants Program of NY + McKinsey)
- Temple Isaiah-Los Angeles, CA (LA Council Synagogue Funding Program + Synagogue 2000)
- Temple Micah-Washington, DC (*Mashkon* + Synagogue 2000)
- Temple Shalom-Newton, MA (Boston's 3 change initiatives + ECE)
- Town & Village-New York, NY (McKinsey, Grants Program of NY + Synagogue 2000)
- West End Synagogue-New York, NY (CSN + Grants Program of NY + McKinsey)
- Westchester Reform Temple-Scarsdale, NY (ECE + Grants Program of NY)

Note that 22 synagogues were involved in two initiatives and 3 synagogues were involved in three initiatives (Lincoln Square, Town & Village, and West End Synagogue).

synagogue leaders are just "change junkies" and their synagogues are not necessarily more "successful" or "better" than synagogues that are involved in just one change initiative.

Differences Between Synagogue Change Initiatives

As the map grids and spreadsheets in the appendix illustrate, different synagogue change projects focus on different content areas (e.g. education, prayer, organizational dynamics and systemic issues, synagogue ambiance, etc.) and they have different points of entry into the organizational system and the change process (e.g. leadership, strategies, programming, and funding). In other words, different synagogue change initiatives utilize different levers for change and espouse different philosophies about the change process. While most¹⁹ of the initiatives deal with the synagogue as a whole, some of the initiatives focus on the synagogue school as the organizational entity that is the focus of the change process (e.g. Cooperating Schools Network, Designated School Program, the Initiative in Congregational Education, and *Mashkon*).

While many change initiatives utilize consultants, different initiatives use different consulting models. Some projects, such as the Experiment for Congregational Education (ECE) and Partners for Synagogue Change (PSC), utilize a "dedicated consultant" model, assigning one outside consultant or advisor²⁰ to each participating synagogue. During its first year, Synagogue 2000 also utilized a "dedicated consultant" model, assigning one "liaison" to each synagogue; these "liaisons" consulted to the synagogues on a very part-time (and sometimes sporadic) basis while maintaining other full-time professional positions. However, Synagogue 2000 changed its consulting model in its second year by hiring two "change-agent advisors" who work at the

¹⁹ 12 of the synagogue change initiatives deal with the synagogue as a whole, 4 of the initiatives focus on the synagogue school, and 4 of the initiatives deal with both the synagogue and the school. Refer to Map Grid #5A in the appendix.

²⁰ Each ECE advisor spends 20 days per year assisting his/her synagogue's ECE leadership team and task force.

umbrella change project level as full-time professional staff for Synagogue 2000. Most of the change initiatives that do provide consulting support to synagogues only have one consultant for all of the participating synagogues; this one consultant is usually the coordinator and 'umbrella change project leader' as well (e.g. Cooperating Schools Network, Designated School Program, Orthodox Caucus' LEAD Rabbinic Fellowship Program, Synagogue Initiative Program). While some change initiatives facilitate ongoing change-process meetings with each synagogue, other change initiatives provide consulting advice to synagogues on an as-needed per-request basis.

Although many synagogue change projects' leaders use similar terminology and "organizational change process jargon," the terms they use do not always refer to the same things. For example, different change project leaders use the terms "team" and "vision" very differently. While some people use the term "team" to refer to collaborative efforts between different agencies and movement-affiliated organizations in the community (e.g. Boston's change initiatives), other people use the term "team" to refer to collaborative efforts between lay leaders and professionals within each synagogue (e.g. ECE and PSC). While some people use the term "vision" to refer to the synagogue's mission statement (e.g. McKinsey), others use the term "vision" to refer to the umbrella project's guiding philosophy (e.g. Synagogue 2000), and others use the term "vision" to refer to one single lens or "value of spiritual peoplehood" that guides the educational curriculum (e.g. Cooperating Schools Network).

When the synagogue change project leaders²¹ were asked to share their hunches regarding factors linked to success, they expressed very different opinions about the role of the rabbi in the change process; while some interview subjects claimed that the rabbi's active involvement in the change process is unnecessary, others claimed that the rabbi's active support

²¹ from the 14 umbrella synagogue change projects and the 2 individual synagogues involved in self-initiated planned change projects for which we conducted in-depth interviews and for which we have more detailed write-ups

and advocacy of the change initiative is crucial to its success. The interview subjects also expressed very different conceptions about the 'ideal' leadership type that is most conducive to successful synagogue change processes; while some initiatives' coordinators felt that synagogues with dynamic and "charismatic" leaders (rabbis and other professional and lay leaders in the synagogue) were more likely to be successful, other change projects' coordinators felt that synagogues with "democratic" leaders who embodied a philosophy of "shared leadership" were more likely to be successful in their change initiatives.

Commonalities Across Synagogue Change Initiatives

Despite these differences, the various synagogue change projects do have much in common. Most initiatives provide some overall 'umbrella vision' and process guidelines while also providing opportunities for each participating synagogue to individualize and adapt the vision and process to their context. In addition, most change initiatives aim to have an impact on individuals and the local community, as well as on the synagogue as an institution.

Many initiatives involve collaborations between multiple organizations, aside from the synagogue and the sponsoring agency of the change project. For example, the Boston Commission on Jewish Continuity's change initiatives involve collaborations between the Federation, Boston Hebrew College, the Bureau of Jewish Education, the Synagogue Council of Massachusetts, the regional youth movements, and other Jewish communal organizations.

While the details of the change process vary from one project to the next, there were some steps that were incorporated into most of the initiatives' envisioned change processes, such as needs assessment, visioning, and program implementation. In addition, many change initiatives' process guidelines utilize similar terminology and 'buzz words', such as "community conversations", "visioning", "teamwork", and "low-hanging fruit".

Another similarity between change projects is that for many umbrella change project leaders, certain "means" of the change process are also considered "ends" in and of themselves. For example, many initiatives encourage or even require lay/professional teamwork as part of the change process; while lay/professional teamwork or collaboration is often assumed to contribute to the successful implementation of synagogue change initiatives, it is also considered to be a positive end in and of itself. Similarly, many of projects' leaders consider the change process itself to be an indicator of "success"; in other words, being involved in a change process itself is often considered to be an "end" as well as a "means to an end".

One commonality across synagogue change initiatives that was particularly impressive was the extent to which the umbrella project leaders referred to each other's initiatives. Many of the newer change projects' leaders consulted with leaders of projects that have been in existence for awhile to get advice and suggestions about the change process. Even seasoned change project leaders seemed to get input from others about synagogue change. Cross-fertilization of ideas between initiatives seems to be *de rigeur* among professionals involved in synagogue change.

Summary of "Hunches"

The leaders of the synagogue change initiatives who were interviewed in Phase I of this study eagerly shared their "hunches" about factors linked to successful synagogue change. There was more general agreement on the characteristics of the synagogues than on the characteristics of the change process that are most conducive to successful synagogue change. The most frequently cited characteristics of synagogues that were presumed to be linked to success were the following:

- leadership traits and characteristics (including professional staff with outstanding capabilities, a rabbi who is reflective and willing to take risks, and committed lay leaders with expertise in areas that are useful to the change process)
- widespread professional and lay leadership support for the change initiative²²
- an organizational culture and mindset that supports change
- resources (financial and personnel)
- positive lay/professional relations

The most frequently cited characteristics of the change process that were presumed to be linked to success were the following:

- teamwork: opportunities for lay leaders and professional to work together as a team
- consultation: an ongoing consulting structure with highly skilled outside consultants
- vision: a clear purpose and guiding principles for the initiative
- Jewish content: infused with Jewish ideas and subject matter
- adaptability: allowing for adaptation of the initiative to each synagogue's particular context

While the synagogue change initiative leaders did agree on many of their "hunches" and assumptions about factors linked to successful synagogue change, there were some areas of disagreement as well. In particular, the 'umbrella' project leaders disagreed on the following issues:

- What is the 'ideal rabbinical leadership-type' that is most conducive to successful synagogue change initiatives? Is it better to have a rabbi who exhibits a dynamic and charismatic leadership style or one who exhibits a democratic, "shared leadership" style?
- To what extent does the synagogue's vision need to be clearly articulated in order for synagogue change initiatives to be most successful?
- What are the organizational characteristics that are most conducive to successful synagogue change? Is it necessary for synagogues to be 'business-like' or is it preferable for synagogues not to be 'corporate'?
- What is the ideal scope of the change process? Is it preferable for the initiative to focus on the institution as a whole or to focus on one aspect of the synagogue (or school) at a time?
- Is it necessary for 'change managers' to be 'on-site' at synagogues for the initiative to be successful?

²² In my own research about the institutionalization of Jewish Family Education in synagogues, I found that it was more important to have the support of lay people and professionals with high informal status in the synagogue's informal organizational networks than the support of people in positions of formal authority (such as board members or committee chairpeople) (Malik, 1997).

- What is the ideal consulting model that should be used by the change agent:? Is a "dedicated consultant" model preferable to other models?
- How important is it for the change process to incorporate "inspirational" experiences for its participants (in the form of retreats, participatory prayer services, text-study, etc.)?

With all of these areas of disagreement, the overall concerns are: What is most conducive to successful synagogue change? Even if a factor is conducive to success, is it necessary? We had planned to focus on some of these areas of disagreement in the synagogue-level phase of this study. Perhaps other researchers will pick up where we left off and address some of these very critical issues.

Suggestions for Future Research

The original intention of this study was to conduct fieldwork following the "mapping" phase. We clearly advocate a synagogue-level follow-up to this study. The following is a suggested research design for such a follow-up study, based on several teleconferences, a meeting of the Synagogue Change Research Leadership Team, and input from the Research Advisory Committee.

Defining synagogues as the unit of analysis, we propose a multiple case-study design (Yin, 1989), incorporating qualitative methods such as interviews and focus groups. Such a study would aim to describe the various definitions of success used within synagogues, the ways in which actual implementation of the change process in synagogues matches up to the envisioned process, and the ways in which the change project has had an impact on individual synagogues and congregants. Ultimately, researchers should attempt to identify those characteristics of synagogues and of change processes that are linked to successful synagogue change, based on the change projects' and synagogues' own definitions of "success". We suggest focusing on a few factors that are potentially linked to success, such as those areas of

disagreement that were identified in interviews with the umbrella-project leaders in the "mapping" phase of the study (see previous section on "hunches"). While the "mapping" phase of the study provided breadth to our understanding of synagogue change initiatives, a synagogue-level phase would attempt to contribute depth to our understanding. By focusing on fewer synagogues in more depth, we would be able to provide a rich accounting of the specifics of the change process.

After much discussion, we decided that site-selection should not be guided by the strategies of "ideal-bellwether-case selection" or "extreme-case selection" (Goetz & LeCompte, 1984; Merriam, 1998). Some of the reasons for rejecting the idea of selecting all "successful" synagogues include:

- you need "unsuccessful" as well as "successful" synagogues in order to understand which factors are linked to success;
- there may not be any cases of "success" yet (since some synagogues may be at too early a stage in the change process).

One of the reasons for rejecting the idea of even using "success" as a primary site-selection criterion is the potential bias involved in asking umbrella change project leaders to identify "successful" and "unsuccessful" synagogues (due to the blurring of lines between definitions of success and factors linked to success). Another reason for rejecting the idea is the political issue involved in asking umbrella change project leaders to identify "unsuccessful" synagogues. In addition, there is a conceptual difficulty in using "success" as a site-selection criterion since "success" is a contested term; there are multiple notions and definitions of success even within one synagogue.

Rather than using "success" as a site-selection criterion, we recommend using one of the typologies of synagogue change initiatives from the "mapping" phase as the primary basis for site-selection. In selecting synagogues for case studies, researchers could start at the level of the

synagogue change project. In particular, we recommend using the "points-of-entry of synagogue change projects" typology outlined in Map Grids #5A and #5B (in the appendix):

- 1) Leadership: training a cadre of leaders to change the synagogue's organizational culture
- 2) Strategies: emphasis on strategic planning and planning process
- 3) Funding: providing financial resources for planning, programming, staff, etc.
- 4) Programming: training people to do specific types of programs (such as Jewish Family Education programs) or providing specific types of programs (such as interactive prayer services)

Within each of these categories, researchers should select at least one synagogue change initiative. For example, one could select Synagogue 2000 and/or ECE as initiatives whose primary focus is "leadership," the McKinsey Project as an initiative whose primary focus is "strategies," the Koret Synagogue Initiative as an initiative whose primary focus is "funding," and the Cooperating Schools Network as an initiative whose primary focus is "programming." Within each of these change initiatives, we recommend selecting at least 2 synagogues. In the overall 'batch' of 8-10 synagogues selected, we should attempt to select synagogues of different sizes, movement affiliations, and geographical regions to ensure diversity on some key characteristics. These selections could be made from the pool of "*vatikim*" synagogues that have been participating in each of the selected synagogue change initiatives for at least a few years, using an algorithm like the "greedy search algorithm" (Wyner, 1998). Before finalizing the list of selected sites, researchers should get a sense from the umbrella change project leaders about their perceptions of the levels of "success" of the synagogues that were selected using the greedy search algorithm (on the variables "size," "movement" and "geographical region"); this is just to ensure that the researchers have not mistakenly selected all "successful" or all "unsuccessful" synagogues (at least according to the definitions of the umbrella change project leaders). It is hoped that the cases selected will be of varying levels of "success." Because this is a multiple case-study design, the logic is one of "replication logic" rather than "statistical sampling logic."

The cases should produce contrary results for theoretical reasons, in line with the logic of "theoretical replication" (Yin, 1989).

In the field, the primary sources of data should be observations and interviews at each of the selected synagogues. Key informants include the rabbi, educator/principal, cantor, executive director and other synagogue staff, board members and other lay leaders, any outside liaisons or consultants involved in the change process, lay leaders involved in the change process, and other congregants. For the interviews, rather than using a "survey in interview format," researchers should use a "site-visit guide." This guide would feature a checklist that focuses on a few key factors (such as those derived from the "mapping" phase of the study), but the interviewers should go into the field with an open mind. Observations should include informal "cruises" (Dwyer, Lee, Barnett, Filby, & Rowan, 1985) of the synagogue and synagogue school, as well as observations of board meetings and meetings that are specifically related to the change process. We recommend analyzing the data using an iterative process of data reduction, data display, and conclusion drawing and verification. It should be an embedded analysis, in which each case is analyzed for its particular dynamics and then followed up by a cross-case analysis using qualitative analysis tools such as matrices (Miles & Huberman, 1994).

For More Information

There are more detailed 'map summary write-ups' of the following 14 umbrella synagogue change projects: Boston's Change Initiatives (*Sh'arim*, *Me'ah*, and Youth Educator Initiative), the Cooperating Schools Network (CSN), the Designated Schools Program (DSP), the Experiment in Congregational Education (ECE), Friday Night Alive, the Grants Program of the UJA-Federation Continuity Commission of NY, the Koret Synagogue Initiative (KSI), McKinsey/UJA-Federation of NY Strategic Planning Workshops for Synagogues, Orthodox

Caucus: LEAD Rabbinic Fellowship Program, Partners for Synagogue Change (PSC), Synagogue 2000, Synagogue Initiative Program (SIP), Synagogue Leadership Initiative, and the Whizin Institute. There are also detailed 'map summary More detailed descriptions of most of the synagogue change initiatives listed in this report are available. Included in the longer version are the names and phone numbers of key contact people for each synagogue change initiative. Please contact Lisa Malik (lisamalik@compuserve.com) for more information.

A P P E N D I X

MAP GRID #1

NUMBER OF SYNAGOGUES IN EACH CHANGE PROJECT

NAME OF CHANGE PROJECT	NUMBER OF SYNAGOGUES
Boston Change Initiatives: <i>Sh'arim</i> , <i>Me'ah</i> , and YEI	28 (=13 <i>Sh'arim</i> + 22 <i>Me'ah</i> + 12 YEI – duplicates)
Campaign for <i>Shabbat</i>	incomplete data
Carlebach Synagogue: expansion initiative	incomplete data
Cooperating Schools Network (CSN)	21
Designated Schools Program (DSP)	7
Experiment in Congregational Education (ECE)	14
Friday Night Alive	6 in first cadre (+ 12 planned for 98/99)
Grants Program – NY UJA Fed	22 (+ 3 denominational synagogue project grants + 1 collaborative inter-synagogue grant)
Initiative in Congregational Education (Greater Washington)	initiative just beginning in 1998/1999
Koret Synagogue Initiative (KSI)	8
LA Council on Jewish Life Synagogue Grant Program	50 synagogue grant recipients 1991-1997 (not including grants for collaborative initiatives)
<i>Mashkon</i> : Blueprint to Transform Congregational Education (Greater Washington)	25
McKinsey/UJA Fed. (NY)	25
National Jewish Outreach Program: Outreach Directors in Orthodox Synagogues	incomplete data
Orthodox Caucus LEAD Rabbinic Fellowship Program	15
Partners for Synagogue Change (PSC)	4
Synagogue 2000	16 in first cadre (+ 6 planned in Washington, DC for 98/99)
Synagogue Initiative Program (SIP)	2
Synagogue Leadership Initiative (SLI)	44 at kick-off event
Whizin Institute for Jewish Family Life	incomplete data
Total # (for 15 projects for which we have synagogue data)	259 (= 287-duplicates & triplicates)

MAP GRID #2

SPONSORING AGENCIES OF SYNAGOGUE CHANGE PROJECTS

NATIONAL ORGANIZATION		REGIONAL ORGANIZATION					INDIVIDUAL SYNAGOGUE
Independent	Movement, Movement-Affiliated College or other Org.	Central Education Agency	Federation or Continuity Commission	Foundation	Movement, Movement-Affiliated Organization	Other	
<input type="checkbox"/> Synagogue 2000 <input type="checkbox"/> Whizin	<input type="checkbox"/> Campaign for <i>Shabbat</i> (Conserv.) <input type="checkbox"/> Carlebach Synagogue expansion initiative <input type="checkbox"/> CSN (Recon.) <input type="checkbox"/> ECE (Reform) <input type="checkbox"/> National Jewish Outreach Program <input type="checkbox"/> Orthodox Caucus LEAD Rabbinic Fellowship Program	<input type="checkbox"/> DSP (Philadelphia) <input type="checkbox"/> <i>Mashkon</i> (Washington) <input type="checkbox"/> Synagogue Initiative Program (SIP) (Hartford, CT)	<input type="checkbox"/> Friday Night Alive (Philadelphia) <input type="checkbox"/> Grants Program-UJA-Federation (NY) <input type="checkbox"/> Initiative in Congregational Education (Washington) <input type="checkbox"/> LA Council on Jewish Life Synagogue Grant Program <input type="checkbox"/> McKinsey/UJA (NY) <input type="checkbox"/> <i>Me'ah, Sh'arim</i> and YEI (Boston) <input type="checkbox"/> Synagogue Leadership Initiative (SLI) (NJ)	<input type="checkbox"/> Koret (KSI) (SF Bay Area)	<input type="checkbox"/> Partners for Synagogue Change - (PSC) [NY]	<input type="checkbox"/> McKinsey/UJA (NY)	<input type="checkbox"/> (Beth Am Israel) <input type="checkbox"/> (Chizuk Amuno) <input type="checkbox"/> Others.....

MAP GRID #3

MOVEMENT AFFILIATION OF SYNAGOGUES INVOLVED IN EACH CHANGE PROJECT

	ORTHODOX	CONSERVATIVE	REFORM	RECONSTRUCTIONIST	TRANSDENOMINATIONAL
Boston Change Initiatives		X	X		X
Campaign for <i>Shabbat</i>		X			
Carlebach Synagogue: expansion initiative	X				
Cooperating Schools Network (CSN)				X	
Designated Schools Program (DSP)		X	X	X	X
Experiment in Congregational Education (ECE)			X		
Friday Night Alive		X	X	X	X
Grants Program – NY UJA Fed.	X	X	X	X	X
Initiative in Congregational Education (Greater Washington)		X	X	X	X
LA Council on Jewish Life Synagogue Grant Program	X	X	X	X	X
<i>Mashkon</i> : Blueprint to Transform Congregational Education (Greater Washington)		X	X	X	X
McKinsey/UJA Fed. (NY)	X	X	X	X	X
National Jewish Outreach Program: Outreach Directors in Orthodox Synagogues	X				
Orthodox Caucus LEAD Rabbinic Fellowship Program	X				
Partners for Synagogue Change (PSC)			X		
Synagogue 2000		X	X		X
Synagogue Initiative Program (SIP)		X	X		X
Synagogue Leadership Initiative (SLI)	X	X	X	X	X
Whizin		X	X	X	X

MAP GRID #4

"TOPICS/AREAS OF FOCUS" OF SYNAGOGUE CHANGE PROJECTS

	Education	Prayer Services	Healing	Ambiance	Social Action	Organizational Dynamics & Systemic Issues	Other	Focus varies by synagogue
Boston Change Initiatives	X							
Campaign for <i>Shabbat</i>	X						X	
Carlebach Synagogue expansion initiative		X						
Cooperating Schools Network (CSN)	X							X
Designated Schools Program (DSP)	X					X		
Experiment in Congregational Education (ECE)	X							
Friday Night Alive		X						
Grants Program – NY UJA Fed								X
Initiative in Congregational Education (Greater Washington)	X							X
Koret Synagogue Initiative (KSI)								X
LA Council on Jewish Life Synagogue Grant Program								X
<i>Mashkon</i> : Blueprint to Transform Congregational Education (Greater Washington)	X							X
McKinsey/UJA Fed. (NY)								X
National Jewish Outreach Program: Outreach Directors in Orthodox Synagogues							X	
Orthodox Caucus LEAD Rabbinic Fellowship Program								X
Partners for Synagogue Change (PSC)						X		
Synagogue 2000	Not Yet	X	X	X	Not Yet			X
Synagogue Initiative Program (SIP)	X					X		
Synagogue Leadership Initiative (SLI)						X		
Whizin	X							

MAP GRID #5A

"POINTS OF ENTRY" FOR SYNAGOGUE CHANGE PROJECTS

	Leadership: training a cadre of leaders to change the org. culture		Strategies: Planning Process		Funding: providing financial resources for planning, programming, staff, etc.		Programming: training people to do specific types of programs or providing specific types of programs	
	Synagogue	School	Synagogue	School	Synagogue	School	Synagogue	School
Boston Change Initiatives: <i>Sh'arim</i> , <i>Me'ah</i> , YEI	X	X			X <i>Sh'arim</i>	X <i>Sh'arim</i>	X	X
Campaign for <i>Shabbat</i>							X	
Carlebach Synagogue: expansion initiative							X	
Cooperating Schools Network (CSN)								X
Designated School Program (DSP)				X				
Experiment in Congregational Education (ECE)	X	X	X	X				
Friday Night Alive							X	
Grants Prog. – NY UJA Federation					X			
Initiative in Congregational Education (Greater Washington)						X		
Koret Synagogue Initiative (KSI)					X		X	
LA Council on Jewish Life Synagogue Grant Program					X			
<i>Mashkon</i> : Blueprint to Transform Congregational Education (Greater Washington)		X				X		
McKinsey/UJA Fed. (NY)			X					
National Jewish Outreach Program: Outreach Directors in Orthodox Synagogues and <i>Shabbat</i> Across America					X		X	
Orthodox Caucus LEAD Rabbinic Fellowship Program	X							
Partners for Synagogue Change (PSC)	X							
Synagogue 2000	X						X	
Syn. Initiative Program (SIP)			X	X				
Syn. Leadership Initiative (SLI)	X							
Whizin	X	X					X	X

PRIMARY "POINTS OF ENTRY" FOR SYNAGOGUE CHANGE PROJECTS

	Leadership: training a cadre of leaders to change the org. culture	Strategies: Planning Process	Funding: providing financial resources for planning, programming, staff, etc.	Programming: training people to do specific types of programs or providing specific types of programs
PRIMARY "POINT OF ENTRY"	<input type="checkbox"/> ECE <input type="checkbox"/> Orthodox Caucus LEAD <input type="checkbox"/> PSC <input type="checkbox"/> Synagogue 2000 <input type="checkbox"/> Synagogue Leadership Initiative (SLI)	<input type="checkbox"/> Designated School Program (DSP) <input type="checkbox"/> McKinsey/UJA <input type="checkbox"/> SIP	<input type="checkbox"/> Boston: <i>Sh'arim</i> <input type="checkbox"/> Grants Program of NY UJA-Federation <input type="checkbox"/> Initiative in Congregational Education (Washington) <input type="checkbox"/> Koret Synagogue Initiative (KSI) <input type="checkbox"/> LA Council on Jewish Life Synagogue Grant Program <input type="checkbox"/> <i>Mashkon</i> (Washington) <input type="checkbox"/> National Jewish Outreach Program: Outreach Directors in Orthodox Synagogues	<input type="checkbox"/> Boston Change Initiatives: <i>Sh'arim</i> , <i>Me'ah</i> , & YEI <input type="checkbox"/> Campaign for <i>Shabbat</i> <input type="checkbox"/> Carlebach Synagogue: expansion initiative <input type="checkbox"/> Cooperating Schools Network (CSN) <input type="checkbox"/> Friday Night Alive <input type="checkbox"/> National Jewish Outreach Program: <i>Shabbat</i> Across America <input type="checkbox"/> Whizin
SECONDARY "POINT OF ENTRY"	<input type="checkbox"/> Boston Change Initiatives: <i>Sh'arim</i> , <i>Me'ah</i> , & YEI <input type="checkbox"/> <i>Mashkon</i> (Washington) <input type="checkbox"/> Whizin	<input type="checkbox"/> ECE		<input type="checkbox"/> Koret Synagogue Initiative (KSI) <input type="checkbox"/> Synagogue 2000

Chart 1: Number of Synagogues in Each Change Project, Distributed by Geographical Location, Movement, & Size (for 15 change initiatives for which we have synagogue-level data)

	GEOGRAPHICAL LOCATION						MOVEMENT								SIZE				
SYNAGOGUE CHANGE PROJECT	East	West	Mid-West	South	International		Orthodox	Conservative	Reform	Reconstructionist	Unaffiliated	No Data		Small	Medium	Large	No Data		
						TOTALS							TOTAL	under 500	500-800	800+		TOTALS	
Boston's change initiatives	28	0	0	0	0	28	0	11	12	0	2	3	28	4	5	4	15	28	
Cooperating Schools Network	9	4	5	2	1	21	0	0	0	21	0	0	21	19	2	0	0	21	
Designated Schools Program	7	0	0	0	0	7	0	4	2	1	0	0	7	4	2	1	0	7	
ECE	4	4	4	2	0	14	0	0	14	0	0	0	14	2	5	7	0	14	
Friday Night Alive-first cadre	6	0	0	0	0	6	0	5	0	1	0	0	6	4	1	1	0	6	
Grants Program-NY Fed	22	0	0	0	0	22	5	8	3	3	3	0	22	0	0	0	22	22	
Koret Synagogue Initiative	0	8	0	0	0	8	0	3	5	0	0	0	8	0	6	2	0	8	
LA Council Jewish Life-Syn. Grants	0	50	0	0	0	50	11	15	18	3	3	0	50	0	0	0	50	50	
Mashkon	25	0	0	0	0	25	0	12	8	3	2	0	25	0	0	0	25	25	
McKinsey/UJA	25	0	0	0	0	25	5	11	4	3	2	0	25	12	7	5	1	25	
Orthodox Caucus	10	1	2	0	2	15	15	0	0	0	0	0	15	0	0	0	15	15	
Partners for Synagogue Change	4	0	0	0	0	4	0	0	4	0	0	0	4	0	2	2	0	4	
Synagogue 2000-first cadre	9	4	3	0	0	16	0	8	8	0	0	0	16	6	7	3	0	16	
Synagogue Initiative Program	2	0	0	0	0	2	0	1	1	0	0	0	2	1	1	0	0	2	
Synagogue Leadership Initiative	44	0	0	0	0	44	9	21	9	1	1	3	44	26	8	0	10	44	
Total # synagogues (before de-duping)	195	71	14	4	3	287	45	99	88	36	13	6	287	78	46	25	138	287	
subtract duplicates & triplicates	22	6	0	0	0	28	2	10	6	8	2	0	28	4	2	3	19	28	
Total # synagogues (after de-duping)	173	65	14	4	3	259	43	89	82	28	11	6	259	74	44	22	119	259	
Total % (after de-duping)	66.80%	25.10%	5.41%	1.54%	1.16%		17.00%	35.18%	32.41%	11.07%	4.35%			52.86%	31.43%	15.71%			

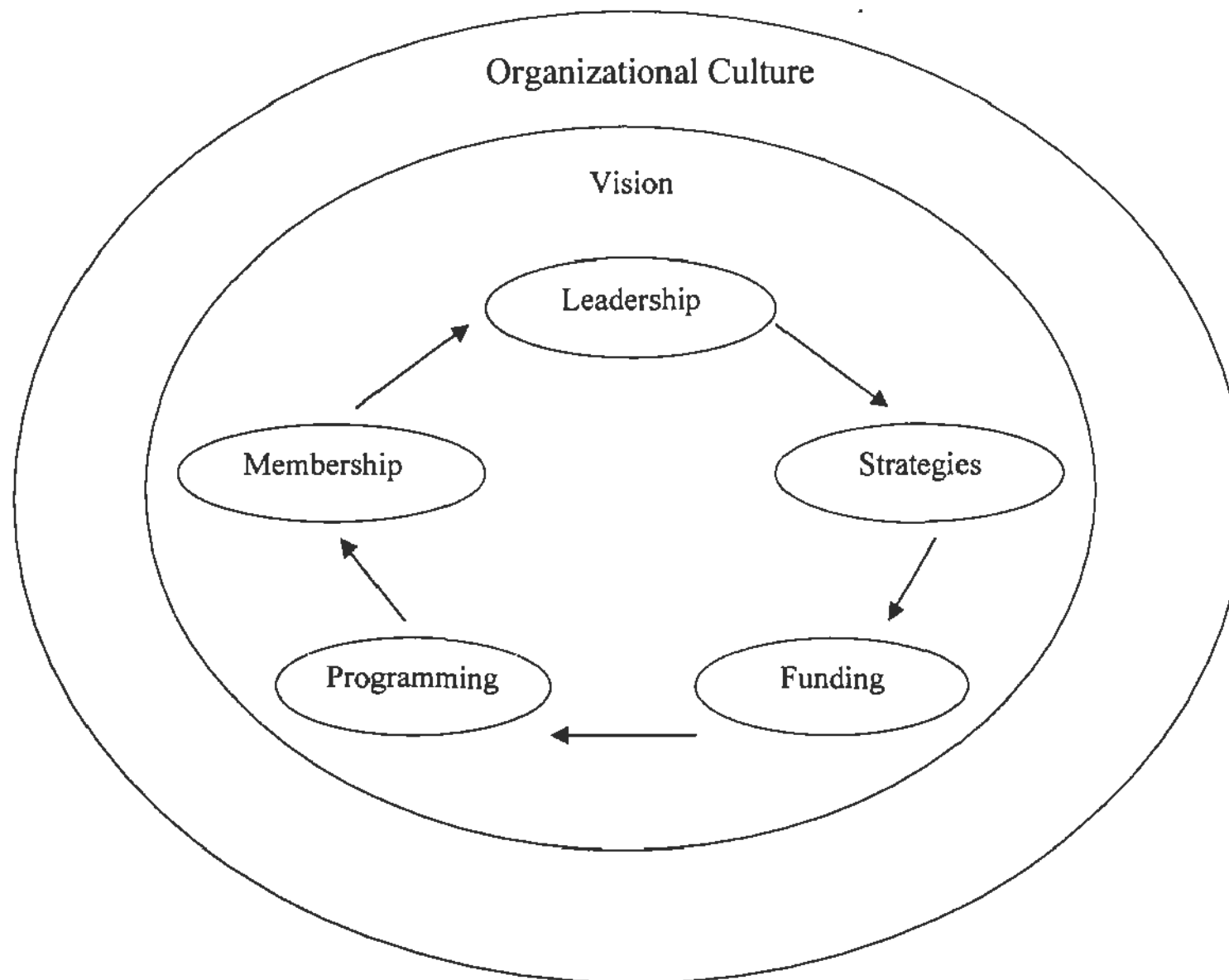
Chart 2: % of Synagogues in Each Change Project: Distributions by Geographical Location & Movement (for 15 change initiatives for which we have synagogue-level data)												
	GEOGRAPHICAL LOCATION						MOVEMENT					
SYNAGOGUE CHANGE PROJECT	East	West	Mid-West	South	International	Trans-regional	Orthodox	Conservative	Reform	Reconstructionist	Unaffiliated	Trans-Denominational
Boston's change initiatives	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	44.00%	48.00%	0.00%	8.00%	100.00%
Cooperating Schools Network	42.86%	19.05%	23.81%	9.52%	4.76%	100.00%	0.00%	0.00%	0.00%	100.00%	0.00%	0.00%
Designated Schools Program	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	57.14%	28.57%	14.29%	0.00%	100.00%
ECE	28.57%	28.57%	28.57%	14.29%	0.00%	100.00%	0.00%	0.00%	100.00%	0.00%	0.00%	0.00%
Friday Night Alive-first cadre	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	83.33%	0.00%	16.67%	0.00%	100.00%
Grants Program-NY Fed	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	22.73%	36.36%	13.64%	13.64%	13.64%	100.00%
Koret Synagogue Initiative	0.00%	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	37.50%	62.50%	0.00%	0.00%	100.00%
LA Council Jewish Life-Syn. Grants	0.00%	100.00%	0.00%	0.00%	0.00%	0.00%	22.00%	30.00%	36.00%	6.00%	6.00%	100.00%
Mashkon	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	48.00%	32.00%	12.00%	8.00%	100.00%
McKinsey/UJA	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	20.00%	44.00%	16.00%	12.00%	8.00%	100.00%
Orthodox Caucus	66.67%	6.67%	13.33%	0.00%	13.33%	100.00%	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Partners for Synagogue Change	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	100.00%	0.00%	0.00%	0.00%
Synagogue 2000-first cadre	56.25%	25.00%	18.75%	0.00%	0.00%	100.00%	0.00%	50.00%	50.00%	0.00%	0.00%	100.00%
Synagogue Initiative Program	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	50.00%	50.00%	0.00%	0.00%	100.00%
Synagogue Leadership Initiative	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	21.95%	51.22%	21.95%	2.44%	2.44%	100.00%
% of change projects with synagogues all in one category	60.00%	13.33%	0.00%	0.00%	0.00%	26.67%	6.67%	0.00%	13.33%	6.67%	0.00%	73.33%

Chart 3: Distribution of Synagogue Change Initiatives by Geographical Location and Movement (for all 20 initiatives)

SYNAGOGUE CHANGE PROJECT	GEOGRAPHICAL LOCATION						MOVEMENT					
	East	West	Mid-West	South	International	Trans-regional	Orthodox	Conservative	Reform	Reconstructionist	Unaffiliated	Trans-Denominational
Boston's change initiatives	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	44.00%	48.00%	0.00%	8.00%	100.00%
Campaign for <i>Shabbat</i>	no data	no data	no data	no data	no data	100.00%	0.00%	100.00%	0.00%	0.00%	0.00%	0.00%
Carlebach Synagogue: expansion	no data	no data	no data	no data	no data	100.00%	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Cooperating Schools Network	42.86%	19.05%	23.81%	9.52%	4.76%	100.00%	0.00%	0.00%	0.00%	100.00%	0.00%	0.00%
Designated Schools Program	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	57.14%	28.57%	14.29%	0.00%	100.00%
ECE	28.57%	28.57%	28.57%	14.29%	0.00%	100.00%	0.00%	0.00%	100.00%	0.00%	0.00%	0.00%
Friday Night Alive-first cadre	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	83.33%	0.00%	16.67%	0.00%	100.00%
Grants Program-NY Fed	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	22.73%	36.36%	13.64%	13.64%	13.64%	100.00%
Initiative in Congregational Education	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	no data	no data	no data	no data	no data	100.00%
Koret Synagogue Initiative	0.00%	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	37.50%	62.50%	0.00%	0.00%	100.00%
LA Council Jewish Life Syn. Grants	0.00%	100.00%	0.00%	0.00%	0.00%	0.00%	22.00%	30.00%	36.00%	6.00%	6.00%	100.00%
<i>Mashkon</i>	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	48.00%	32.00%	12.00%	8.00%	100.00%
McKinsey/UJA	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	20.00%	44.00%	16.00%	12.00%	8.00%	100.00%
National Outreach Program	no data	no data	no data	no data	no data	100.00%	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Orthodox Caucus	100.00%	6.67%	13.33%	0.00%	13.33%	100.00%	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Partners for Synagogue Change	56.25%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	100.00%	0.00%	0.00%	0.00%
Synagogue 2000-first cadre	100.00%	25.00%	18.75%	0.00%	0.00%	100.00%	0.00%	50.00%	50.00%	0.00%	0.00%	100.00%
Synagogue Initiative Program	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	50.00%	50.00%	0.00%	0.00%	100.00%
Synagogue Leadership Initiative	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	21.95%	51.22%	21.95%	2.44%	2.44%	100.00%
WhizIn Institute	no data	no data	no data	no data	no data	100.00%	no data	no data	no data	no data	no data	100.00%
% of change projects with synagogues all in one category	50.00%	10.00%	0.00%	0.00%	0.00%	40.00%	15.00%	5.00%	10.00%	5.00%	0.00%	65.00%

DYNAMIC MODEL OF SYNAGOGUE CHANGE

Based on Synagogue Change Leadership Team Meeting 8/4/98 (revised 10/98)



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

Sponsoring Agency: individual synagogue: Beth Am Israel-Penn Valley, PA (Conservative)

Funding Sources: Grant from the Jewish Federation of Greater Philadelphia's Continuity Commission

Summary of Change Initiative:

In the summer of 1993, Rabbi Marc Margolius challenged Cyd Weissman (the educational director) to either create a "better" failed model of supplementary education or to create a new model altogether. The model that Cyd and Rabbi Margolius developed was partially inspired by the book, *A Congregation of Learners* (Aron, Lee, and Rossel) and by Jonathan Woocher's article on Jewish identity which expressed the idea that identity is formed by being within a community of practice and value. The Design Project's vision is of a "community of engagement". Originally, the vision was of a "community of learners" (a term borrowed from ECE, the Experiment in Congregational Education); the language of the change project was changed because some congregants felt belittled by the term, in light of the synagogue's history of commitment to *Torah*, *Avodah* and *Gemilut Chassadim*. The vision is that all members will be engaged by the synagogue's challenge to take seriously their Jewish involvement and communal responsibilities. The synagogue expects and enjoys a remarkably high level of congregant involvement in all aspects of synagogue life, from delivering meals to the homeless to delivering *divrei Torah*. In striving to become a "community of engagement", Beth Am Israel blends respect for tradition with openness to innovative forms of Jewish expression. It provides an alternative model for supplementary school education that actively aims to get families engaged in Jewish living and learning.

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

After articulating their vision and expectations, the synagogue professionals in partnership with the education committee implemented a host of new educational programs in 1994. The core educational program occurs on *Shabbat* and is, in fact, interwoven with the *Shabbat* morning service. Children in first grade and up have the option to participate in the *Beit Midrash* in lieu of *Bet Sefer*. *Beit Midrash* was not intended to be a traditional Hebrew School model. It is the synagogue professionals' expectation that the *Beit Midrash* is a place where adults go on journeys with their children. Furthermore, the Design Project envisions the synagogue as a community. *Beit Midrash* students come to the synagogue for classes on Thursday afternoons; they also come with their families on *Shabbat* morning and break away into their own classes during the *Shabbat* service. Additional *Beit Midrash* programming includes *Shabbat* lunches, continued study in the *Shabbat* Academy (9-10 a.m.), services (11 a.m.-12:30 p.m.), minyanim with children (11 a.m.-12 p.m.), story reading and help in the classroom (10 a.m.-11 a.m.). Students are expected to continue this study through the 12th grade. The rabbi and education director deliberately changed the language of the BAI community because of their belief that language impacts people's attitudes. Since "Hebrew School" conjures up a negative image for most people, *Shabbat* educational programming is called *Beit Midrash* and Sunday educational programming is called *Beit Sefer*.

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

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

Funding Sources: *Sh'arim*: COJC; *Me'ah*: grants from CJP Donor-Advised Funds and the Righteous Persons Foundation; *YEI*: COJC grants made available through Combined Jewish Philanthropies Endowment funds.

Summary of Change Initiative: Boston's Commission on Jewish Continuity, which was formed in 1989, sponsors and coordinates three educational initiatives: *Sh'arim*, *Me'ah*, and the Youth Educator Initiative (YEI). Together, all 3 initiatives aim to ensure a strong future for the Boston Jewish community by fostering positive change in Jewish institutions and individuals through the route of Jewish education. There are 28 Conservative and Reform synagogues participating in one or more of these initiatives. While *Sh'arim* and *Me'ah*'s participating sites include other Jewish organizations in addition to synagogues, YEI's sites are all synagogues.

- Sh'arim* provides funding to 13 synagogues (and 3 other institutions) to enable them to hire part-time or full-time professional Jewish family educators. For the first three years of each institution's grant, *Sh'arim* funds 50% of the family educator's salary; in the fourth year and beyond, *Sh'arim* matches 25-40% of the institution's contributions to the family educator's salary. In addition to funding salaries, *Sh'arim* also provides two years of training at Boston Hebrew College for each family educator and facilitates ongoing networking opportunities for Boston's family educators via the BJE's Family Educator Network. Through its funding and leadership development strategies, *Sh'arim* aims to transform institutions (primarily synagogues) by enabling them to hire professionally trained family educators; it also aims to transform Jewish families and to build the profession of Jewish family education. Implementation of *Sh'arim* began in 1993.

- Me'ah*, a cooperative venture between Boston Hebrew College and the COJC, is an intensive high-quality program of Jewish study which provides 100 hours of learning over the course of two years to each participating adult. *Me'ah* furnishes adults with a framework for ongoing study of Jewish texts, philosophy, and history, based on the belief that Jewish learning can have an impact on individuals, institutions (including synagogues) and the community. There are currently 17 *Me'ah* sites, representing 28 institutions (including 22 synagogues). *Me'ah* aims to change the culture of the Boston Jewish community by increasing the status of Jewish education and the personal meaning of Jewish learning for leaders in Jewish institutions (including synagogues) throughout the Boston area. Its objectives include increasing Jewish literacy of Jewish adults, building a community of active Jewish learners in the Boston area, and transforming Jewish institutions (including synagogues) by involving *Me'ah* participants and graduates as role models and leaders among their membership. Implementation of *Me'ah* began in 1994.

- The Youth Educator Initiative (YEI) consists of professional development for youth educators, consultation to youth educators, community team events for people who work with teenagers, and funding to synagogues for the improvement of youth programming, organizational development in the area of youth education, and professional development for youth educators. With guidance from the BJE and the Synagogue Council of Massachusetts, teams of lay and professional leaders at each of the 12 YEI synagogues work together to develop and implement a comprehensive vision of the ideal youth community for that synagogue that integrates formal studies, youth group activities, Jewish camping, and the Israel experience. YEI's objectives include enhancing the profession of youth educator and the field of Jewish youth work, upgrading the Judaic content of programs for teens and pre-teens, enhancing the Boston Jewish community's impact on its youth, transforming synagogues into places where there is integration between formal and informal educational opportunities for teens and pre-teens, and developing and strengthening the institutional structures that design, oversee and implement Jewish youth programs. YEI was initially piloted in 1994; it became a fully developed initiative in 1996.

Title of Synagogue Change Project: Campaign for *Shabbat*

Sponsoring Agency: Committee for Commitment and Observance (Rabbinical Assembly and United Synagogue of Conservative Judaism)

Funding Sources: Rabbinical Assembly and United Synagogue

Summary of Change Initiative:

Campaign for *Shabbat* was initiated by the Committee for Commitment and Observance, a collaborative effort of the Rabbinical Assembly and the United Synagogue of Conservative Judaism. The overall objective of Campaign for *Shabbat* is to challenge synagogue congregants to explore *Shabbat* and to give them the tools to learn about *Shabbat* and its observance. Some of the slogans that have been used for Campaign for *Shabbat* include "*Shabbat: Experience the Joy*" and "*Shabbat: A Rest for the Day of Your Life*". It is an inreach program for synagogue members that is premised on the assumption that congregants are not "stupid"; they are just "ignorant" about some of the aspects of *Shabbat* observance and are embarrassed to say "Teach Me". Campaign for *Shabbat* requires participating synagogues to offer educational activities such as tutoring and training and to provide support groups for congregants who are learning how to be more observant. In addition, Campaign for *Shabbat* provides opportunities for synagogue members to network with each other via e-mail. There are currently 69 Conservative synagogues throughout the United States and Canada participating in Campaign for *Shabbat*. Joseph Mendelsohn, a rabbinical student at the Jewish Theological Seminary and the spiritual leader of Beth El Synagogue (Waterbury, CT), is the coordinator of the program.

Title of Synagogue Change Project: Carlebach Synagogue: expansion initiative

Sponsoring Agency: Carlebach Synagogue-New York, NY

Funding Sources: some funding from Covenant Foundation; applying for grant from Cummings Foundation

Summary of Change Initiative:

The objective of the Carlebach Synagogue's expansion initiative is to enable other synagogues around the country to implement the "Carlebach approach" to prayer services. The initiative is a response to the fact that "people come to shul for every reason except to pray" (i.e. people who do come to synagogue typically come for the sermon or the food); it is a response to the conviction that "prayer is not working" for most Jews today. The "Carlebach approach" to prayer incorporates two aspects:

- music ("feeling the melodies of the prayers", "making the prayers more alive and accessible")
- interrupting the singing to explain the meaning of the prayers (commentary beyond simple translation)

Carlebach-type services are rooted in traditional Chassidic prayers, yet they also incorporate some modern tools such as music and "spontaneity". These services are based on a model of one person inspiring others who, in turn, cause others to be inspired. The inclusion of running commentary on the services is an adaptation of the interpretive process that is already applied to *Chumash*/Torah study.

Rabbi Sam Intrator, the rabbi of New York's Carlebach Synagogue was an assistant rabbi to Rabbi Shlomo Carlebach when he was still alive and traveled with him "on the road". Now, Rabbi Intrator travels about once every other month to different synagogues (primarily Orthodox) to expose them to the "Carlebach approach" to prayer. Rabbi Intrator is hoping to get a grant to enhance the work he is currently doing; he aims to enable people in other synagogues to develop the "Carlebach model" on their own without having to rely solely on "performances" by "outsiders". With the Covenant Foundation grant, Rabbi Intrator is working with synagogues that already have adopted a "Carlebach approach" and is helping them refine their approach (e.g. the Happy Minyan in Los Angeles, the Aquarian Minyan in Berkeley). With additional funding, he hopes to make Carlebach-type prayer services more accessible to other synagogues.

Title of Synagogue Change Project: Chizuk Amuno Strategic Mission Statement Process & Campaign

Sponsoring Agency: individual synagogue: Chizuk Amuno Congregation-Baltimore, MD

Funding Sources: no outside funding; synagogue has extensive internal fundraising efforts (including a full-time development director and a full-time lay committee chair)

Summary of Change Initiative: In May, 1994, synagogue professionals and lay leaders decided to develop a mission statement ("defining who we are") and a "case" ("defining where we want to go") which would become an integral part of the congregation's 125th anniversary fundraising campaign. The case, in particular, would enable fund-raisers to inform potential donors about the planned uses of the money raised by the campaign. Objectives of the mission statement process and the campaign included the following:

- to embark on a campaign to raise endowment funds for new programming, personnel, and other recommended organizational changes and capital funds for physical plant improvements in honor of the synagogue's 125th anniversary
- to articulate the synagogue's mission statement and "define ourselves" at a critical milestone in the congregation's history (125th anniversary)
- to implement programs and make organizational changes that reflect the synagogue's mission
- to continue growing the membership of the synagogue, even after achieving full enrollment in all of the synagogue's schools (religious school, high school, day school, adult education academy, early childhood education program)

The process of developing the mission statement was facilitated by an outside consultant, Dr. Sheldon Dorph. The process involved a 32-member committee which represented every constituency in the synagogue: professional staff, board members, and representatives of all the committees and schools (early childhood, day school, religious school, adult education), and several older members who could provide "institutional memory". The 4-month process included the following components: extensive meetings of the committee, a retreat, and focus groups that attracted 200 congregants. Because of the sense of urgency of the campaign, the mission statement process was executed in a very expeditious manner. If the need for the campaign's case had not been so pressing, the change process might have included additional focus groups and the development of a long-range plan preceding the development of the case. The mission committee wrote its own mission statements in September, 1994. In September/October 1994, focus groups were conducted with congregants and additional data was collected. A preliminary mission statement was drafted in October; a final mission statement and report was released in November, 1994. Emerging from the process was the unanimous recognition that education was the driving force of Chizuk Amuno; this sentiment was expressed by everyone who participated in the mission statement process. The following institutional objectives emerged from the mission statement process:

- to create as many contexts as possible for Torah study in the synagogue
- to affirm Torah study as the historic and continuing organizing principle and centerpiece of all synagogue initiatives
- to implement our vision of our synagogue as "the education synagogue"
- to elevate congregants' awareness of the synagogue's educational focus and to consciously build synagogue programs around this educational focus

The "case" was successfully developed over the 6 months following the articulation of the mission statement (in 11/94), and has been used for fundraising purposes since 1995. Heightened awareness of and reinforcement of the mission statement has been accomplished by the publication and dissemination of appealing printed materials that convey that the synagogue is successful and clear about its goals. In addition, an engraved limestone representation of the mission statement now serves as the centerpiece in the main thoroughfare of the synagogue. So far, the campaign has been extremely successful, with a dramatic increase over voluntary participation in previous campaigns. The success of the campaign has been attributed to many factors including high standards ("You never achieve. You just up the ante."), and the active participation and support of a well-respected rabbi, an extremely capable lay committee chair who worked full-time on the campaign, and a full-time development director who came on staff by the beginning of the campaign.

Title of Synagogue Change Project: Cooperating Schools Network

Sponsoring Agency: Jewish Reconstructionist Federation (JRF)

Funding Sources: JRF and grants from the Covenant Foundation and the Bronfman Foundation. (In addition, some individual congregations' projects have been funded by grants from foundations and local federations such as the New Jersey Metrowest Federation).

Summary of Change Initiative:

The Cooperating Schools Network (CSN) provides opportunities for Reconstructionist congregations to develop expertise in a particular "value of spiritual peoplehood" and to become models of educational innovation for other Reconstructionist congregations. CSN envisions the synagogue as an intergenerational learning community with integrated education for children, adults, and families.

Specific goals of the CSN include:

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

Each of the 21 participating congregations focuses on one or more of the following "values of spiritual peoplehood": *kedusha*/ spirituality, *hidur mitzvah*/Jewish arts, *tikun olam*/ moral education, Hebrew language, *Tzionut*/Zionism & Israel, and *hokhma*/ Jewish thought and wisdom. The selected "value" serves as a "spiritual compass" for the congregation and as a thematic area of educational emphasis for the synagogue's intergenerational educational activities. The components of the CSN change process include an annual conference with members of all participating congregations' CSN committees, phone conversations with Dr. Jeffrey Schein (the national education director of the Jewish Reconstructionist Federation and the coordinator of CSN), an initial site visit by Dr. Schein during which he meets with the synagogue's CSN committee to get a visioning process underway (that focuses on one of the 'values of spiritual peoplehood'), two visioning exercises for each synagogue's CSN committee to do on its own, a meeting between Dr. Schein and each CSN committee to discuss the next steps, and the CSN committee's development of new curriculum materials and/or the implementation of existing curriculum materials. The implementation of CSN in its first cadre of synagogues began in 1993 (although one of the participating congregations, B'nai Keshet, received a grant to begin a CSN-like program as early as 1990).

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

Sponsoring Agency: Auerbach Central Agency for Jewish Education (ACAJE)-Philadelphia, PA

Funding Sources: Jewish Federation of Greater Philadelphia

Summary of Change Initiative:

The Designated School Program (DSP) aims to create better synagogue schools (i.e. with evidence of more effective learning) by encouraging synagogue schools to adopt a "systems approach" to organizations. The DSP's ultimate goal is educational change in the synagogue. Underlying the "systems approach" is the theory that each component of the synagogue contributes towards the synagogue's overall educational mission.

Synagogues participating in the DSP can opt to participate in an intensive 3-year change process that includes the following components:

- 1) adopting a systems orientation with an emphasis on partnership and role-modeling the collaborative effort
- 2) creating a steering committee that is comprised of all of the synagogue's professional staff members (rabbi, cantor, executive director, educator) and representatives of different constituencies in the synagogue
The steering committee writes job descriptions and develops the school's vision and mission statement.
- 3) empowering the school committee to be a process-oriented, goal-setting, decision-making body

DSP congregations can opt to participate in the 3-year intensive consulting intervention or they can opt to participate in pieces of the program (e.g. restructuring the school committee in a way that is consistent with systems theory or adopting a systems-based approach to teacher training). All participating DSP synagogues are guided through the change process by a consultant at the Auerbach Central Agency for Jewish Education, Dr. Jane Tausig. There are currently 7 synagogues in Greater Philadelphia that are participating in the Designated School Program. Three of these congregations began the DSP change process in 1994 and completed it in 1997, one of these congregations completed the process in 1998, and three synagogues are currently in their first or second years of implementation of the change process.

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

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

Funding Sources: Grants from the Mandel Associated Foundations, the Nathan Cummings Foundation, the Covenant Foundation, and the Gimprich Family Foundation

Summary of Change Initiative:

The Experiment in Congregational Education (ECE) is an initiative that seeks to transform synagogues into "congregations of learners" (i.e. synagogue communities where Jewish education is central and where Jewish learning takes place in a deep way throughout the congregation) and "learning congregations" (i.e. communities characterized by ongoing self-reflection, shared leadership between professional and lay leaders, and continuous deliberations aimed at problem-solving and self-improvement). It aims to change the synagogue's culture and organizational structure in order to make Jewish learning central to the life of the synagogue. The following components form the common pattern which guide the activities of all participating ECE synagogues:

- 1) an educational task force of 20-30 professional lay leaders that meets 6-8 times per year over a period of 2-3 years
- 2) a leadership team of 5-10 people that guides the work of the task force
- 3) an ECE advisor who spends 20 days per year assisting the leadership team and task force of each synagogue
- 4) study retreats (*kallot*) for all of the leadership teams from each of the participating congregations (five times during the first three years of the project)
- 5) ongoing evaluation by ECE staff researchers

At each participating congregation, the ECE task force engages in "readiness assessment", a visioning process, team-building, implementation and analysis of "community conversations", planning and implementation of early innovations, reflection on "best practices", and planning and implementation of major initiatives. While the road map of the ECE change process looks the same for all participating congregations, the journey looks different for each synagogue; ECE provides the template of steps each synagogue has to take, but the "how" and the "outcomes" are expected to look different at each site. Each of ECE's 9 advisors works with one or more of the participating synagogues to help the synagogue task forces implement the change process in their sites and to trouble-shoot as needed. Dr. Isa Aron, the coordinator of ECE, is one of the advisors.

Planning for the ECE initiative was precipitated by Sara Lee's educational consulting work with Congregation Beth Am (in Los Altos Hills, CA) and her understanding that in order to effect true changes in supplementary school education, synagogues needed to be changed in systemic and holistic ways. The kick-off event for ECE was a conference in Malibu in 1993 entitled, "Reconceptualizing Congregational Education". Papers presented at this conference and other commissioned works were published in 1995 in Aron, Lee, and Rossel's book, A Congregation of Learners: Transforming the Synagogue into a Learning Community.

There are currently 14 Reform congregations around the country that are ECE participants. In addition to the 2 'proto' synagogues that were "part of ECE before there was an ECE" (Congregation Beth Am and Leo Baeck Temple), there were 5 *vatikim* in ECE's first cadre that began to participate in ECE in 1993. In 1997, 7 *chadashim* synagogues constituting ECE's second cadre began their implementation of the ECE change process.

Title of Synagogue Change Project: Friday Night Alive

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

Funding Sources: Grant from the Jewish Continuity Initiative of the Jewish Federation of Greater Philadelphia and private donation from CMS Companies (CMS Foundation)

Summary of Change Initiative:

In 1997/1998, Friday Night Alive featured participatory innovative Friday night *Shabbat* services at 6 synagogues in the Greater Philadelphia area. The objectives of Friday Night Alive include: to enrich Jewish synagogue life in Greater Philadelphia by conducting Friday night "song and spirit" services that are similar to those at B'nai Jeshurun on Manhattan's Upper West Side, to expose people to the possibilities of what Jewish services have to offer and to the possibility that they can be exciting, and to inspire rabbis and congregations to explore more innovative and participatory ways of spiritually enhancing their prayer services. It is the ultimate goal of Friday Night Alive to inspire synagogues to conduct their own participatory services, not just to host Friday Night Alive services once a year or to become "Friday Night Alive synagogues". In 1997/1998, some of the Friday Night Alive services were led by B'nai Jeshurun staff (Cantor-Keyboardist Ari Priven and Rabbi Yael Ridberg) and some of the Friday Night Alive services were led by *Shabbat Unplugged*, a group of rabbinically-trained musicians who are students or graduates of the Reconstructionist Rabbinical College of Wyncote, PA. The Friday Night Alive services are characterized by participatory sing-along melodies interspersed with traditional *nusach*, instrumental music, singing rabbis in lieu of a cantor as *shaliach tzibur*, dancing in the aisles, and the use of the siddur "Service of the Heart". This siddur was specially designed for Friday Night Alive by Joe Lewis and Ellen Bernstein; it includes modern English translations and commentaries, convenient Hebrew phrasing, transliterations, instructions (e.g. when to stand, sit, and bow), and "Singlish" (singable English rhymed translations of the prayers). While the 6 synagogues that participated in Friday Night Alive in 1997/1998 were all Conservative (or Conservative/Reconstructionist), 6 of the participating synagogues in 1998/1999 are Reform and 6 are Conservative.

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

Sponsoring Agency: Jewish Continuity Commission of UJA-Federation of New York

Funding Sources: UJA-Federation Continuity Commission, which receives funds from the UJA-Federation of New York's annual campaign. In 1998/1999, \$3.5 million was allocated to the Continuity Commission from the Federation's \$120 million annual campaign.

Summary of Change Initiative:

The Continuity Commission was established in July, 1993, in direct response to the recommendations of UJA-Federation of New York's Strategic Plan. The Strategic Plan recommended that a Continuity Commission be formed to perform several functions related to Jewish continuity, including the implementation of a grants program that would "stimulate competitions in excellence" in all types of Jewish communal institutions (e.g. synagogues, JCC's, Hillels, and schools). According to John Ruskay, the first director of the Continuity Commission and the current Chief Financial Officer of the Federation, one of the overall objectives on the Continuity Commission is to provide solutions to the Jewish community's "continuity crisis" by expanding the focus beyond Jewish education as the single solution to the crisis and by working towards the creation of "inspired and inspiring" communities.

The objectives of the Continuity Commission's Grants Program include: "institutional transformation" and "institutional strengthening" (to strengthen or transform synagogues and other Jewish institutions into more compelling and dynamic communities of Jewish living and learning), to catalyze change in Jewish institutions (including, but not limited to synagogues), to generate institutional growth at the grassroots level, to provide resources to Jewish institutions in the New York Jewish community with an emphasis on Jewish education and identity development, to get Jewish institutions to think strategically about how they want to look in the future, to have a positive impact on the attitudes and behaviors of individuals in Jewish institutions, and to catalyze change in the UJA-Federation of New York and the New York Jewish community. According to Dr. Alisa Rubin Kurshan, the current director of the Continuity Commission, the Grants Program funds institution-wide initiatives as opposed to programs. It is premised on the belief that institutions best know how to transform themselves into compelling and inspiring Jewish communities. Thus, the Commission does not provide a specific template of change; each institution is required to undergo a serious strategic planning process which takes into account its unique institutional profile. Each institution's lay and professional leaders are required to develop and buy into their own vision of change and to identify their own creative and bold initiatives. However the Commission conducts public briefings every year regarding both the content and process of change, providing institutions with guidelines and concrete suggestions for their initiatives. Beginning in July, 1998, the Request for Proposals (RFP) invited applicants to define their initiative by one of the following "content-based goals or strategies of change": "Toward a Spiritual Community", "Toward an Inclusive Community", "Toward a Learning Community", "Toward Renewing Israel's Role in the Life of the Community", "Toward Enriching Jewish Culture in a Community", or "Toward a Social Action Oriented Community". For the first four years of the Grants Program (1994/1995-1997/1998), the Continuity Commission awarded three-year grants for large-scale institutional grant initiatives (with slightly lower figures for target-population grant initiatives) according to the following formula: Year One-100% funding (up to \$60,000 per initiative), Year Two-80% funding (up to \$48,000 per initiative), Year Three-50% funding (up to \$30,000 per initiative). For initiatives beginning in 1998/1999, the Commission awarded four-year grants according to the following new formula: Year One-80% funding (up to \$48,000 per initiative), Year Two-100% funding (up to \$60,000 per initiative), Year Three-60% funding (up to \$36,000 per initiative), Year Four-40% funding (up to \$24,000 per initiative).

Since the Grants Program began in 1994, 26 synagogue initiatives received grants from the Continuity Commission: 22 individual synagogues, 3 grants to denominational movements, and 1 community initiative that is a collaboration of 7 synagogues in Brownstone Brooklyn. The number of synagogue initiatives receiving new grants since 1994 has ranged from 2-7 per year. The following are some examples of synagogue initiatives that have received funding in recent years: experiential adult Jewish education for the unaffiliated, healing prayer services, intergenerational Jewish education for unaffiliated Jewish gays and lesbians, and community-building for new members and single adults.

Title of Synagogue Change Project: Initiative in Congregational Education

Sponsoring Agency: UJA Federation of Greater Washington and Board of Jewish Education (BJE) of Greater Washington (including donations from lay leaders/ philanthropists)

Funding Sources: UJA-Federation of Greater Washington

Summary of Change Initiative:

The Initiative in Congregational Education marks the beginning of a "comprehensive partnership" between UJA-Federation, the Board of Jewish Education, and synagogues in the Greater Washington area. It was introduced to Jewish education professionals and lay leaders at a kick-off event in the fall of 1998. The goals of the initiative include:

- to provide funding to congregational schools to enable the development of programs that meet agreed-upon criteria
- to provide resources that will help students and families view religious school as a place to learn to live and practice Jewish values (rather than as a "drop-off" Hebrew school)
- to gather and analyze data related to congregational schools for the purpose of sharing "best practices" and identifying areas of mutual concern
- to help synagogues strengthen their ability to be vibrant centers of Jewish life for congregants (by strengthening their schools)
- to strengthen the synagogue/BJE/UJA-Federation partnership and to foster a spirit of mutual trust around these institutions' shared educational vision
- to encourage and enable the Greater Washington Jewish community to work together on issues relating to synagogue schools and Jewish education

Beginning in 1999, each participating synagogue school will be receiving a grant of \$1,000-\$4,000 based on the number of students in the school. The grant process is non-competitive; all congregations that apply for grants are eligible to receive money. The following are the list of grant categories for the Initiative in Congregational Education:

- Jewish family life education
- teacher training and teacher recruitment
- curriculum specialists (in such areas as music, art, drama, Hebrew language, *tefillah*, social studies, and special needs)
- teen programs
- programmatic bridges between formal and non-formal education (through such modes as Jewish camping, retreats, or other modes of experiential education)
- purchase of educational materials (to support new programs)
- civics/social action/*tzedakah* curriculum

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

Sponsoring Agency: Koret Foundation

Funding Sources: Koret Foundation, with matching funds from participating synagogues

Summary of Change Initiative:

The Koret Synagogue Initiative (KSI) provides funding for participating synagogues to hire program directors (or assistant rabbis with programming responsibilities) who develop and implement programs aimed at building the Jewish identity and commitment of targeted segments of the synagogue population (such as young adults, women, families, non-members, etc.). Program directors aim to enhance synagogue life and promote synagogue change through the implementation of outreach and inreach programs. KSI's immediate objective is to "test the hypothesis" that the addition of a program director (or assistant rabbi with programming responsibilities) would enable each of the participating synagogue to do a much better job of strengthening its members' and non-members' Jewish identity and commitment, "thereby demonstrating that synagogues can play a critical role in the revitalization of Jewish life in America". KSI's short-term goals include: to build capacity in synagogues through the addition of a program director (or assistant rabbi) on staff, to provide a vehicle for institutional transformation, to make structural changes in the synagogue as an institution by changing the culture of the synagogue and its leadership, and to enable synagogues to reach their potential for positively affecting members' and non-members' Jewish identity by virtue of its three key roles: community-building, religious life, and education. KSI's long-term goals include: to enable the synagogue to become an agent of change for the San Francisco Jewish community at large, to enable the synagogue to assume its place with other Jewish organizations in promoting Jewish continuity and strengthening Jewish identity, and to serve as a national model so that funders can see how even a relatively small amount of money can make a big difference in how synagogues function.

Koret's vision is "more of a process vision", premised on the assumption that synagogues will do a better job of enhancing congregants' Jewish identity if they have increased personnel capacity (the addition of a program director position on staff). Koret does not dictate the kind of programming that each synagogue should implement, although most participating synagogues have some type of lay advisory committee which oversees the work of the program director. Beginning in 1998/1999, the KSI will expand its activities to include management consultation, training, and technical assistance to synagogues which will be provided by staff at the Koret Foundation.

The Koret Foundation initiated KSI in 1994. Prior to 1994, Koret functioned mainly as a foundation that reviewed grant proposals and funded various projects in Jewish institutions and other non-profit organizations. The KSI is part of Koret's new approach to become more proactive in such areas as Jewish identity and synagogue life. Since its inception in 1994, KSI has funded 8 synagogues in the San Francisco Bay Area (3 Conservative and 5 Reform). The first round of KSI began in 1994, with 4 synagogues each receiving \$45,000 per year (for three years) for the program director's salary and a programming and publicity budget. In years 1-3, each synagogue was expected to provide matching funds in the amount of \$15,000 per year. In years 4-6, Koret continues to provide funding to the synagogues but at a decreasing rate. In year 7, the entire budget for the program director, programs, and publicity is supposed to be funded by the synagogue. For the second and third round of participating KSI synagogues (beginning in 1997), Koret provided \$22,000 per year per synagogue (for the first three years) for a half-time program director's salary and a programming and publicity budget; each synagogue is expected to provide matching funds in the amount of \$12,000 per year.

Title of Synagogue Change Project: LA Council on Jewish Life: Synagogue Funding Program

Sponsoring Agency: Council on Jewish Life of The Jewish Federation of Greater Los Angeles

Funding Sources: Jewish Community Foundation

Summary of Change Initiative:

Founded in 1974, the Council on Jewish Life is under the auspices of the Jewish Federation of Greater Los Angeles' Planning and Allocations Department. The Council's activities include: convening community discussions on emerging issues of interest to the Jewish community, recommending new policies and programs, and enabling synagogues and other Jewish institutions in Greater Los Angeles to implement these new policies and programs. These activities aim to strengthen the Los Angeles community's commitment to Jewish continuity.

The Synagogue Funding Program, which began in 1981, administers grants from the Jewish Community Foundation to synagogues in Greater Los Angeles. Approximately two thirds of the \$100,000 provided by the Jewish Community Foundation each year is allocated to first-year programs and one third is allocated to second-year programs. The overall goal of the Synagogue Funding Program is to serve the Jews of Los Angeles by building a partnership between the Federation and the religious community. Through the Synagogue Funding Program, the Council on Jewish Life is able to stimulate programs, provide seed money, and encourage collaboration among institutions. The criteria for programs funded by the Council's Synagogue Funding Program have evolved over time. The Council seeks and support programs that are new and innovative, can be replicated in other settings, stimulate collaborations between synagogues and other agencies, promote closer synagogue/Federation relations, and foster a deeper connection to Judaism and Jewish living. In the 1980's, the Council primarily provided seed funding to programs that were new and innovative. Now, the Council seeks programs that involve inter-institutional collaborations and that focus on deepening individuals' Jewish commitments. It primarily funds programs that address the needs of "under-served" members of the Jewish community (e.g. former Soviet Jews) or that promote Jewish continuity (e.g. Jewish Family Education and teen programming)

Since its inception in 1981, the Synagogue Funding Program has provided funding to hundreds of synagogue programs. Between 1991-1997, 50 synagogues received grants through the Synagogue Funding Program (not including grants for collaborative initiatives). Orthodox, Conservative, Reform, Reconstructionist, and unaffiliated synagogues have all been recipients of grants. While there is no set minimum or maximum grant award per program, 1997 grants ranged from \$2,500 to \$10,000 per synagogue per program per year. Similarly, there is no set number of synagogues that can be offered grants in any given year; in recent years, 12-35 synagogues have received grants each year. Most programs that meet the criteria receive grants.

The following are some examples of programs funded by the Council on Jewish Life's Synagogue Funding Program: a family education program targeted to unaffiliated mixed-faith couples and their children at a Reform synagogue, a bi-monthly support group for gays and lesbians at a Conservative synagogue, a "Torah through Drama" program for senior citizens at a Chassidic shul, a support group for parents who have children with Attention Deficit Hyperactive Disorder (ADD-ADHD) at a Conservative synagogue, and a one-day seminar of lectures and workshops on "the mitzvah of mourning" at a Reconstructionist synagogue.

While staff at the Council on Jewish Life admit that the Synagogue Funding Program primarily deals with "smaller scale changes", they believe that these programs do make a difference in synagogues and in the lives of program participants. Furthermore, they note that the Council on Jewish Life has been involved in mobilizing some larger scale community-wide changes with such programs as the Israel Experience for teenagers.

Title of Synagogue Change Project: *Mashkon*: Blueprint to Transform Congregational Education

Sponsoring Agency: Board of Jewish Education (BJE) of Greater Washington and the UJA-Federation of Greater Washington

Funding Sources: Jewish philanthropists with children in Jewish supplementary schools in the Greater Washington area (the Bermans and Gelmans), in partnership with the BJE and the UJA-Federation of Greater Washington

Summary of Change Initiative:

In 1996/1997, a small group of concerned Jewish parents in the Greater Washington area (including some philanthropists) began to examine the reasons behind the problems of congregational school education. They turned to the Board of Jewish Education and the UJA-Federation of Greater Washington and asked:

- What are the essential tools needed to transform the educational landscape of the congregational school system?
- Can we make a significant difference in the spiritual lives of thousands of Jewish children?
- What if the resources were available to effect such transformations in children's lives and in synagogues?

In response to these challenges, the BJE began to forge a new partnership with UJA-Federation, congregational schools, rabbis, educators, and communal agencies. The first step was to create a plan or "blueprint" that provides an overall model to transform congregational Jewish education. *Mashkon* is designed to equip teachers with the skills and knowledge they need to bring elements of wonder, faith, and the search for meaning into their religious school classrooms. The effort began with the implementation of five pilot programs extracted from the larger blueprint. These carefully designed pilots represent a cross-section of programs that address some of the key concerns of Jewish parents in the Greater Washington Jewish community. Each of the following pilots was tested, evaluated, and modified in the first year (1997/1998):

- 1) **"To Create A Context of Meaning: A Curriculum and Teaching Training Module":**
an initial training unit on God challenges teachers to confront the difficult issues in their own lives concerning faith and meaning and enables them to transmit religious concepts in a meaningful way in the classroom
- 2) **"Jewish Teen Institute":**
a Wexner-Heritage-style program for teens consisting of highly stimulating, interdisciplinary mini-courses integrated into the school's ongoing programs
- 3) **"Sh'lom Kitah"**
an on-the-job teacher training program to provide the techniques needed to integrate students with learning difficulties successfully into the regular classroom
- 4) **"Beyond Arts and Crafts: A Jewish Family Life Education Curriculum for Young Children":**
an engaging, age-appropriate Jewish Family Education curriculum to help early childhood students and parents understand and experience the richness of Jewish holidays
- 5) **"Teachers' Center Web Site":**
an electronic resource center with the best print, video, audio, and software materials available for educators in formal and informal Jewish educational settings

Additional pilot initiatives that began to be implemented in 1998/1999 are the *Morasha*: Florence Melton Mini-School for Teachers and the *Bet Midrash* bi-monthly study sessions and end-of-year retreat for principals. Each of the pilot initiatives addresses an aspect of *Mashkon's* larger vision: to incorporate into the synagogue religious school's curriculum age-appropriate programs that specifically deal with "Judaism's understanding and response to the mysteries of life and the deepest concerns of the human soul". Since its inception in 1997, there have been 25 synagogues (Conservative, Reform, Reconstructionist, and unaffiliated synagogues from throughout the Greater Washington area) involved in one or more of *Mashkon's* five institutional pilot initiatives. Rather than transforming congregational education via a centralized large-scale initiative, *Mashkon* seeks to transform Jewish education in synagogues by transforming one classroom at a time.

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

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

Funding Sources: McKinsey consultants donate their time on a pro-bono basis.

Summary of Change Initiative:

The McKinsey Project's immediate short-term objective is to overcome barriers to change within synagogues by making synagogue leadership aware of the need for change, creating adequate administrative infrastructure for change, ensuring economic support for new initiatives, and gaining consensus among clergy, lay leaders, and other congregants. McKinsey's longer-term objectives include: to re-establish the synagogue as a vibrant center of Jewish living and learning and to ensure ongoing Jewish continuity and Jewish community. The McKinsey project provides a "value-neutral" process for enabling synagogues to achieve their own site-specific visions rather than utilizing a "cookbook approach" or imposing a specific change agenda. The process is modeled after McKinsey's strategic planning process for its other clients. Based on learning from its consulting work with clients in the business world, McKinsey's strategic planning process incorporates the following elements: working in teams, learning by doing, skilled facilitation, focusing on vision and objectives, and maintaining high energy throughout the process. Approximately once per month over the course of a year, participating synagogue teams (consisting of the rabbi, administrator, and 3-4 lay leaders) attend 9 workshops with McKinsey consultants and other participating synagogue teams. Each meeting starts out with a 20-30 minute session for all of the teams together, during which the topic for the evening is introduced. Then, the participants go into break-out sessions for approximately an hour, during which each individual synagogue team meets with its assigned McKinsey facilitator. The last segment of the meeting is another 20-30 minute session for the whole group, to give the different synagogue teams an opportunity to "cross-pollinate" and share ideas. The main program sessions are each devoted to one of the following topics:

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

Between each session that is facilitated by McKinsey consultants, each synagogue team is expected to meet on its own and to do some on-site work related to the previous program session's topic.

This project was initiated in 1993 by McKinsey consultants after some discussions with the UJA-Federation of New York's Continuity Commission. In the first year of the implementation of this project, ten McKinsey consultants volunteered their time to this pro-bono project. The first group of 11 synagogues (2 of which dropped out) participated in strategic planning workshops during the calendar year 1994. The next group of 7 synagogues (1 of which dropped out) participated in workshops during the academic year 1996/1997. The third group of 7 synagogues participated during the academic year 1997/1998. The 21 synagogues that have participated in the McKinsey Strategic Planning Workshops represent all the denominations: Orthodox, Conservative, Reform, Reconstructionist, and unaffiliated synagogues in the New York metropolitan area.

Title of Synagogue Change Project: National Jewish Outreach Program initiatives

Sponsoring Agency: National Jewish Outreach Program (NJOP)-New York, NY

Funding Sources: donations to the National Jewish Outreach Program

Summary of Change Initiative:

The overall objective of the National Jewish Outreach Program (NJOP) is to transform synagogues into outreach organizations. Working with individuals across the denominations, but primarily through Orthodox synagogues, NJOP implements the following initiatives (some of which may be considered synagogue change initiatives):

- 1) Crash Course in Hebrew Reading: to empower synagogue members who are "dormant" to learn Hebrew. NJOP screens and hires teachers, as well as providing teaching specifications, handbooks, and an instructional videotape. This program has reached 105,000 individuals in 2,100 synagogues around the country.
- 2) "Shabbat Across America"/ "Turn Friday Night Into *Shabbat*": to enable synagogues (primarily Orthodox) around the country to implement interactive Friday night programs (services and dinner) during which participants can interrupt the service or meal to ask questions. While synagogues implement the Friday night programs on their own, NJOP provides specifications, handbooks, and an instructional videotape. This program has reached 70 congregations around the country.
- 3) Beginners/Learners Services: to enable synagogues (primarily Orthodox) around the country to implement a traditional *Shabbat* service that is geared to beginners, in which participants do the *dvar Torah* (in lieu of a rabbi's sermon) and in which participants can interrupt the service to ask questions. These services are an opportunity for synagogues to "mainstream" people. NJOP provides specifications, handbooks, and an instructional videotape.
- 4) Outreach Directors in Orthodox Synagogues: to place full-time outreach directors in Orthodox synagogues. So far, NJOP has placed 4 full-time outreach directors and 1 part-time outreach director in Orthodox synagogues around the country: California, Florida, New Jersey (West Orange), and New York (Long Island and Brooklyn). NJOP provides a matching grant of \$25,000 for each full-time outreach director.

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

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

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

Summary of Change Initiative:

The objectives of the L.E.A.D. Rabbinic Fellowship Program include: to develop "leadership" and "vision" among younger Orthodox rabbis through project-based training, to develop a core of rabbinic leaders who can serve as mentors to other rabbis, and to have an impact on national Orthodox organizations (i.e. to change policy in the Orthodox movement by bringing some younger rabbis into leadership positions in Orthodox organizations). Operational objectives of the Rabbinic Fellowship Program include: to provide formal in-service training to rabbis based on well-known leadership development models in business and the military, to implement projects in the synagogue and in the local Jewish community which would serve as a training "laboratory" for the participating rabbis, and to create a professional esprit between and among the participating rabbis (so that rabbis feel less alienated which, in turn, will transform synagogues because rabbis will network with each other about projects, programs, and sermons).

The 15 Rabbinic Fellows who participate in this program attend 4 major training sessions over the course of 2 years (one session per semester). Topics covered in these training sessions include: conflict management, TQM (Total Quality Management), strategic planning, change management, negotiation skills, relationship management, and communication skills. The training sessions give Rabbinic Fellows the opportunity to meet with executives from Jewish communal organizations, business executives, and senior rabbis. All Rabbinic Fellows are required to undertake two local projects, one within their synagogues and one outside of their home congregations in collaboration with local Jewish community organizations (e.g. local JCCs, Federations, or campus groups). These projects are supposed to effect change in the synagogue and in the local Jewish community. Some examples of projects include: educational programs on domestic abuse and the establishment of an abuse hotline, Jewish educational programs accessible to the learning disabled, and educational programs targeted to FSU (former Soviet Union) immigrants.

Dr. David Schnall, who is part of the leadership of the Orthodox Caucus and is the Herbert Schiff Professor of Management and Administration at the Wurzweiler School of Social Work at Yeshiva University, consults with each Rabbinic Fellow on an as-needed basis. A variety of other specialists work with the Rabbinic Fellows at each of the professional development training sessions. Dr. Schnall conceived of the program in September, 1995 and applied for a grant from the UJA-Federation of New York's Continuity Commission in 1996. The 15 rabbis who are currently Fellows in the program represent 15 Orthodox synagogues around the country and in Canada. They have each committed to participate in this program for two full years, from January, 1997 to January, 1999.

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

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

Funding Sources: Pilot program funded by a grant from the UJA-Federation of New York's Continuity Commission; Consulting fees of part-time facilitators funded by UAHC; UAHC plans to fund PSC through its operating budget after the grant runs out in 1999.

Summary of Change Initiative:

The objectives of PSC include: to build partnerships and relationships among synagogue leaders, to develop leadership skills among synagogue professionals and lay leaders, to transform the temple leadership's job description and experience from a "corporate" model to one that embodies the values of Judaism and the religious values and purposes of their synagogues, and to improve synagogue leadership as a lever for creating large-scale synagogue change. PSC's vision of synagogue life is a new model of synagogue board service that incorporates values-based decision-making, team-based leadership, and personal growth. It envisions a synagogue governance structure that embodies the vision of a synagogue as a nurturing covenantal community which is rooted in Jewish values; it envisions board experiences for lay leaders and professional that are more spiritual and less "corporate".

PSC engages synagogue leadership teams in three years of systematic training, supervision, and inspiration to broaden leaders' Jewish literacy, Jewish "citizenship" (lifestyle and role-modeling), spiritual awareness, individual goal-setting and management abilities. The PSC training program includes the following elements: observation and feedback at synagogues, study guided by an integrated curriculum, retreats, an ongoing facilitating/consulting process, "celebration", and evaluation. Each participating synagogue is required to assemble a team of 6-8 people, including the rabbi, the president, and present and future lay leaders. Generally, each team consists of 2 professionals and 4-6 lay leaders. Each synagogue team meets once per month with an assigned facilitator from UAHC/GNYCRS; the facilitators have expertise in areas such as organizational behavior, social work, education, and communications. The specific content of monthly team meetings varies from synagogue to synagogue. Although the Experiment in Congregational Education (ECE) is not formally connected to PSC, two of the facilitators have been involved in ECE; thus, all PSC synagogues are engaged in ECE activities such as "visioning" and "community conversations". All meetings incorporate Jewish text study. While the original intention was to have two retreats per year for all participating synagogue teams, the current process has been revised to reduce the number of retreats because of the divergent needs of the synagogues involved. In addition to meeting monthly with the synagogue teams, all of the facilitators also meet once per month with Richard Abrams (Director of PSC at UAHC), Rabbi Peter Schaktman (Director of GNYCRS), and Rabbi Julie Spitzer (Assistant Director of GNYCRS). Four Reform synagogues in the New York metropolitan area have been participating in the PSC pilot since its kick-off retreat in 1997.

Title of Synagogue Change Project: Synagogue 2000: A Trans-Denominational Project for the Synagogue of the 21st Century

Sponsoring Agency: Synagogue 2000 is an independent organization; Principal Investigators' offices are housed at the University of Judaism (Los Angeles) and Hebrew Union College-Jewish Institute of Religion (New York)

Funding Sources: Grants from the Nathan Cummings Foundation, Steven Spielberg's Righteous Persons Foundation, and the Shirley and Arthur Whizin Trust

Summary of Change Initiative: According to Rabbi Larry Hoffman and Dr. Ron Wolfson, the individuals who initiated Synagogue 2000, the objectives of Synagogue 2000 include: to re-energize and "respiritualize" the American synagogue, to transform the synagogue from a place that caters primarily to children to a place of Jewish spiritual growth for adults of all ages, to change the synagogue from a place of "old-world ethnic appeal" to a place that has a "spiritual message" for all who seek meaning, to make synagogues into "spiritual centers" where people can pursue their Jewish journeys and find God's presence, to make synagogues more religious and less institutional, and to make synagogue life more meaningful and relevant to American Jews. Synagogue 2000 envisions the synagogue of the 21st century to be the spiritual center of members' lives, where an impersonal synagogue is changed into a place of warmth and welcome, where the way in which synagogues "do their business" is changed from hierarchical and bureaucratic to personally enriching, and where prayer services are "compelling and compassionate". In its attempt to "re-spiritualize" all aspects of synagogue life, Synagogue 2000 targets the following areas: 1)Prayer, 2)Healing, 3)Good Deeds/Social Justice, 4)Study/Learning, 5)Institutional Change, and 6)Ambiance/ Synagogue Design/ Sanctuary Space. These 6 key themes form the acronym PISGAH: Prayer, Institutional Change, Study, Good deeds, Ambiance, and Healing. While the overall objective of Synagogue 2000 is to "respiritualize" synagogues, the specific definition of what it means to "respiritualize" and the strategies of how to "respiritualize" are determined by each synagogue within the broad context of the definition of "Jewish spirituality" provided by Synagogue 2000. Ultimately, each synagogue should work on all 6 points of the PISGAH, but each synagogue started out its change process by focusing on either "prayer" or "healing"; all synagogues are also working on "ambiance".

The "theory-in-use" for Synagogue 2000's change process is that within each synagogue, a "core group" of 5-7 people will radiate its enthusiasm, energy, and knowledge to a larger "change team" of 20-30 people (consisting of clergy, lay leaders, 'movers and shakers' and 'peripheral' congregants) who will, in turn, inspire the same enthusiasm throughout the synagogue infrastructure and to members and potential members of the synagogue. Then, it is hoped that the process will be reproduced at the city, regional, and national level. Each participating synagogue's "core group" of 5-7 people attends an annual retreat in Ojai, CA. Retreats incorporate a team approach and "experiential learning characterized by intellectual seriousness and emotional intensity". At the first retreat for Synagogue 2000's 16 pilot synagogues (December, 1996), the core groups were given a set of curriculum materials ("itinerary") on one area of emphasis ("track") -either "Prayer" or "Healing". Each "itinerary" or curriculum binder included instructional materials with agendas, process techniques, text-based study materials, resources, and suggested ways of conducting meetings throughout the year. After the 1996 retreat, each synagogue's "core group" met approximately once per month with the rest of its synagogue "change team" using the "Prayer" or "Healing" curriculum itinerary as a guideline for each meeting. In addition, each synagogue's "change team" had to implement "low-hanging fruit" projects- concrete and manageable projects that contributed towards the synagogue's ultimate goal of respiritualizing the synagogue through the route of prayer or healing. The theme of the second retreat for the 16 pilot synagogues (December, 1997) was "Respiritualizing the Infrastructure of the Synagogue". At the retreat, each synagogue's "core group" was given a new set of curriculum materials ("itinerary") for the following year's "change team" meetings. The "itinerary" for 1998 included a choice of four possible routes for respiritualizing the synagogue: 1)Marketing, 2)Membership Process, 3)Jewish Journey Groups, and 4) Track-Deepening (continuing to focus on the "prayer" or "healing" track from the previous year. During Year 1 (1996/1997), each of the 16 synagogue teams was assigned a liaison from Synagogue 2000's liaison team; most of these liaisons had other full-time jobs and just provided advice to congregations on an as-needed basis. In Year 2 (1997/1998), Adina Hamik and Ellen Franklin were hired as full-time project associates; they each have ongoing, regular contact with the 16 pilot synagogue teams.

Title of Synagogue Change Project: Synagogue Initiative Program (SIP)

Sponsoring Agency: Commission on Jewish Education (CJE) of the Jewish Federation of Greater Hartford

Funding Sources: Endowment Foundation of the Jewish Federation of Greater Hartford

(Note: *La'atid*, the new synagogue change initiative that is an outgrowth of SIP, is receiving grant support from the Jewish Federation of Greater Hartford, the Endowment Foundation of the Jewish Federation of Greater Hartford, and the Covenant Foundation).

Summary of Change Initiative:

The Synagogue Initiative Program (SIP) envisions the synagogue as an inclusive community in which all constituents are engaged in the planning and implementation of the synagogue and supplementary school's vision, mission, and programs. Furthermore, it envisions the synagogue as a community that is focused on developing a strong sense of Jewish identity in all of its members by providing opportunities for Jewish living and learning for people of all ages. SIP's objectives include nurturing "a strong sense of Jewish identity, knowledge, and living" in synagogue members of all ages and "re-engineering" synagogues and supplementary schools by creating partnerships among a broad base of professionals and lay leaders and engaging all constituents in the planning and implementation of the synagogue and supplementary school's vision, mission and programs. SIP also aims to make the supplementary school a "pivotal core" of the congregation, to create a synagogue atmosphere that is conducive to Jewish educational pursuits at all levels, and to train professional and lay leadership to be able to continue the process of change. An underlying assumption of SIP is that the most successful synagogue schools are those that are viewed as central to the concerns and mission of their host synagogues. Consistent with the theory of "systems change", the school and synagogue must both regard themselves as integrated parts of a greater whole.

The SIP process incorporates the following components:

- 1) Initiating the Systems Change Process:
 - formation of a SIP committee in each synagogue, consisting of the rabbi, cantor, principal, teachers, and lay leaders representing various committees
 - workshops and conferences related to synagogue/school systems change and Torah study
 - survey of the synagogue's structure and needs
 - workshops aimed at developing the synagogue's vision, mission statement, and action plans
 - ongoing planning and collaboration among a broad base of the synagogue's constituents
 - SIP committee meetings with CJE consultants approximately once every other month
 - SIP sub-committee meetings with CJE and outside consultants approximately once per month
 - retreats for 10-15 people from each synagogue approximately twice per year
 - mini-courses on synagogue change and leadership development at Hebrew College's Hartford Branch
- 2) Implementation and Experimentation:
 - implementation of the synagogue and school's action plan which incorporates new experimental approaches and which reflects the vision and goals of the synagogue and school
- 3) Professional and Lay Leadership Development:
 - ongoing training and modeling through workshops, retreats, and courses for synagogue lay leaders and professionals to enable them to facilitate all aspects of SIP,
- 4) Evaluation:
 - ongoing formative evaluation process and summative evaluation coordinated by CJE in collaboration with SIP institutions

SIP is a trans-denominational change initiative for synagogues in the Greater Hartford area. Its 2 pilot congregations (one Conservative and one Reform) began to participate in the SIP process in 1996/1997. Since its inception, Sandy Dashefsky has been the coordinator and primary consultant to the SIP congregations.

Title of Synagogue Change Project: Synagogue Leadership Initiative (SLI)

Sponsoring Agency: UJA-Federation of Bergen County and North Hudson

Funding Sources:

Year 1: Taub Foundation

Year 2: Taub Foundation and the UJA-Federation's Continuity Commission

Summary of Change Initiative:

The Synagogue Leadership Initiative's planning process began in August, 1997 with the following objectives in mind: to strengthen synagogues in the Bergen County/North Hudson Jewish community, to develop strategies to address challenges confronting synagogues, to engage community leaders in tackling the challenges facing synagogues, to crystallize the mission of each participating synagogue, to provide leadership development opportunities for professional and lay leaders in synagogues, and to empower synagogues to transform the lives of Jewish individuals, Jewish families, and the Jewish community. The Synagogue Leadership Initiative envisions synagogues as caring, supportive communities which are centers of spirituality, lifelong learning and community (*Beit Tefillah, Beit Midrash, and Beit Knesset*).

In its planning phase (1997/1998), the Synagogue Leadership Initiative encompassed the following components:

- leadership consultation meetings which encouraged synagogue leaders to begin a process of self-reflection by asking such questions as, "What do I want my synagogue to look like?"

- a spring symposium (held 3/22/98), which brought together 145 rabbis, congregational presidents, and other significant professional and lay leaders representing 39 of the Federation's 50 synagogues to explore the vision of the synagogue as an institution that can transform the lives of individual Jews, reach the Jewish family, and shape the Jewish community

The symposium included a keynote address by Rabbi Saul Berman of Yeshiva and Columbia Universities and workshops focused on "translating the vision of the synagogue into reality" which highlighted synagogues that view themselves as having had successful change. The Symposium offered workshops on the synagogue as a *Beit Midrash*, as a *Beit Tefillah*, and as a *Beit Knesset*.

- a seminar on synagogue self-assessment (held on 5/26/98)

A total of 44 synagogues in the region, from across all the denominations (Orthodox, Conservative, Reform, Reconstructionist, and unaffiliated), participated in at least one component of the Synagogue Leadership Initiative's pilot phase in 1997/1998: leadership consultation meetings, the symposium (3/22/98), and/or the self-assessment seminar (5/26/98).

Note: Under the leadership of Judy Beck, the new director of the Synagogue Leadership Initiative as of spring '98, the initiative will be undergoing substantial revisions in 1999. It is likely that the initiative will move away from a "frontal approach" to synagogue change and that it will shift its focus beyond "one-shot" conferences and symposiums. The Initiative projects the establishment of collaborative programs, consultative services, and ongoing workshops.

Title of Synagogue Change Project: Whizin Institute for Jewish Family Life

Sponsoring Agency: Whizin Institute for the Jewish Future at the University of Judaism-Los Angeles, CA

Funding Sources: Participants pay for accommodations and for class tuition for the summer institute. The Whizin Institute provides small grants to some synagogue teams. Individual synagogues often fund their team members. Some local communities also provide financial assistance.

Summary of Change Initiative:

In 1989, Shirley and Arthur Whizin endowed the Whizin Center for the Jewish Future through a \$4 million gift to the University of Judaism (Los Angeles, CA). The Whizin Center's mission was to create 3 academic institutes within this center that would explore the three areas of the family, the synagogue, and the Jewish community. The Whizin Institute for Jewish Family Life is the academic institute devoted to exploring the family. The Whizin Institute for Jewish Family Life's objectives include:

- to train synagogue and community leaders in Jewish Family Education techniques
- to use a team approach to better the quality of Jewish Family Education implementation
- to send each synagogue team back home with a core group of influential Jewish Family Education supporters
- to enable Whizin participants to return to their host institutions (including synagogues) with a new way of viewing these institutions

Each summer, leaders of Jewish institutions (including, but not limited to synagogues) are invited to participate in a week-long institute at the University of Judaism (Los Angeles, CA) with the notion that they will come to Whizin and hear some of the best new approaches to Jewish Family Education and return home inspired. Every year, Whizin accepts a maximum of 125 people, giving preference to synagogue teams. An emphasis is placed on attending Whizin's summer institute as a team and returning to the home community with that team in place. The Whizin Institute teaches people the need to think systemically instead of programmatically about Jewish Family Education. Whizin does not promote any one specific vision of Jewish Family Education for participating institutions. However, the Whizin staff aims to have institutional teams return to their host institutions with the understanding that Jewish Family Education is not just an add-on program, but that it is a lever for institutional change.

Whizin has a think tank, headed up by Dr. Ron Wolfson, which convenes each year to discuss and brainstorm the latest Jewish Family Education techniques. Many of these people serve as the faculty for the summer training institutes, including Helene Appelman, Joan Kaye, Vicky Kelman, and Susan Shevitz. Adrienne Bank has studied the effect of Whizin on the teams and their communities. Since 1989, the Whizin Institute has trained hundreds of professionals and lay leaders from synagogues (and other educational institutions, including JCC's) across all the liberal denominations-Conservative, Reform, and Reconstructionist.

To: Colleagues

From: Ellen

Attached is a summary document of the study that Sally Gottesman carried out. The goal of her study was to scan the field of Professional and Lay Jewish Leadership Development by interviewing people who had responsibility for running those programs.

The purpose of the attached document is to provide the interviewees with a summary of the study. Thus, the audience is those who participated in the study.

In addition, there is an afterward that summarizes the scans we commissioned of the different fields of leadership development (education, business, non-profit and lay). This afterward provides a lens to begin to think about the field of Jewish educational leadership development in terms of the larger field of leadership preparation and development.

JEWISH EDUCATIONAL LEADERSHIP DEVELOPMENT

In the Spring of 1998 the Mandel Foundation-New York (formerly, The Council for Initiatives in Jewish Education) commissioned a study to scan the landscape of leadership training programs in the Jewish community. The following report summarizes what was learned in interviews with over 40 individuals who have responsibility for professional or lay leadership education programs. The list of interviewees includes people responsible for a wide range of national and local organizations.¹ There was no predisposed definition of what constitutes a Leadership Training Program. This report is an attempt to “be where the thinking in the field is”. Thus, any self-described Jewish Leadership Training Program qualified. In the broadest sense, the findings “run the gamut” because some of the programs that call themselves “leadership training” vary in length from “three hours” to “three years.”

The results of our interviews are summarized separately for lay and professional leadership training programs and provide information about the following areas : **types of programs, goals, program characteristics, recruitment of participants, and challenges.**

Training the Professional Educational Leader

Types of Programs

In total, 27 interviews were conducted pertaining to professional leadership development programs:

- *Eight programs were degree-granting-* These programs are for full-time or part-time students at Jewish colleges and universities. These range from full-time Masters programs at schools such as the Jewish Theological Seminary, to part-time programs at local colleges, such as Cleveland College of Jewish Studies.
- *Nineteen programs were non-degree granting,* almost exclusively for professionals who are already employed by an organization. Many of these programs are “professional development” programs, ranging from in-house lectures to full-year courses offered in conjunction with a local university. Central Agencies for Jewish Education, national organizations, and local federations have some form of non-degree granting professional leadership training.

¹See appendix for a list of programs included in the scan.

Goals

- **The goals of the degree granting programs are very general in terms of preparing personnel for positions in Jewish education.**

As one interviewee commented, the programs at his institution are geared “. . .to create professional leaders who understand the importance of creating holistic environments of study, and to train the best possible graduates for Jewish institutions and organizations and to assume leadership roles in their jobs.”

- **Non-degree granting programs aim to improve the personnel of currently employed Jewish educators.**

“Our goal is to enhance Jewish knowledge and skills of the participants as well as the professional and management skills. We seek to integrate the two as well as always be sure to address the question, ‘what does this mean to the individual participant and their leadership in the Jewish community?’ This course has made a tremendous impact on our Jewish community because it has taught people to think more about, ‘what are the Jewish policies in our organization?’

Program Characteristics

- **The curricula of the programs vary, but all programs have Jewish Studies and leadership components.**

All interviewees mentioned a tension between “educating our students in ‘Jewish topics’ and offering our students leadership and management skills.”

For example, one program recently changed the curriculum in response to this tension: “In response to organizational demand (i.e. job requirements in the marketplace) and interviews with alumni, we began a program which we hope will increase the management skills and ‘risk-taking’ of our students. We reduced the required course-load in other areas.”

- **To improve linkages to the field, most degree granting programs try to incorporate some aspect of formal mentoring.**

In many respects, mentoring is the central component of the leadership training offered. In several schools, the constraint on the number of students is due to the limited number of “field placements” and “mentors” rather than the number of students who can fill the classroom.

“Our affiliation with schools and our (denominational) movement is vital to our training because it allows us a place to provide for research, training, and mentoring experiences for faculty and students.”

- **Faculty from the institutions of degree granting programs teach in the leadership programs, while non-degree granting programs tend to use outside teachers as well as on-site staff members.**

In degree granting institutions, it is the faculty of the particular institution who teach leadership classes, although from time to time, specialists in the community are asked to give lectures. By and large, many interviewees bemoaned the fact that finding quality faculty who can integrate Jewish content and leadership is a major constraint.

As one President of an institution said, *“There are a lack of people who can integrate leadership training with Jewish thought – it takes time and those who teach these subjects must give it a lot of thought to do it well. The problem is that most Jewish scholars are scholars – and don’t think about these issues very much.”*

Recruitment of Participants

- **Degree Granting Programs face recruitment challenges**

Everyone bemoaned recruitment as a primary concern of the field of Jewish education, both for the field itself and the impact on an institution’s ability to offer “quality Jewish leadership training.” The interviewees said that it was difficult to work with students who are not of the highest quality and try to develop them as leaders. This difficulty stems from a number of issues. Most students do not have any prior experience in education, Jewish education or related fields. Many students do not have a comprehensive background in Jewish studies. Some of the institutions do not have high standards of admission. In essence, people said, *“because we are unable to recruit quality people into the field, it is almost impossible for us to produce quality leaders.”* Variations on this were offered again and again:

- The best and the brightest go into the rabbinate rather than education. This can be attributed to:
 - higher salaries
 - greater prestige, mystique and respect
 - more opportunities for advancement

As a director of a program for rabbinical students and educators said, *“One of the biggest problems our community faces is that with rare exception, quality people are not entering into the field of education. Our program is almost entirely filled with rabbis. And the truth is, we still have to stretch our standards in order to allow education students in. It is very disheartening.”*

- There are many pre-service experiences for potential Jewish educators (i.e. working in a camp, a Hebrew school, etc.) and these experiences are often negative ones. In contrast, there are no direct pre-service experiences for

rabbis. Thus, many people choose to become rabbis rather than educators. As one Director of Education stated, *"I have seen many people who are considering whether to become a rabbi or Jewish educator decide to work for a while in the field of Jewish education. Their experience is the following: they are poorly supervised, the kids are unruly, and they don't feel they are making an impact. So they decide to become rabbis instead, figuring in this case, the devil they don't know is better than the devil they do."*

- Full-time programs are by-and-large filled with young people who have not had any, or a great deal, of work experience. Older people, who are more keenly aware of salary and life-style issues, tend to shy away from Jewish education as a career. (Although many people mentioned that salaries for senior administrators are rising.) In addition, some full time programs have an Israel component, which may not work for potential applicants. *"The majority of our students are in their early twenties and have not had a great deal of work experience. Thus, many leadership skills we are teaching are 'like theory' to them, whereas with older, more experienced people they are able to translate our training from the theoretical to the practical."*
- An increasing number of people with weak Jewish backgrounds are interested in a career in Jewish education. This affects a school's curriculum because they feel they must devote considerable attention to Jewish studies. This problem was repeatedly mentioned. *"We have a major problem in that many more students are coming to us with poor backgrounds in Judaism itself. Thus, we must devote an increasing number of class hours to 'Jewish classes' and reduce the number of hours in which students study 'other subjects – including leadership skills'."*
- The regional schools (i.e. Boston, Cleveland, etc.) primarily serve the local community. Few people move to a city because of a training institution, especially since the majority of people study part-time.

The "lack of competition" among schools is an important dilemma to note when broadly considering how to influence the field of Jewish education. To put it simply, few students move to attend a regional school (such as Boston Hebrew College or Graetz College). And, although students do move to attend schools such as HUC or YU, these institutions draw the vast majority of their students from within their own denominations. Thus, there is a "low level of competition" between institutions.

- There has been little success in attempts to recruit people into Jewish education who currently work in public or private schools. One director of a Masters program in Jewish Education noted,

"We will definitely have to invest greater resources of time and money to locating those people who may be interested in 'crossing-over' to Jewish

education. In fact, we will need to devote greater resources overall to recruitment. This year we advertised in school-administrator publications and sent information to every Bureau of Jewish Education and every Jewish school in existence. And we were still quite disappointed in the numbers of people who were interested in our program, despite the fact that it is clearly a well-funded, quality program associated with a premier institution. So next time we will both have to spend more money as well as place greater importance on developing personal connections to recruit people."

And another Jewish educator said, "When we first designed the program it was our hope to encourage really outstanding people from other careers to think about entering the Jewish world and this has not worked. It has been successful with people who were inclined this way already and with some second career people – but real shift, this has failed."

Despite these facts, most schools were at or near enrollment.

- **Non-degree granting programs tend to recruit locally, through self-selection or through an expectation of participation at the place of work.**

Challenges

Degree Granting Programs:

- **There is no continuum of programs for graduates.**

By and large there are no programs for alumni of individual institutions. Therefore, there is not a clear progression of continuing education and degrees for the field. Few programs have clear prerequisites for admission in terms of specific degrees and programs.

- **There are limited opportunities for formal induction into Jewish education.**

More than one person recommended that the Jewish community, or some institutions, determine how to create residencies for graduates.

"How to find year-long residencies for people who have finished formal education ... so they are capable of being hired (like MD programs) is crucial for our community to consider. There is often a great deal of longevity in private school careers – and we, as a community, do not invest enough in the education of our educators. What the recent alumni are missing the orchestration piece – the practice of putting it all together ... not on their first jobs but in an environment dedicated to their learning. We need to find ways to create practical experiences for people before they are hired into permanent positions. This is especially true because small schools

need better people more now than ever before. This is a crucial issue and this model is a rich and important one."

- **There is little evaluation of program impact.**

Few interviewees thought it was possible to measure the impact of leadership training on students. As suggested, many people interviewed did not think they were actually preparing leaders in their programs. Therefore, if they evaluated leadership, there would be misalignment between the evaluation criteria and the program curricula. Several programs directors were reluctant to evaluate students because they thought that "only a handful" of their students would truly be leaders.

"We aren't attracting potential leaders into the program, so that despite our efforts at leadership education, the impact is still not what we would like. All is not lost – we are helping to mold some better educators. But if we are talking about visionary leadership, I have to question the impact we are having."

One school had a unique program which addressed this issue, *"we know that all our graduates won't be leaders. So we tap those who we think have the greatest leadership potential and we offer them stipends, extra classes, registration fees for conferences, and meetings every two weeks with leaders in the Jewish world. This way they are exposed to today's leaders and how they think – and hopefully this will also give them the opportunity to develop their own skills and begin to see themselves as leaders."*

Others noted, *"Schools measure impact by whether or not we place our graduates. And yes, we are placing our graduates."* Indeed, some interviewees felt that due to the lack of experienced professionals in the field, several of their graduates had received "leadership positions" which were *"senior for the graduates at this point in their careers."*

"Time will tell" was perhaps the attitude which most predominated the discussion of impact. As one interviewee said *"we haven't been doing concerted leadership training for all that long. We will need time to evaluate its success and failure."*

- **People were not satisfied with the types of leadership development programs available for professionals.**

Interviewees commented that their programs are not rigorous. However, they explained this may be the case because the incentives are not there. They felt that the field of Jewish education does not value their graduates and does not offer them adequate status. Furthermore, money is not allocated for the task of training leaders.

In many respects, leadership development for adults in degree-granting programs mirrors the frustration people feel about Jewish education for children, *"...people talk a great deal about how we have to have more, but in fact, in many places in the community the reality is that hours are*

shorter than ever before.”

A significant environmental issue affecting these programs is that jobs are available for the graduates of these institutions. (*“Not a week goes by when I don’t get a call for someone looking to fill a position with an experienced, quality educator.”*) Thus, pressure to change or excel is not being placed on them directly by the market-place. Rather, it is a general sense of despair about Jewish education that seems to be the primary cause of their evaluation.

- **Interviewees were surprisingly unfamiliar with what other schools were doing in terms of leadership education.**

There are very few forums for authentic sharing and discussion about what each program is trying to accomplish.

Non-Degree Granting Programs:

- **Non-degree training of professionals face the following challenges:**
 - high overlap in need for Jewish, communal and skills training;
 - significant problems with retention and burn-out (including lack of attention paid to caring for professional and career planning);
 - significant time and money constraints;
 - few long-term programs available with planned curriculum, and if they are available, they are “seemingly” expensive investments in staff;
 - organizational mentors and national networking are important.

The “graduates” were considered to be “positive forces” in their workplaces, in terms of both management skills and their ability to make Jewish values more central to their institution or organization.

There was, nevertheless, concern that some of the participants “left their professional positions” in the Jewish community shortly after the program was over and “took their human capital elsewhere.” In smaller communities, where fewer jobs are available this was of lesser concern.

Among the major issues addressed in this area was the feeling that there are insufficient evaluative goals for staff training at different levels throughout an organization and thus, there is tremendous reluctance to heavily invest in training because people do not know how to “value” it and whether it makes a difference. The one exception to this seems to be in the area of fundraising. Organizations are much more willing to train their professionals in fundraising because it is very easy to measure results.

It was noted that “mid-level” employees are likely to leave the “Jewish world” thus employers are

unwilling to invest heavily in their education whereas “expensive leadership training programs” for high-level executives are often costly because there is a very limited number of “top-positions” for which to train these individuals.

TRAINING THE LAY LEADER

Type of Programs

Twenty-four interviews were conducted in which Jewish Lay Leadership Training was discussed.

Seven programs were “local” Federations which confined their work to a specific geographical region. These programs train lay leaders to enhance the specific mission of their own organizations. *“Our mission is to train a new generation of young leaders committed to our organization's mission.”*

Seventeen programs were “national” organizations (i.e. concerned with leadership throughout the United States), although many of these program used a combination of National and Local training with their students (for example, the Wexner Heritage program trains people in their home communities but also has National gatherings participants which are integral to their training program). About one-fourth of these programs are truly national in scope, such as Wexner. These programs train lay leaders to enhance the “Jewish people” and are quite particular in their selection process. Three-fourths of the programs are aimed at specific national level organizations (such as, American Jewish Committee, New Israel Fund).

Goals

- **Lay Leadership programs have varied goals:**
 - To bring people closer to the organization (vision, culture, etc.);
 - To help people understand the work of the organization and to train them to be able to talk with others about the organization;
 - To increase the number of people donating time to the organization, the amount of time each individual gives, and to increase the effectiveness of the time they give;
 - To increase the amount of financial support individuals give ;

- To train people to assume specific leadership roles (and to help them avoid burn-out as well as chart a “career path” to this role);
- To help people understand that being Jewish and Jewish learning is important to the individual and to the Jewish community;
- To help those already actively engaged in the Jewish community to develop and trust their own Jewish authenticity;
- To inspire individuals who are excited about Judaism;
- To create a network of individuals involved in leadership in the Jewish community.

The conflict between “involvement as an end in itself” and “training for substantive leadership” is a critical one which was mentioned. In other words, some programs foster participation in a very general level, such as serving on the board or a specific committee with now real attention to leadership.

One Federation director said, *“Not all of our ‘leadership training programs’ fit even the loose definition of this word. However, we use this phrase because it is term which people are likely to respond to.”*

Program Characteristics

- **Programs tend to focus on four general areas: the mission of the organization, leadership skills, issues related to the Jewish community at large, and Jewish context.**

Jewish content refers to both text teaching and making the Jewish context of an organization’s mission more explicit.

“We offer our leaders various learning opportunities on subjects such as Israel, Judaism and other “things Jewish” which we feel are essential for them to know. We have also begun to incorporate Jewish experiences into what we provide for our leaders-such as Sabbatonim or simply Shabbat dinners. What we are trying to do is teach people about Judaism, so they can assume positions of Jewish leadership and also help them to enjoy the experience.

- **There is a trend toward long-term Jewish education programs to provide a sustained, more intensive learning experience. (At the national level these programs include Clal and Wexner and at the local level there are programs such as Me’ah in Boston and Limod in Baltimore.)**
- **Some organizations offer various levels of training.**

“In the past we were criticized for ‘burning-out’ our potential leaders by giving them too much

to do to soon. We are thus constantly trying to balance “keeping these folks engaged with our organization and avoiding burnt-out. One method we have developed which helps to circumvent this is offering multiple levels of leadership training. We also try to help people design an appropriate ‘volunteer career-path ‘ with our organization”.

- **It is very uncommon for professional and lay leaders to participate together in leadership development.**
- **Programs are generally free or of minimal cost to participants.**
- **Few, if any programs, have institutionalized mentoring or formal networking programs.**

Recruitment

- **National programs recruit locally, often relying on the local Federation.**

Some lay leaders do not want to participate in national organizations. In addition, because many lay leaders are ultimately recruited locally, the same people are being tapped again and again.

- **There is not a “path to leadership” for lay people. Therefore, when training is completed, there is not a systematic focus on placement.**
- **Lay people tend to be nurtured by professionals, not by other lay people. This contributes to the sense that a small net is cast to recruit and place lay people for leadership positions.**

Challenges

- **Faculty**-There is a shortage of faculty that can incorporate teaching both Jewish content, leadership and work effectively with adults. Thus many programs have a “fly in” model, where individual instructors teach specific components of a program. It was uncommon for lay leaders to teach other lay leaders.
- **Money**-“Everyone talks about wanting to invest in leadership training, but it is one of the first items to be cut from the budget each year.”
- **Time**-Lay leaders have limited time to devote to volunteer commitments including training programs.
- **Women** are under represented in training programs.
- **Rewards**-There needs to be a consciousness to nurture and reward lay leaders. This is considered vital to developing a cadre of future lay-leaders.

Afterward

During 1998, the Mandel Foundation-New York (formerly, Council for Initiatives in Jewish Education) commissioned a number of papers to scan the field of leadership preparation and development. Experts prepared papers that reviewed trends in leadership development in four broad fields: Educational Leadership in Schools; Leadership Development in the For-Profit Business Sector, Leadership Preparation for Nonprofit Management, and Lay Leadership and Board Development. The purpose of this afterward is to highlight and summarize some of the lessons learned from these four scans as they pertain to the findings from the review of leadership development programs in the Jewish Community.

Professional Leadership Development

Types of Programs

- The scans revealed that all fields are trying to make clear and meaningful distinctions between programs for novices and those geared toward more advanced leaders. In school leadership, for example, novices usually acquire a M. Ed while more senior personnel study for the doctorate degree. In the non-profit and business sectors, programs are directed toward top executive leaders, executive and professional leaders, and aspiring managers.
- Continuous professional development opportunities follow each of these levels of leadership preparation. There are abundant and widely varied types of professional development programs sponsored by numerous organizations. This culture of continuous education allows for regular feedback, reinforcement of program skills learned, and long-term development plans. "The most successful programs do not end" (Bacon, pg. 16).
- A very wide array of organizations offer leadership development programs. Although many sectors rely heavily on universities for the training of its professional leaders, professional associations and independent institutions are very active in the leadership development field. A recent trend is for larger organizations and corporations to provide their own in-house leadership development programs and curricula.

Goals

- Programs are clearly geared toward developing the most capable leaders for the field.
- Programs are more and more rooted in the uniqueness of their 'sector', asking themselves, "what is the 'core focus' of this sector?" and "what is unique about the sector as compared to other areas?" Therefore, non-profit leadership development does not just follow the business sector, nor does educational leadership follow the non-profit sector. Each sector is

developing its 'brand' of leadership development to meet the unique needs of the field.

- Program goals are linked to evaluative standards. In many cases, these standards are externally developed and imposed. Thus, for example, the business sector leader should show improved organizational performance (larger profits) while in education, new standards and a corresponding test developed by Educational Testing Service are influencing the curricula for school leadership development programs.

Program Characteristics

- Programs are trying to get away from a "smorgasbord" approach. "Programs are designed to maximize learning by sequencing and interrelating courses, imbedding reflection about clinical experience in the discourse" (Milstein, p.4).
- There is an emphasis on experiential learning. This often involves field work, problem based learning and applications. This emphasis supports the view that leaders "need opportunities to advance their knowledge and skills in specific contexts" (Young, p. 8).
- Many programs are moving toward a cohort approach to develop a strong, supportive learning community. Students begin a program at only one point in a year and study together in a cohort until the completion of the program.
- Partnerships are becoming an integral part of many programs. In the non-profit sector, for example, there are closer linkages between universities and nonprofit organizations and associations. Educational leadership programs establish partnerships with school systems. In addition to providing faculty, field sites and curricula input, these partnerships establish an ongoing mechanism for feedback and evaluation of the graduates and a means for placement and recruitment. In the business sector, successful programs are linking their curricula to the organizational strategy and culture of its clientele. Practitioner-scholars play an important role in these partnerships.

Recruitment

- Programs in educational leadership are putting into place active mechanisms for the identification and recruitment of candidates to raise the level of the candidates, expand admissions criteria, and cast a broader net. The field is asked to identify exceptional candidates to recruit to programs.

Lay Leadership Development

The scan in this area focused mainly on board development. The paper mentioned that few boards have institutionalized the practice of board development, most boards do not invest board and staff time in leadership training, and few expenditures are allocated to these activities. Recently, however, more attention is being paid to board development, mirroring the recognition of the importance of the role of the board in reaching institutional effectiveness.

Types of Programs

- A wide variety of bodies offer lay leadership development programs: national organizations serving their specific mission areas (e.g., American Symphony Orchestra League, Special Olympics International), state nonprofit associations, consulting firms, and dedicated organizations such as national School Boards Association, National Center for Nonprofit Boards.
- Programs should be tailored to the specific and unique mission of each organization.
- Recent programs are offering leadership development for professionals and their board members together.

Goals

- Board development programs usually focus on board functioning and governance issues that can increase the effectiveness of the nonprofit organization because of the “growing sense that there is a correlation between the effectiveness of a nonprofit organization and the performance of its board” (Axelrod, p. 9).
- Leadership programs aim to instill the commitment in lay leaders to periodically review their performance, learn from mistakes and regularly invest in their continuing education needs.

Characteristics

- Effective board training should be viewed as a continuing process. “It is most successful when it is approached in an incremental fashion” (Axelrod , p.10).
- Programs benefit by dedicated board and institutional leaders “who can become either ‘product champions’ of board development to their colleagues, or agents of change in instituting effective governance practices” (Axelrod, p.10).
- Executive directors are highly involved in lay leadership development activities.

Summary

Recruitment

- “Most individuals become board members because they believe in the cause and want to be effective, they seldom receive sufficient orientation and continuing education to understand their roles and fulfil their responsibilities” (Axelrod, p.4).

LIST OF SCAN PAPERS

Scan of Programs: Educational Leadership - Professor Mike Milstein, University of New Mexico

Nonprofit Management Studies in the United States: The State of the Art - Professor Dennis Young, Case Western Reserve University

Leadership Scan for Business - Dr. Terry Bacon, Lore International

Current Trends, Best Practices, and Future Directions in Board Development - Dr. Nancy Axelrod, Founding Chief Executive and Former President, national Center for Nonprofit Boards

Summary

Final Interview List		
<i>Organization</i>		
American Jewish Committee		
Atlanta Federation		
Baltimore Federation		
Baltimore Hebrew University		
Boston Federation (2) [see note]		
Boston Hebrew College		
Brandeis		
Brandeis Bardin		
CAJE		
CJF		
CLAL		
Cleveland College		
Hadassah		
Hillel		
HUC – School of Communal Services		
JCCA		
JESNA		
Jewish Funders Network		
JTS (2)		
L'Atid		
Los Angeles, BJE		
Milwaukee Federation		
National UJA		
New Israel Fund		
NY UJA/Federation (2)		
Philadelphia Federation		
Philadelphia Auerbach CAJE		
Rabbinical Assembly		
Ramah		
Rhea Hirsch (HUC)		
UAHC (3)		
United Synagogue (2)		
University of Judaism		
Wexner		
Wexner Heritage		
Yeshiva University (REITS)		
Note:		
<i>Parenthesis indicate the number of people interviewed within the organization, if more than one person was interviewed. Multiple interviews were conducted at certain organizations in order to speak with people who ran different leadership programs within the same organization.</i>		

MANDEL FOUNDATION

MEMO

January 6, 1999

To: All

From: Barry Holtz

Re: The Professional Development "Policy Brief"

Enclosed you will find the latest (June 1998) version of the Professional Development "Policy Brief." This document was originally conceived as a follow-up and parallel document to the original CIJE Policy Brief on the Background and Training of Jewish Educators. The original Policy Brief made the case that given our research findings about teachers in the three communities, there was a need for serious professional development of those teachers. In the years following that publication we have learned a great deal about the current conception of Policy Brief in the world of general education. Our consultants, in particular Sharon, Deborah and Anna, are recognized experts in this field. Moreover, TEI has been an ongoing learning experience for all of us about what should and could be done in this field.

The new Policy Brief was envisioned to be an argument for *a certain approach* to professional development for Jewish teachers, professional development that differs from what usually goes by that name in Jewish education today. It was meant to highlight the case for this particular kind of professional development by doing three things: a) showing what the literature in general education says about good professional development; b) presenting the results of a new research project done by our team which looked at professional development in five Jewish communities in the United States; c) making specific recommendations for what communities could do.

The current draft is close to completion and was presented at the June meeting of the Professors Group. Within that group there was a good deal of positive reaction to the draft and a number of suggestions for improving the work, the main one being the idea that the more specifically *Jewish* elements of the situation (and our suggestions) be emphasized.

Making such improvements would not be difficult, but the Policy Brief has raised other questions, the main ones being what is the role of such a document given the current focus of the Mandel Foundation? Originally the Policy Brief was intended as a call to action and a resource for communities wishing to institute professional development. It

was part of CIJE's "catalyst for community change" agenda. At this point the Foundation has moved in a different direction.

In addition the question of *audience* is involved here: Who is this document for? Lay leaders? Education professionals? The answer to that question might influence the level of detail required in such a document. Graduates of TEI, however, whose job it is to advocate for professional development in *their* communities, might find such a Policy Brief of use. But wouldn't they want something more detailed about the *practices* of professional development? In addition, to create a Policy Brief like our earlier one would involve serious design and production costs—would that be worth it when we are not clear of the audience?

Another interesting issue with the Policy Brief was our (here I will say "my") concern about advocating a position on professional development *in the name of the organization*. For example, I believe that an important element of *Jewish* professional development is the personal, religious growth of teachers—the kind of work that I was involved in with the old Melton Teacher Retreat Program. But I felt uncomfortable advocating for such a view in the name of our organization. Less dramatic examples might also include the view we have about the nature of teaching and learning itself, as espoused in these pages, etc.

Given the points above (the changing situation of the organization, the question of audience, the costs of producing a Policy Brief like our earlier one, and the matter of speaking in some kind of official "voice"), I have come to feel that the best route is to rewrite the current piece in the form of an article, with authorship shared by the various contributors who have worked on this—Adam, Ellen, Gail, Bill Robinson and me. This would require a certain amount of work, but it's certainly a reasonable project to undertake. The sections that report on current professional development opportunities could remain fairly close to what they are now. It's even possible that this document should become two articles—one reporting on what is going on; the other making recommendations for action along certain lines. Finally, we might want to consider a more ambitious project—an edited book that would take on professional development and give a good deal of specific advice for how to do it. Such a book would also include the materials we've produced to accompany our videotapes.

DRAFT

POLICY BRIEF: THE PROFESSIONAL DEVELOPMENT OF TEACHERS FOR JEWISH SCHOOLS

I. Introduction

In its efforts to improve the quality of Jewish education in North America CIJE launched a study of teachers in three Jewish communities. The study showed that teachers in Jewish day schools, supplementary schools and preschools, though highly motivated and serious about their work, were underprepared for their jobs, both in their Judaic preparation and in their educational background and training.

Since the preparation and educational background of teachers are among the most important factors in influencing teacher effectiveness, these findings indicate a crucial area in need of dramatic improvement. In what way can Jewish education respond to this crisis? How can we improve the quality of teaching in Jewish schools? An obvious answer is to recruit teachers with richer Jewish backgrounds and to find ways to place prospective teachers in strong preparation programs. But both of these responses are long-term solutions to an immediate crisis. Moreover, given the part-time nature of field—particularly in supplementary schools—such a change in personnel is not likely to happen without major innovations in school and staffing structures. In addition, even if it were desirable, it is impractical to imagine replacing the entire population of those teachers who have inadequate preparation, given the vast numbers that would be involved.

Along with imagining better plans for recruiting talented people into the field of Jewish teaching and together with efforts to improve existing teacher preparation

programs and create new ones, the Jewish community in North American must ask itself: *What can be done rapidly and effectively to improve the current quality of teaching, especially given the expressed desire of teachers today to stay in the field and their high degree of commitment to Jewish education?*

It is clear that we must work with the population of teachers now in the field. Ongoing professional development for teachers--in-service education-- must be at the heart of any effort to change the face of contemporary Jewish education. We have learned from general education that professional development is important even for teachers with excellent background and preparation. The case of Jewish education calls out even more dramatically for the continuing education and training of teachers.

In this Policy Brief we shall first describe the latest thinking about professional development from the world of general education. We will then report on new research about the nature and kinds of the professional development currently being offered in a number of Jewish communities. We will compare the current efforts in Jewish education with the state-of-the-art in the field to see our strengths and weaknesses. Finally, we will propose approaches to professional development that could have an important impact on how teachers teach and consequently how children experience their Jewish education.

II. Professional Development for Teachers: Why New Approaches are Needed

Until recently the dominant approach to professional development for teachers, seen both in general and Jewish education, has taken the form of one-shot workshops, or at best, short-term passive activities, with limited follow-up. The content of such in-service workshops was built upon a “one size fits all” approach—the idea that

professional development strategies are applicable to all participants regardless of the educational setting in which the teacher worked, the age of the student in the teacher's class, or the subject matter to be taught and learned.

Such strategies are based on a "transmission of information" model of professional development: It is assumed that each teacher would "learn" the latest new techniques and bring them back to her/his own classroom, making whatever "adjustments" might be necessary. Teachers in this conception are treated as passive recipients of techniques and practices, rather than "intelligent, inquiring individuals with legitimate expertise and important experience," as one study has put it.¹ This approach to professional development grew out of a particular view of teaching that emphasized teachers transmitting information and children listening and remembering.

In recent years, however, a new approach to the professional development of teachers has come to influence the field of education. This approach to professional development holds a view of teaching that moves away from a more traditional image of teaching as "telling and learning as listening" to a vision of "learning as telling, teaching as listening."

This way of thinking about teaching requires a different understanding about what teachers need to know and be able to do. It asks us therefore to think differently about the kind of professional development offered to teachers. "One size fits all," approaches to teaching that are said to be appropriate to all ages and subjects are unlikely to succeed. In the same way, "one size fits all" professional development programs will not succeed in improving teaching in the classroom.

Instead we will need to create a variety of new strategies to improve and deepen teachers' learning. We will need to encourage teachers to experiment and we will need to help them through the real struggles that accompany any effort at change.

III. Professional Development for Teachers: The State of the Art

What does "good" professional development for teachers look like? A number of different elements have been identified by current research as characteristic of high quality professional development programs. We will point out four that have been shown to be most central.

First, *Good professional development is connected to knowledge of the content that is being taught:* Teachers need to develop sophisticated understandings of the subjects they are teaching. By "sophisticated" we mean having the ability to understand the key concepts and skills of any particular subject and at the same time understanding the best ways to present them to students or help students discover these central ideas on their own. It means knowing the subject matter, but also understanding how that subject is understood (or misunderstood!) by children. What are the likely confusions that students will have? What are the best ways to overcome them? What activities in a classroom are most likely to encourage and inspire students to learn the subject matter? All of these questions indicate the kind of understanding of subject matter that teachers need to attain.

Second, *Good professional development has coherence and focus:* Because the subject matter content of teaching is so central to professional development, good programs are not based on "generic" teaching skills meant for a wide range of participants, but are "targeted," that is, aimed at a specific audience of teachers—either

by the subject matter being taught or the grade of the students who are the potential learners.

Third. *Good professional development has a comprehensive plan, sustained over time.* Professional development requires a well thought-out plan, both for individual teachers and for the educational institution (or system) as a whole. Sessions must follow a meaningful educational pattern, building upon one another in a sequenced manner. In addition, professional development requires an ongoing cumulative effect that can best be effected over time. Even though a “one-shot workshop” may be able to transmit some elementary facts or practices, real change in teaching requires sustained, coherent learning.

Fourth, *Good professional development is related to practice:* Teachers need to have opportunities to take what they have learned about their teaching subjects and reflect with others on how that subject matter actually works in the classroom. Such reflection must take place within the professional development sessions no matter where they take place. But in particular the research on professional development in general education has found that teachers have been best able to make significant changes in their teaching practices in the context of “professional learning communities.” In the same way that doctors get to present cases to their colleagues and discuss the best approaches to real-life situations in their field, teachers too must have the chance to work with peers to improve their practices.

In this approach, instead of experts transmitting skills to teachers, one finds *groups of teachers studying the teaching and learning processes together.* Teachers have opportunities to voice and share successes, doubts and frustrations. They learn to raise

concerns and critical questions about their own teaching and about their colleagues' teaching.

D. What Does Professional Development Currently Look Like in Jewish Education?

As a starting point towards changing practice, it is essential to ascertain what opportunities currently exist for the professional development of teachers in Jewish schools. Five communities, partners with the CIJE in exploring new approaches to professional development, participated in a survey of existing opportunities: Atlanta, Baltimore, Cleveland, Hartford, and Milwaukee. The communities were selected to represent an array of structures and programs in Jewish education. However, because participation was voluntary, and because these communities were engaged in exploring new approaches with CIJE, the characteristics of programs in these locations may be more favorable than those in North America as a whole.

The survey took place in 1996. It targeted two groups of providers: central agencies for Jewish education, and synagogue supplementary schools. The survey thus reveals the entire spectrum of professional development programs for supplementary teachers, and many of the programs available to day school and pre-school teachers, insofar as such programs are offered by the central agencies.

All central agencies and synagogue schools in the five communities responded to the survey, and a total of 173 separate programs were tallied across the five communities. Of these, 141 were offered by the central agencies and 32 were sponsored by synagogue schools. A "program" could entail a wide variety of settings and activities, ranging from single workshops to mini-courses, retreats, and so on. Two types of professional development were not included in the survey. One was the all-day or multi-day

conference that educators often attend, such as the annual convention of the Coalition for the Advancement of Jewish Education (CAJE), or local conferences patterned after CAJE. There were 11 such local conferences, most of which lasted one day. These were highly diverse in their content and thus did not lend themselves to the survey categories, but may be kept in mind as additional opportunities for professional development.

Another type of opportunity that does not appear in our survey results consists of courses offered at local colleges or institutions of higher Jewish learning. (See Box 1 for an example of such a course.) Programs affiliated with institutions of higher learning were included only if they were designed with central agency staff for the in-service education of teachers. If they were simply available for any member of the public, we did not include them in our purview. Nonetheless they may be important vehicles for improving teachers' knowledge.

Focus on Jewish Content

To what extent did professional development programs offered in the five communities emphasize Jewish content? We found an emphasis on Jewish content in two types of programs. In one type, a particular Jewish subject matter is the focus of the program. Box 2 contains an example of this type of program. In "The Akedah," the main emphasis was on participants' grappling with the difficult subject matter of the binding of Isaac. Another type of program that emphasized Jewish content, such as that illustrated in Box 3, centered on teaching a specific Jewish subject matter. Although the Jewish content itself was not the main point of "Hebrew Instructional Issues," the connection to content was inherent in the program.

Many programs lacked a deep connection to Jewish subject matter. These tended to focus on specific pedagogical or leadership strategies, in which the subject matter was assumed to be generic, or in which the Jewish content of the potential subject matter was not addressed in the program. Box 4, “How to Use Stories in Your Teaching,” provides an example of a program that did not focus on Jewish content. Overall, 23 programs, or 13%, focused on Jewish content per se, and another 32 programs (18%) focused on methods for teaching a particular Jewish content. The remaining programs (69%) centered on issues of pedagogy, leadership, or other topics without articulating a concrete connection to Jewish subject matter. Chart 1 displays these percentages.

Sustained and Coherent Programs

As is typical in general education, our survey suggested that opportunities for professional development in Jewish education tend to be one-shot workshops that meet for relatively few hours and are not part of a long-term, coherent plan for teachers' professional growth. “How to Use Stories in Your Teaching” (Box 4) is typical of a one-shot workshop. Chart 2 shows that 63 programs, or 37%, met for only one session, and another 49% (85 programs) met for between two and five sessions. Only 12% of programs met for six or more sessions. Similarly, 24% of the programs spent a total of two hours or less addressing a coherent theme, and only 11 programs (6%) focused on a theme for 20 hours or more (see Chart 3).

Another aspect of coherence concerns whether the program is part of a more comprehensive plan. “Hebrew Instructional Issues” (Box 3) is an instance of a program that plays a role in a broad, long-term approach to renewal and growth for a synagogue supplementary school. Overall, only 27 programs (16%) were part of such a

comprehensive plan, while 146 programs (84%) lacked such articulation to a wider context.

Programs Geared towards a Specific Audience

Another problem with many workshops, besides their limited duration, is that they tend to assume all participants have the same backgrounds and needs, when in fact Jewish educators vary greatly in their training, past experiences, and teaching roles. Almost half of the programs we counted (47%) were not designed for a specific audience. The others were created with a variety of particular consumers in mind, as illustrated in Chart 4. Among the targeted programs, the largest category is "Institutional Setting," which often referred to a particular school, but a workshop geared towards the entire staff of a single school is usually not focused enough to meet the needs of its diverse audience.

Opportunities to Reflect on Practice

None of the examples we have offered so far provided teachers with a formal opportunity to take what they have learned, develop a classroom application, and reflect upon it with other participants. Indeed, very few programs offered such an opportunity. Of course, nothing prevented teachers from trying out new ideas they may have picked up. But that is not the same as creating a formal mechanism that encourages teachers to reflect on their work. Overall, 80% of the programs lacked such mechanisms. Of those that did, 14 programs (8%) included a coaching or mentoring component, 17 programs (10%) had a formal process of classroom experimentation and reporting back to the professional development group, and 11 programs (6%) established networks of educators that offered formal opportunities for reflection. Only two of the programs were designed for teams of participants from different institutions.

Typical versus Exceptional Programs

Our survey showed that attributes of high quality professional development are lacking in many of the programs available for teachers. The picture becomes sharper when we consider how many of the programs exhibited all of the characteristics recommended by the research on teacher professional development. As Chart 5 reveals, only 4 programs (2%) across the five communities had four key characteristics, which we defined as: designed to contribute to specific content knowledge; a series of 6 or more sessions on a coherent theme; targeted for a specific audience; and designed to help educators reflect on their practice. Fourteen programs (8%) embodied three of these characteristics, 37 (21%) included two, 78 programs (45%) displayed only one of the key characteristics and 40 programs (23%) had none.

What sort of exemplary program incorporated all four of these elements? Box 5 provides an example. “Machon L'Morim: Bereshit” was a long-term, focused, and reflective program that engaged deeply with Jewish content. An evaluation provided evidence to support participants' reports of gains in their Jewish knowledge, increases in the richness of their Jewish teaching, and changes in the cultures of their schools towards a more open, change-oriented approach to teaching.

BOXES THAT GET INSERTED INTO PAGES ABOVE, AS INDICATED:

Box 1. A Course at an Institution of Higher Learning

"Introduction to Modern Hebrew Literature"

A local Jewish college offered this course as part of its graduate program. The course offers students the opportunity to become familiar with Modern Hebrew literature in translation. Poetry, essays, and fiction were read and discussed. It is a semester long course, meeting once a week for two and a half hours. The course is not designed to affect teaching in local Jewish classrooms, though Jewish educators enrolled in a Jewish education degree program may have attended the class. Courses such as this one are not included in our survey results.

Box 2. An Emphasis on Jewish Content

"The Akedah"

This program, offered by the local central agency, was open to all teachers in Jewish schools. A professor of Jewish studies at the local university taught this program. He engaged teachers in an in-depth study of the text, and then used the Akedah (the Binding of Isaac, Genesis 22) to explore ways of teaching Jewish texts to younger students. The program met four times for a total of ten hours. Even though the course occurred over a period of several weeks, it did not incorporate follow-up efforts to support or reflect on teachers' efforts to improve their teaching of Jewish texts in the classroom.

Box 3. An Emphasis on Instruction in a Specific Content Area

"Hebrew Instructional Issues"

This program was offered by a central agency for a specific congregation, which was reviewing and revising its Hebrew curriculum. The program began by exploring general models of language acquisition and, then, considered ways of applying these models to Hebrew learning. Following this, issues of faith development and spirituality were considered as among the ways one may choose to teach Hebrew acquisition. This program met four times for a total of ten hours. It was designed as part of a curriculum redesign project for this synagogue supplementary school. Separate but related programs were offered for all teachers in this congregational school to strengthen their Hebrew reading skills and to involve them in the redesign of the curriculum.

Box 4. A Program that Did Not Emphasize Jewish Content

"How to Use Stories in Your Teaching"

This central agency program was designed to help supplementary school teachers integrate storytelling into their classrooms by teaching them how to write a lesson plan that includes stories, exploring the role of storytelling in the curriculum, helping them to find and choose appropriate Jewish stories, and instructing them in the art of storytelling through modeling and discussion. The program met once for two hours on a Sunday afternoon.

In this type of program, Judaic subject matter is not addressed per se, but only noted as an example of how the skills under discussion might be applied. The practice of Jewish storytelling was not presented as unique or different than secular storytelling.

Box 5. An Exemplary Program

"Machon L'Morim: Bereshit"

This program, sponsored by a private foundation, was designed to improve teaching in Jewish early childhood education and to enhance early childhood centers as supportive contexts for teaching and learning. Twenty-six educators from five Jewish pre-schools participated in the program, which lasted for two years. In the year of our survey, the program met weekly for 24 weeks, for a total of 48 hours. Participants attended as pre-school teams, and each team included the pre-school director.

Machon L'Morim: Bereshit constituted a learning community. Participants studied Jewish texts and rituals, and focused on integrating this content with their knowledge of child development to design new approaches to bringing Jewish content to their pre-school children. In addition to the teaching faculty, the program brought in "coaches" who met weekly with each school's team to discuss what participants had learned as well as attempts to bring new insights to their classrooms. The program provided many opportunities to try out new practices and discuss their outcomes in small groups.

V. What Policies Should Be Introduced Into Jewish Education and How?

The Four Principles

In our view there is no reason why the principles of good professional development evidenced in best of contemporary general education cannot be introduced into Jewish education today. In some of the programs studied in the research described above we are able to see elements of this approach already being put into action. But, unfortunately, far too many examples of professional development in Jewish education have not caught up with the latest thinking in general education. The four dimensions of good professional development must be at the heart of an effort to improve teaching in Jewish education:

1. Subject matter content
2. Coherent, targeted professional development sessions
3. Comprehensive plans sustained over time
4. Direct relationship to teaching practice

Activities for Teachers

Within such programs there are many activities that teachers can engage in that will help improve their teaching practice. These include: the creation of informal study groups about Jewish content and reading groups about educational theory and practice both within and outside of school; focused investigations of existing curriculum materials with an eye toward analyzing the way the materials might be used in the classroom; the preparation and discussion of “cases” of teaching practice; mentoring of less experienced teachers by more experienced teachers; pairing of teachers with similar experience to observe and discuss one another's teaching; video-taping lessons for analysis and

discussion; and many other approaches that are documented in the educational literature of general and Jewish education.

Context Matters

The four principles outlined above refer to the activities and sessions themselves, but research in general education also highlights a crucial additional dimension for successful professional development—the **conditions** needed in educational institutions that will allow professional development to flourish and be effective: *Good professional development requires a supportive institutional context*. Professional development, according to this view, is an essential and indispensable process that will need to be integrated into the life of educational institutions, woven into the very fabric of teachers' work, and not seen as a frill that can be cut in difficult financial times or because of overprogrammed schedules. Institutional support includes incentives such as stipends and credit for ongoing professional growth and variety of conditions including the following:

A. *"Critical Collegueship"*: Teachers need opportunities to work with colleagues, both in their school building and beyond it. Research indicates that teachers who have made effective changes in their practice belong to active professional communities that not only support and encourage new practice but also enable teachers to engage in constructive criticism. A logical place to develop such collegueship is within the context of the school in which one is teaching. Here, teachers can develop ways of working and talking together. But, the research argues, we also need ways to create community for teachers beyond their own schools so that teachers of the same subject matters and teachers of the same age children can learn together.

B. Time: Teachers need time to become involved in the sometimes-protracted process of changing roles and practice. To attain time and mental space, professional development must be redefined as a central part of teaching. It can no longer be an “add-on,” tacked on to the school day, week or year. It must be woven into teachers' daily work. Schools with serious commitment to professional development for their teachers have experimented with a number of different strategies for finding regular time including a weekly extended lunch time of two hours; pre-school meetings; and starting “regular classes” at noon once a week.

C. Leadership: Teachers need the support and advice of an educational leader who understands issues of teaching and learning and what it takes to change teachers' roles and practice in their classrooms and in the school. Research indicates that only in settings where principals are involved in professional development does teaching practice really change. At the most straightforward level, educational leaders need to value this enterprise; initiate, plan, develop and evaluate initiatives in their own institutions; work with their teachers to develop appropriate individual professional development plans; and work to advocate for particular programs that might best be offered across institutions or outside of the school, such as those that extend and deepen teachers' subject matter knowledge.

What will educating institutions have to do to help professional development become central?

[The next points need filling in:]

First, they will need to devote time (budget issues here of course, also structural issues-freeing teachers up);

Second, money-for scholarships; for Israel; for video taping etc.

Third, use available resources-universities; BJE's, denominational movements training institutions (also via distance learning). But need to press them to do good professional development, not one shot workshops, etc.

Fourth, advocacy (role of principal)

Fifth, the literature from general education emphasizes the acquisition of skills and knowledge. Jewish education also has to deal with the spiritual/religious side of professional development. Need to explain this; Melton teacher retreat program???

Finally, this effort will require people who can design and implement professional development sessions for teachers. The Teacher Educator Institute (TEI), CIJE's own program for preparing such leaders has attempted to create a model of professional development based on the best of contemporary educational thought and practice. In the future we envision local communities developing their own versions of TEI or sending representatives from their schools and central agencies to a national center for Jewish teacher education in which the leaders of professional development can be prepared and nurtured.

ADD BOX 6 HERE: THE CIJE TEACHER EDUCATION INSTITUTE (TEI)

ADD CHARTS HERE:

Chart 1

Is the learning opportunity designed to contribute to the Judaic content knowledge of the educator?

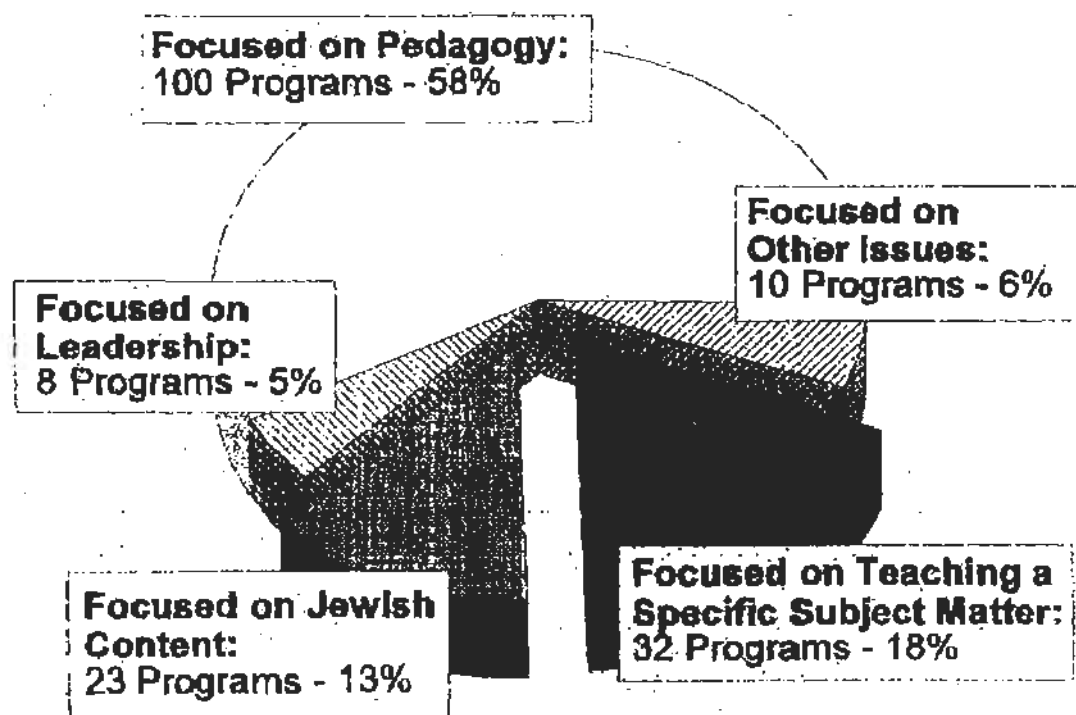


Chart 2

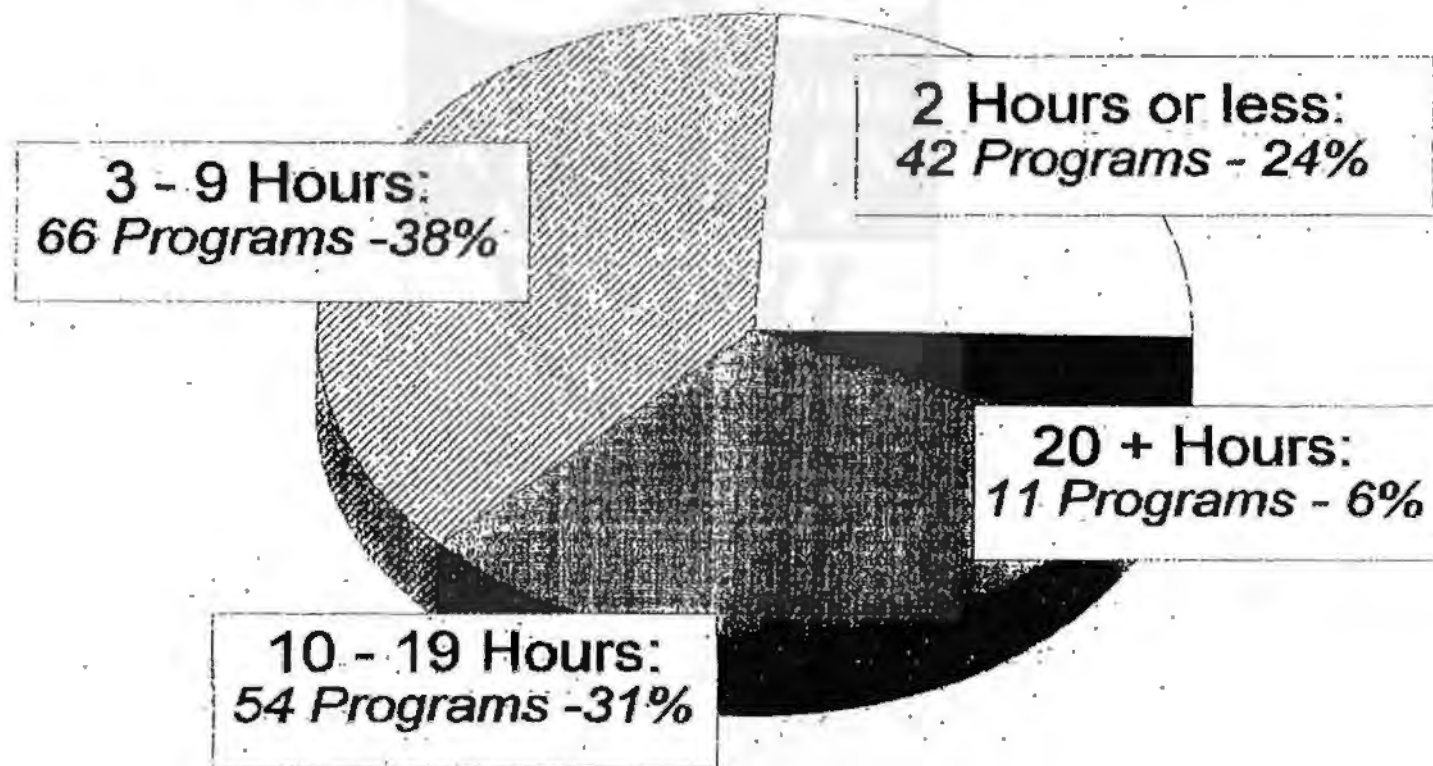
Is the learning opportunity a series of sessions designed to address a coherent theme rather than a "one-shot" workshop?

	# of programs	% of programs
1 session	63	37%
2 - 5 sessions	85	49%
6 - 9 sessions	12	7%
10 - 19 sessions	8	5%
20 or more sessions	4	2%
TOTAL	172	100%

Note: One program, a seminar in Israel, is excluded from this classification.

Chart 3

**TOTAL HOURS OF MEETINGS
ADDRESSING A COHERENT THEME**



Note: Percentages do not add to 100% due to rounding.

Chart 4

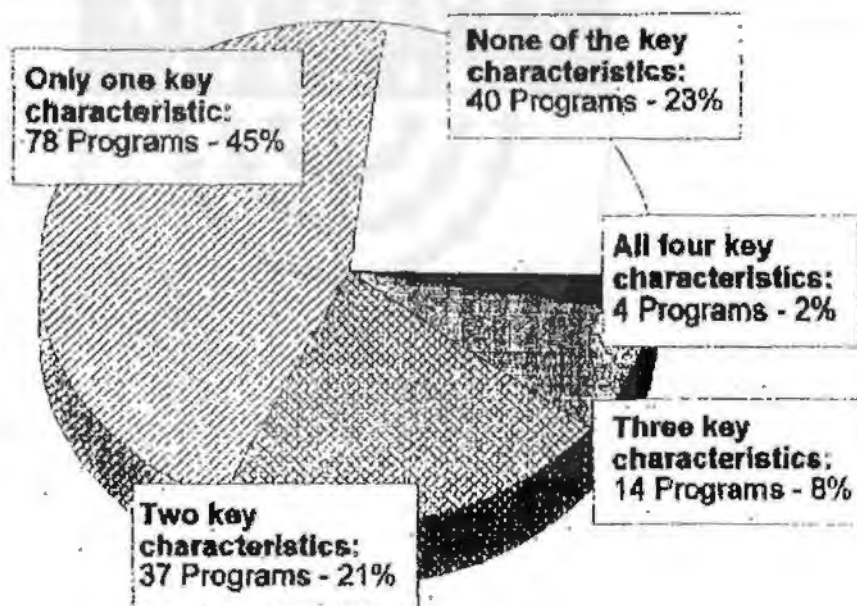
Is the learning opportunity designed for the professional development of a specific audience, as delineated below, rather than "one size fits all?"

Audience Defined By:	# of programs	% of programs
Institutional Setting	66	38%
School Affiliation	5	3%
Role of Educators	10	6%
Experience of Educators	11	6%
Formal Training of Educators	0	0%
Age of Students	28	16%
Not Designed For Any Specific Audience	82	47%

Notes: "Setting" refers to programs designed exclusively for educators in day schools, congregational schools, JCCs, or the central agency. Percentages do not add to 100% as some programs were designed for more than one audience

CHART 5

Does the learning opportunity have four key characteristics:
(1) designed to help educators reflect on their practice;
(2) designed for a specific audience;
(3) designed to contribute Judaic content knowledge; and
(4) a series of 6 or more sessions on a coherent theme?



Note: Programs offered by the central agency to a specific congregational school are considered to be designated for a specific audience.

This CIJE Policy Brief was prepared by: Gail Zaiman Dorph, Adam Gamoran, Ellen Goldring, Barry W. Holtz, and Bill Robinson.

NOTES

¹ D. Sparks and S. Loucks-Horsley, "Five Models of Staff Development for Teachers, Journal of Staff Development 10:4 (1989), p.50.

FOR FURTHER READING

In addition to the article above, the following may be of interest:

C. Goldenberg and R. Gallimore, "Changing Teaching takes More than a One-shot Workshop," *Educational Leadership* 49:3 (1991).

Harvard Education Newsletter 13:3, (May/June, 1997).

Barry W. Holtz, Gail Zaiman Dorph, Ellen B. Goldring, "Educational Leaders as Teacher Educators: The Teacher Educator Institute--A Case from Jewish Education" *Peabody Journal of Education* 72:2 (Fall, 1997).

Machon L'Morim: A Newsletter Spring, 1995 and Winter, 1997 issues (Baltimore, MD: Machon L'Morim)

G. Williamson McDiarmid, *Realizing New Learning for All Students: A Framework for Professional Development of Kentucky Teachers* (Michigan State University: National Center for Research On Teaching and Learning. 1994)

MEMO TO: Gail Dorph
FROM: Dan Pekarsky
RE: The Beit Rabban paper
DATE: January 17, 1999

Attached is an in-progress and still very incomplete draft of the Beit Rabban piece. As a guide to what you'll find there, let me make some preliminary comments. First, I intend this piece to offer a vivid example of a vision-driven educating institution, along with the kind of commentary or discussion that will make explicit a) what a vision is; b) what it means for an institution to be guided by or suffused with a vision; and c) how having such a vision or guiding idea facilitates identifying educational purposes, as well as designing and evaluating educational practices. In the course of the discussion, I think it important to bring out how the institution came into being and to discuss the challenges it has had to face along the way. Note also that I have tried to locate my treatment of vision-driven institutions in the context of some of the larger challenges of North American Jewry and in relation to the movement to use education as a vehicle of addressing these challenges.

Intention. Along with many of us, and in the spirit of "one picture is worth a thousand words", I have long sensed a need to have a cluster of good, but varied, examples of vision-driven educating institutions. The Dewey-school is a wonderful example, and within the Jewish world we've sometimes used examples from out of the Haredi world, e.g. in Heilman's **DEFENDERS OF THE FAITH**. But we also need powerful Jewish examples that speak to a community that takes Jewish tradition seriously but is also connected to the liberal values and ways of thinking associated with modernity. The enormous interest in Seymour's Ramah piece testifies to this need and to the powerful role that carefully crafted portraits like this can play; and I expect DM's Agnon piece to be a strong complement to that document. I am hoping that the Beit Rabban piece will contribute, in a complementary but different way, to this same literature.

Audience. At this point, I have a varied audience in mind for the piece. I'd like it to be accessible and useful to professional educators, various categories of lay-leaders, and to students in training to be educators or educational leaders. I hope it will function as a vivid example of what a vision-driven institution is and why it's important to strive to create such institutions; most importantly, it's a **kind of demonstration-proof** - proof that establishing such an institution is a possibility. **Accompanied by appropriate exercises and juxtaposed with, e.g., the image of an educated person informing the Agnon school**, the piece will, if successful, help to stimulate some fruitful thinking among these readers concerning their fundamental educational aspirations and their possible implications for practice.

The analysis. If successful, this analysis will not only give a rich example and account of a

¹In addition, in line with a suggestion Danny Marom offered some a couple months ago, it might be of interest to include some kind of a "meta-piece" that discusses some principles of and approaches to portraiture (with attention to some of the relevant literature on this kind of work); I find this an interesting assignment, but one which I want to defer until I have made more progress at a first-order level.

vision that is grounded in Jewish content and of an institution that is informed by this vision; it will also demonstrate the importance of creating more vision-driven institutions if we are to make significant progress in Jewish education. The analysis will rely heavily on the five levels of analysis that Seymour has articulated, as well as on the Commonplaces. Though vision is emphasized heavily at the beginning, it tends to move back and forth among the 5 levels in a way that seems natural -- and, I hope, engaging -- within the format I've adopted (see below).

Format. The format I've adopted (at least for now) is a kind of cross between Halkin's *LETTERS TO AN AMERICAN JEWISH FRIEND* and Skinner's *WALDEN II*. I don't know if you'll recall *WALDEN II* from many years back, but it represents Skinner's attempt to describe an educational/communal utopia modeled on his ideas using the following format: a number of individuals with different temperaments and outlooks come as a group to visit this utopian community, and the book develops as a mix between what they witness, their conversations with the leader (the Skinner-figure), and their conversations among themselves. In this way, the character and rationale for the community emerges, as do critiques of it.

My approach has been to imagine a correspondence between myself and a congregational school principal (modeled on someone I actually know) concerning the challenges of American Jewry, the responsibility placed on education, and what is necessary if education is have a fighting chance of rising to its challenges. In the course of our correspondence, I refer to the insufficiency of money to solve our problems and launch into some comments about the need for vision-driven institutions. She asks me for example, and, after pointing to some outside the Jewish world, I tell her about my upcoming vision to Beit Rabban, an institution which, I've heard tell, is vision-driven. The remainder of my letters (at least to date) follow my observations and reactions to Beit Rabban, as well as the conversations I have with the director, Devora Steinmetz, concerning its guiding vision, the way it's expressed in the life of the school, challenges, objections, etc.

I've chosen this format for two reasons: one of them, the more pragmatic one, is that, after a period of struggling with how to get going with the writing, it seems to have freed me up to get ideas down on paper, and the truth is that I'm finding the writing a lot of fun at this point. The second reason has to do with my hope that the product will be accessible and engaging to a wide audience. If it turns out that the format in question is unlikely to achieve this result in a useful way, I still feel that it's been useful at this stage because of its ability to help me get some of the principal ideas down on paper. In any case, at this point I feel sufficiently at home with the material and into the project to develop its major themes in a more conventional, or frontal, way, if this seems wisest.

By the way, I'm aware that some of the letters are way too long at this point. I'll need to break the text up more frequently (and perhaps to include actual letters from the person I'm writing to, rather than just my paraphrases of what she wrote me).

Where I now am. As I said at the outset, though I've done a lot of observing, talking (with Devora), and thinking, the writing is still at a preliminary stage. There might be better examples for some of the points I'm making, and some important dimensions of the school have yet to emerge -- for example, its Text-grounded understanding of and seriousness about community, its approach to moral growth, and how these elements connect with the school's commitment to autonomy.

Nonetheless, I feel like I'm making progress and am "in the thick of it." I showed it to Devora last week and she seemed very enthusiastic: while she had some suggestions, overall, she felt that the content was on target, and she liked the format I had adopted a lot.

That's it for now. I'll look forward to hearing your own and other responses. In the meantime, I will keep working on it.

BEIT RABBAN: A VISION-DRIVEN SCHOOL IN ACTION

INTRODUCTION

This paper is the outgrowth of two convictions: first, that significant improvement in Jewish educational practice and outcomes depends substantially on our developing educating institutions that are informed by powerful visions. The second conviction is that most people, including educators, do not have a vivid understanding of what a vision is and what a vision-driven institution; and if they do, they are often skeptical that we can realistically aspire to the development of such institutions in Jewish education (except perhaps in the Haredi world). For these reasons, we have felt that it is important to develop powerful portraits of vision-driven institutions, portraits that not only exhibit what a vision-driven institution is and can serve as demonstration-proofs that such institutions can come into being and flourish, but that also challenge those who encounter these portraits to struggle with basic questions concerning the aims of Jewish education and the relationship between these aims and educational practice.

Two significant documents have already emerged in response to similar concerns: Seymour Fox's study of the Ramah movement, "Vision at the Heart; and Daniel Marom's study of the Agnon School. The development of a third portrait that offers yet another vision of Jewish life and of a school modeled on such a vision is important, among other things, because in combination with the other portraits, it will allow the reader to encounter some interesting and challenging comparisons and contrasts. Beit Rabban, a Jewish Day School on the Upper West Side of Manhattan that features an ethos and practices that could be described as a cross between the Dewey School, the University of Chicago, and a Yeshiva, promises to offer an interesting contrast to the other two portraits pointed to above.

Two additional prefatory comments are in order. First, because the importance of developing vision-driven educational institutions is intimately connected with the difficult challenges faced by the organized Jewish community and current debates concerning how education can help us address these challenges, I attempt to locate the discussion of Beit Rabban in relation to some of these larger issues. Second, in an effort to make the paper more accessible to a non-academic audience and to give it a more conversational tone, I have chosen to develop it as a series of letters to a Jewish educational leader ("Pamela", the director of a Hebrew School in a big city) with whom I have been discussing some of the major challenges of Jewish education. As the reader will see, in response to her bewilderment at my suggesting the importance of vision-driven institutions, I am led to visit Beit Rabban, where I discuss its vision with the school's founder, Devora Steinmetz, and watch the vision in action. These observations and discussions are described in the letters to Pamela, along with responses to her questions and concerns.

NEW LETTERS TO AN AMERICAN JEWISH FRIEND – FROM ONE OF YOUR OWN!

Dear Pamela:

Greetings! It was great meeting you the other day at the conference of Jewish educational leaders. As I mentioned when we spoke, I was excited to hear about the efforts under way in your community and institution to improve the quality of Jewish education. The amount of money now available is hard to believe, and it is being put to worthy uses: upgrading the profession by creating more meaningful positions and increasing salaries; providing resources for meaningful inservice education; and helping to cover the costs Israel experiences and summer camping -- all these developments are wonderfully exciting. And as you well know, what is going on in your community is happening elsewhere as well.

We agreed, as I recall, that these changes could not come at a better time! But this agreement also gave rise to our first disagreement. As I recall (and not without some embarrassment), I reacted somewhat strongly when you tied these initiatives to rising inter-marriage rates and the "continuity-agenda". And as I thought about our conversation later on, I was concerned that it might have sounded like I am anti-continuity and untroubled by inter-faith marriages. Since this is far from the truth, I wanted to be sure to clarify my position.

To begin with "Jewish continuity" it is to my mind too simple to say "I'm for it!" without asking "What am I for when I say I'm for Jewish continuity? What kind of continuity is to be encouraged and for the sake of what should it be encouraged?" To my mind, not all forms of Jewish continuity are necessarily desirable: after all, all sorts of groups have an impulse to preserve themselves, and sometimes they do so in ways that are an affront to their ancestors and to humanity at large. It's true that, with an eye towards meeting this kind of concern, recently some have begun to speak not about "continuity" alone but about "meaningful Jewish community", by which I take it they mean a worthy kind of Jewish continuity. But here I find myself wondering: what is to count as "meaningful Jewish continuity"? And can we even begin to characterize it if our thinking is not informed by some positive conception of what Judaism is and why it's important? I am uncomfortable saying this, but it's my impression that many of the people who wave the continuity-flag are informed not by convictions concerning what Judaism is about and why its preservation is important, but by a kind of knee-jerk reaction to inter-faith marriage rates.

Not that I am untroubled by the rising rates of inter-faith marriage; but to my mind it is but a symptom of a much deeper problem -- namely, that Judaism has ceased to speak in compelling ways to so many among us; they have ceased to find their spiritual, intellectual, and moral needs met within the framework of Jewish life. Were rich participation in Jewish life

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found meaningful by contemporary Jews, inter-faith marriage rates would surely drop off very quickly.

Of course, the fact that contemporary Jews don't seem to find Judaism responsive to their deepest questions and needs might mean that Judaism is simply less powerful than are competing systems of ideas and spiritual practices. It may be that Judaism has little to offer contemporary Jews who are not prepared to leave modernity behind. While this hypothesis cannot be ruled out of bounds, I find it far from compelling. I say this not just because of a deep faith in the power of Jewish civilization and continuing awe in the face of its ability to claim the intellectual, moral, and emotional energies of Jews of all kinds across a multitude of cultural contexts and eras, but also because to infer a lack of power in Judaism based on widespread indifference to it would only begin to make sense if those who are indifferent to it knew what they were rejecting. And the truth is that most American Jews who look elsewhere or in any case seem marginal to Judaism have at best a superficial appreciation of what Judaism is and at worst serious misconceptions.

On what and on whom is blame to be put for this state-of-affairs? This is a difficult question to answer. It is, in typical American style, easy to put the blame on our educational institutions: "If only Jewish congregational schools were better, if only day school education had a different form, we would not be in the mess we're in...." But we are, or should be, well beyond the stage of scapegoating educational institutions for a larger cultural problem. Surely we need to recognize the fault of the larger Jewish community that has failed to support and fund adequate Jewish educational institutions; and surely we need to recognize that, however, good educational institutions are, they cannot take the place of appropriate experiences in the family and the culture at large; if we assign to them the job of counteracting the outlook acquired in the family and in the general culture, we are setting them up for failure and ourselves for disappointment.

And yet, as we said in our conversations, educating institutions are not blameless either. Along with families and the organized Jewish community, they too need to shoulder part of the responsibility for our present predicament. Or, more to the point, they too need to shoulder some responsibility for remedying this predicament; and this brings us back to our conversation and to what prompted our second disagreement.

The two of us agreed that it was naive to think that educating institutions were sufficient to transform American Jewish life, but we also agreed that they were critical ingredients in any approach to the problem. And we also agreed on the importance of dramatically enhancing the qualifications of those now asked to lead and teach in educating institutions or to do educational planning for the larger community, as well as on the importance of informal education. But while you seemed to feel that such improvements would suffice to make Jewish education as effective as it could be, I disagreed. All these improvements will not amount to very much, I suggested, until Jewish educating institutions and programs organized themselves around powerful ideas that define the nature and aspirations of Jewish education. Even as I said these things, I think you began glazing over; and I realized that they must have sounded to you

hopeless abstract and perhaps beside the point. And so, because I feel strongly about this, I thought it would be useful to clarify what I had in mind -- useful for me, because if I'm right, it's all the more important to be able to convey my point in a way that will ring true, and useful for you because, if I'm right, this may have a bearing on your work. Anyway, here goes.

What I meant is not unrelated to what I said earlier about continuity-advocates whose pronouncements aren't anchored in any understanding of why (and what kind of) Jewish continuity is important. Like them, most Jewish educating institutions that I'm familiar with are not guided by any powerful conception of what Judaism is about and of what we should be aspiring to cultivate in our learners. Instead, we meet up with a hodge-podge of aims and practices, which are individually under-developed and which don't hang together in any meaningful way. Imagine building a new house without any clear architectural or interior design plan: one person is given the responsibility for the living room, another for landscaping, a third for interior design, a fourth for plumbing, and so forth, without anyone overseeing the entirety of the project and asking, "What should the final product look like? What purposes should it serve? What will it need to look like if it is to be esthetically pleasing and functional for those who will be using it? How will the various pieces hang together?"

Look, for example, at the typical curriculum of a congregational religious school. Here you are likely to run up against subjects like Hebrew, Bible, holidays, prayers, customs, Jewish history, and Israel. But take any one of these subjects and try to enter into a conversation with the teachers, the principal, or members of the Education Committee around the aims of, say, the Hebrew curriculum and you don't get very far. It's not just that there isn't a systematic approach to the teaching of Hebrew; there also isn't clarity concerning the aims and the importance of the subject. One teacher may look at you with bewilderment when you ask this question, a second might speak about Bar Mitzvah competence or the ability to read the prayer book, a third might make reference to conversational or to biblical Hebrew; but you are unlikely to discover any clear and shared aim for the learning of Hebrew; nor is any of the teachers likely to say anything about the kinds of attitudes towards Hebrew that they hope to be nurturing. And if you move beyond this, and ask about the connection between the learning of Hebrew and other curricular initiatives and the kind of Jewish life which the school is hoping to encourage, you are, I regret to say, unlikely to meet up with a satisfying answer; more likely, you will encounter blank stares.

Nor is this just a problem with the teachers: the truth is, it's unlikely that most of the critical stake holders -- lay leaders, principal, rabbi, parents -- have given much thought to these matters. To give an adequate answer, I think, would require thinking seriously about the kind of Jewish human being they are trying to cultivate, a question that, seriously addressed, involves thinking about the nature and significance of Judaism. But such matters have typically not been contemplated in serious ways; and if questions of aim are addressed at all, they rarely get beyond the banalities of "strong Jewish identity" (Whatever that means!!) and "Feeling comfortable in a synagogue anywhere around the world" and "eschewing intermarriage".

And so -- I return to my original contention: more dollars, better trained personnel,

opportunities for informal education at summer camps and Israel--these are no doubt important; but they are no substitute for thinking about the most important question: education for what? What kind of a Jewish human being should we be cultivating? If, and only if, we answer this question, will we be in a position to thoughtfully plan adequate educational environments. For an adequate educational environment is one that is guided by some conception of what the enterprise is about.

I hope this clarified my views somewhat. I look forward to hearing from you.

Sincerely,

Daniel

Dear Pamela:

Thank you for your response to my letter. Since receiving it, I have been pondering how to respond to the important questions you raised. Let me begin by saying that you were right to take me to task for my comments about supporters of the continuity-agenda who aren't grounded in any well-thought-out conceptions of Judaism. You wrote: "I think I detected a judgmental tone in your comments about Jews who, though perhaps not sophisticated about the nature of Judaism, give their money, their, time, and their voice to the effort to strengthen Jewish life and education. Many of them **do** have deep beliefs about Judaism, even if they may be unable to put them into words. Besides, in an age when Jewish life is threatened with significant erosion, who are you to scoff at those who, for whatever reason, are working to stem the tide?"

To be honest, I had no clue that my comments might be construed as "scoffing" or contemptuous, and for this I am genuinely sorry - not just because I have no desire to offend but because like you, I have deep respect for those in the Jewish community who are devoting their energies and funds to the improvement of Jewish life. That said, honesty compels me to add that there probably was a judgmental tone to my comments, because I think that the efforts of those trying to improve the lot of the Jewish People are, for the reasons I indicated, much less effective than they have the potential to be: to the extent that those supporting the continuity-agenda do not have any clear sense of what it is in Judaism that is worth maintaining (Is it our tradition of studying texts, our sense of peoplehood, certain moral insights or insights into the human condition, strict Halachic practice grounded in certain beliefs about God, etc.), it will be difficult to exercise wisdom in deciding what continuity-initiatives to support. To which you might want to say, "Let's support **all** expressions of Jewish vitality"; but this is problematic both pragmatically and as a matter of principle. Pragmatically, it's problematic because we have limited resources to expend, and this necessitates making choices among competing opportunities. And as a matter of principle it's problematic because, to be blunt, not all initiatives that claim the mantle of Jewish continuity are necessarily worthy of support -- and some such initiatives will not necessarily do us proud. To which perhaps you respond, "From where does your authority come to decide which initiatives are and are not authentic expressions of Jewish life and continuity?"

A fair enough question -- to which I have, I think, a fair enough answer! And the answer is that all of us draw the line somewhere between what is and is not an authentic expression of Jewish life that is worthy of support. I can't, for example, imagine supporting Jewish continuity as understood, say, by Meyer Kahane or Baruch Goldstein, or Yigal Amir -- or, for that matter, and perhaps more controversially, by Haredi communities that de-legitimize the rest of the Jewish world. Now you may not agree with me about this -- it could well be that you draw your lines somewhere else. But I'm not asking you to draw your lines where I do; what I am asking you to do is to realize that you, too, draw lines, and that those lines reflect a certain conception of authentic and inauthentic (or, more weakly, of acceptable and unacceptable forms of) Jewish continuity.

So now I hear you saying something like this: "First, you complain that supporters of Jewish continuity aren't guided by any sense of meaningful Jewish continuity; and now you tell me that somewhere, deep inside, they are guided by some such understanding. Well, you can't have it both ways." This would be a fair criticism -- and it says to me that I was wrong to say that supporters of Jewish continuity are working with **no** conception of meaningful Jewish continuity. Rather, I guess what I really want to say is that the conception of Jewish continuity that, if only subliminally, informs the continuity-agenda is not one that is the product of reflection, study, and conscious decision, and this I find very problematic. Or, to put it differently, precisely because their efforts to support Jewish continuity are inevitably guided by some kind of conception of Jewish continuity, it's very important that they think very carefully about the kind of continuity that is really worth supporting. Enough on this!!

In your letter you asked me to say a little more about what I meant when I spoke of "a vision-driven institution" -- and, if possible, to give an example. The first is fairly easy for me to do. To my mind, a vision-driven educating institution is one that is, down to its very details, organized around a vision - or image, or conception - of the kind of person it's hoping to cultivate through the educational process. Not only, then, does there have to be such a vision in the minds and hearts of the educators who make up this institution, but it actually has to suffuse daily life -- from curriculum, to architecture, to evaluation and grading practices, to admissions-forms and policies, down the line!! More succinctly, a vision-driven institution is one that is demonstrably serious about nurturing its constituent-learners in the direction of its guiding vision.

This brings me to your second request: can I give you an example of a vision-driven institution? Fair enough! Unfortunately, I must confess that my initial response to this request was a feeling of uncertainty that I could point to a satisfying example. Not that there have not been, and are not now, significant and sometimes famous instances, of vision-driven educating institutions. A great example is the school built by John Dewey at the turn-of-the century in Chicago, a school that was self-consciously organized around his beliefs concerning the nature of life, work, learning, and the relationship between the individual and the group in a thriving community. Anything you might point to in the Dewey School -- be it the architecture, the curriculum (in math, history, shop, or what-not), evaluation practices, the desks used by the children, and so forth -- was designed with explicit attention to the school's aspiration to cultivate human beings with certain attitudes, beliefs, and habits of mind and heart. And, by the way, I could also point to such examples in the Haredi world; here too you could find communities supporting educating institutions that have a very clear conception of the aims of education, as well as practices and personnel that are at one with these aims.

But while these examples may help to give the flavor of what a vision-driven institution is, they may seem too far removed from the world you and I inhabit -- a universe that is Jewish but non-Fundamentalist, and that wants to nurture commitment along with openness towards and respect for other groups, both Jewish and non-Jewish. Are there, I asked myself after reading your letter, examples of vision-driven institutions within that world? As I've already intimated,

most of the institutions that are committed to this kind of open community are not vision-driven: eager to avoid any appearance of imposition, and in order not to alienate any of their constituencies, they adopt a rhetoric of aims which is so vague and abstract that it would be hard to dissent from it; but the reason that it's hard to dissent from this litany of aims is that it entails no commitments to any particular vision of Jewish life. The price they pay for a conception of what they are about that is, as Seymour Fox has said, so parve is that it fails to enlist the passion of the teachers, parents, and the children or to give much guidance to the effort to educate.

But fortunately, I recently heard about a Jewish day school outside the Haredi world that sounds precisely like the kind of vision-driven institution that I have in mind. With the promise that I will follow-up with more information shortly, let me begin by telling you what I have so far heard about this school. Called Beit Rabban, this school was founded in 199_ by Devora Steinmetz, a young woman with a doctorate in Comparative Literature from Columbia University who was at that time the mother of X children. As I understand the story, when it was time for her to send her son, a very able child, to school, Steinmetz discovered that none of the available Jewish day schools spoke adequately to the educational aspirations that she had for her son.

What were these aspirations? From what I've been told, she believes that Jewish education should help cultivate a human being who combines three essential elements. In no particular order, the first is that her son should develop into a person who is at-home with and knowledgeable in the Jewish textual tradition. For Steinmetz, this means not just a knowledge of the contents of different classical texts that include the Bible, the Talmud, and Midrash, but also an understanding of the relationship of these texts to one another; equally important, knowledge of this textual tradition includes the capacity to understand it in the original language, as well as the skills needed to understand what one is reading. This alone is a pretty ambitious agenda, but it is only piece of what Steinmetz apparently aspires to: she is also insistent, and that is a second element in her conception of an educated Jewish person, that her child develop into a critical problem-solver whose thinking is imaginative and creative and at the same time is constrained by demanding intellectual standards. Finally -- I think, anyway...I'll know more when I speak with her -- Steinmetz is apparently fiercely committed to an ideal of autonomy, although what she means by "autonomy" I'm not at all clear.

In any case, when Steinmetz approached the schools in her community with this set of considerations, she found it impossible to identify one that was suitable. True, she had some fond memories of some of the more traditional schools of the kind she attended as a young girl; for in these schools everything testified to the supreme and unquestioned value of learning -- and to the love of learning; but unfortunately, these schools tended to be much narrower and intellectually confining than she could abide: in fact some of these schools not only failed to cultivate autonomy but some of them actually discouraged it!! Why? Because to be autonomous is to view oneself as the arbiter of one's conduct; and this is an unacceptable outlook to those who believe that our actions are to be determined not by our own autonomous judgment but by the requirements of Halacha.

As for the “more modern” schools in the “Orthodox” or “traditional” camp, on paper they seemed more open and promising, and they certainly claimed to stress intellectual values, as well as the love of Jewish texts and the pre-eminent value of studying them; but as far as she could tell, in practice, while they emphasized the possession of a lot of knowledge, they did little to encourage the love of learning; and they scored very low on the scale of critical thinking! The emphasis was on rote-learning of the text, not on approaching it, in a spirit of critical inquiry, as a source of powerful questions and insights.

Nor were the so-called progressive day schools that surrounded her significantly more promising. While they exhibited a strong emphasis on nurturing creativity and autonomous choice with respect to various streams in Jewish life, Steinmetz apparently felt that they fell far short along other critical dimensions: most fundamentally, they were not intellectually serious and challenging environments. True, there was a strong emphasis on making learning fun and against following the dictates of authority; but there was no sense in these institutions that serious engagement with texts was an essential life-activity, that getting on the inside of these texts was critical, and that one’s thinking needed to conform to high standards of good thinking. Perhaps these environments were friendly, but they were not sufficiently challenging and serious.

In her rejection of both of the either-or alternatives that surrounded her, Steinmetz reminded me of John Dewey, the great American philosopher I mentioned above. Wrote Dewey:

And, like Dewey, she did not allow her vision of a school that reconciled the either-ors that surrounded her remain a pipe-dream: faced with a choice between two kinds of institutions neither of which seemed compelling, Steinmetz did what other parents only dream of: she decided to start her own institution, to build a school around her own understanding of the kind of Jewish human being Jewish education should endeavor to nurture. And now comes some bad and good news. The bad news is that I don’t know much more than I’ve just told you; but the good news is that I’ve arranged to visit the school and to meet with Steinmetz next week. I’m pretty excited and will share with you what I’ve learned shortly.

All the best,

Daniel

Dear Pamela:

I've just undergone a very exciting experience! Beit Rabban is every bit as interesting as I expected, and I'm not sure whether my excitement has to do with my identification with the school's animating vision or with the fact that this really is a school whose guiding vision powerfully informs day-to-day decisions and practices. But let me start at the beginning.

I arrived at Manhattan's Spanish-Portuguese Synagogue (from which the school rents two floors in an annex building) at about 8:20 in the morning. I find myself in the company of several children and their parents who are waiting to be buzzed into the building. True, this is New York, but I must say I was surprised that this is the way a child's day begins in this school. The wait afforded me a chance to speak to the father of two children who were standing near-by.

When I mentioned that I was interested in the school, he told me proudly that he's had kids in the school for five years and began raving about it, something like the only school we can imagine for our children...a very special place. Soon we were buzzed in and traveled, all six or so of us in a rickety old elevator, to the second floor.

Thinking that first impressions might be particularly significant, I tried to take it all in. Straight ahead of me was a small room that served as a library; to my right was a very small school-office and to my left was a wall with a bulletin board, underneath which was an old couch. The physical space was clean and very simple, perhaps even a little primitive. I took note of this as I headed into the office, where I introduced myself to an informally dressed, smiling young woman of about 22 or so. Elissa - that was her name - said that Devora (Steinmetz) was expecting me and would soon find me; in the meantime, I should have a seat outside the office. Rather than sitting, I looked at the bulletin-board above the couch and at the other walls surrounded me. What immediately impressed me is that the walls were not alive with famous sayings or with pictures but with challenging games ("Family Math Games") and questions of various kinds. As an example, in one envelope on the wall that was labeled "FAMILY CHUMASH LEARNING", there were sheets of paper containing a very exciting assignment. I immediately took a copy with the intention of sending it to you. I didn't stop to ask if it was okay to take it; I had only been there for a few minutes and already felt that taking this liberty was not just okay but something praiseworthy at this place. Anyway, take a couple minutes to look at it, because I want to share with you some of my reactions to it.

INSERT: FAMILY CHUMASH LEARNING

So here's what struck me about this exercise. First off, I absolutely loved the questions. Grounded in a careful reading of the biblical text, the questions are very real -- nothing school-bookish about them. And when you consider that these questions come not from a scholar or the teacher but out of discussions that take place among the children -- well, I personally was blown away! Not only was I not used to such questions as a child, I rarely encounter them as an adult. I was also impressed not just that the parents were offered rich information about what their

children were doing, but that the information came packaged as an invitation to review the pertinent texts as a family and to struggle together with the questions that had emerged in the classroom setting. Notice also that the homework assignment was not for the child to write down his or her responses to the problem but "ideas which emerge in the course of your family learning." This was designed as an effort to educate the child but as an opportunity for the family to come together in an inquiring spirit around the text. Talk about family education!!!

As I was looking through this exercise, a woman in her thirties approached and introduced herself as Devora Steinmetz. I informed her straight-off that I already had lots of questions but she suggested that before talking about the school, I do some observing, and she led me up a set of stairs to the classroom of the third and fourth graders. Physically, this room resembled what I had seen downstairs -- unimpressive but serviceable. There were 15 or so children in the room, dressed informally in jeans and t-shirts, with all the boys wearing kippot and one or two of the girls; Tzitzis were discernible on one or two children, but not most. At this moment, they were quietly reading to themselves or writing in small journals around three or four tables. As best I could tell, they were completely absorbed in what they were doing, and I found myself amazed at the complete absence of goofing around, the atmosphere of rapt attentiveness to what they were doing that emanated from this group of 8- and 9- year-old children. Devora introduced me to two young people, probably in their early twenties, who were quietly engaged in setting up the room for the day; she described them as the teachers of this class, and then she left. The two teachers and I conversed for a few minutes. I learned that both of them were recent college graduates and was surprised to hear that neither of them had trained to be an educator prior to working at Beit Rabban. I promised myself that I would ask Devora about this later on. For now, I simply listened as they explained that each class day began with a period of quiet, individualized work.

I used the time to look around the room. There was one - only one - old computer in a corner, and on the walls I saw written instructions for the way the children should study in Chevruta. The instructions emphasize understanding the text and searching for interesting problems to bring to the attention of the group. There were similar instructions for the study of Mishna; both sets of instructions emphasize working in partnership with others. "Brachot Acharonot" were also on one of the walls, along with a bulletin board that identified facts and questions relating to the moon, and another relating to "Historical Fiction" books of interest. One of the authors featured was Mildred Taylor, an African-American writer whose works describe the African-American experience. She is quoted as saying something like "I wasn't a particularly good writer, but I believed I could achieve whatever I set my mind to. The other author represented on the board was William Steig, and from what was written on the board, it looked like the children had read and sought to identify commonalities among several of his books. There was a rich mix of Hebrew and English on these walls. I was struck by the absence of any references to Israel on the wall.

After some twenty minutes, Tfillot begin, with the children sitting where they have been. The Tfillot are entirely in Hebrew, and the chanting is animated and in unison. Though they have Siddurim, many seem to know the prayers by hear. Amidst the general involvement, the

uninvolvement of one boy who was ripping the pages of his prayer book was hard to miss. I determined to ask Devora or the teachers about this as well.

Following the Tfillot, one of the two teachers, Devora, introduces the next activity which is focused around geographical facts, principles, and questions, and I am struck not only by the fact that her instructions are given completely in Hebrew but that with out exception the children seem to understand her. When she is done, they disperse to 7 stations, each offering different challenges, that have been set up around the room. The exercises are a mix of imaginative tasks requiring real thought. Some ask the children to be physically active and to do measurements requiring maps, globes, rulers, and strings, and some require interaction and sharing with others; but others are quieter activities that emphasize reading. One of them asks the kids to chart travel-routes on a map, a second is concerned with climate in different parts of the world, a third focuses on time-changes, and yet another asks them to find certain places on the globe. Perhaps the most popular of the activities is one where the question is: "If you met an alien, what characteristics would you point to, to explain to him where you live?", followed by the instruction that each of them should compare his or her answer with someone else's. The room is filled with the sound of children's voices discussing their various challenges in animated tones, moving from one station to the next with inquisitive interest and with no obvious goofing around. They are pretty much on their own for this activity, and the room is bustling with activity and movement -- a sharp juxtaposition with the ordered, almost routinized feel of the Tfillot. The teachers are present for this activity, but largely as resources or guides, offering help as needed -- in this context in English rather than Hebrew, and handling one or two minor behavior problems that arise; they are sufficiently confident of the children's engagement with the activity that some of the time they are off in another part of the room preparing materials for another activity.

When the activity is halted, they've been at it for a little less than an hour; it's now 10:10, and, in preparation for their snack, the children clean up the room quickly and with, if it's possible to imagine this, considerable enthusiasm. The snack itself is preceded by some announcements. Eitan, one of the teachers, voices the concern that some of the children aren't turning in their Chumash/Mishna home work. He reminds them that this is part of their responsibility, and then, instead of telling them why doing home work is important, he asks them for the reasons. The children are quick to respond. It shows the teacher you understand, says one child; as a result of reviewing, you will be better prepared for what's to come, says a second; if you don't do your home work, you will be less able to participate in class discussion the next day, says a third. Eitan affirms these points and then comments: "Home work shouldn't be purposeless. If you feel it's too easy, come to a teacher to ask for a more challenging assignment. If you don't do a home work assignment, hand in a note with an explanation. What is unacceptable is 'No note' and 'No assignment'."

Snack follows, with the teacher Devora beginning to read out loud to the children from a book entitled ZEKE PEPIN. But in the middle of the story a very tall man wearing a suit and a Kippa walks in. He is, it turns out, the father of Elissa, a girl in the class celebrating her birthday. There is a question from the teacher concerning whether the cup cakes he has brought

are parve, and he assures her that they are, his confidence grounded in the fact that he baked them himself. As he distributes the cupcakes, he asks the kids to advise him concerning how to improve them next year. As the kids are happily enjoying the cupcakes, he notices that I (whom he doesn't know) haven't gotten a cupcake, and offers one. After responding as I would have hoped to my question about cholesterol-content, he gives me a cupcake and inquires in a friendly name about my name and the purpose of my visit.

The snack concludes with Brachot Achronot, and Eitan sets the stage for their Mishna class, which, he tells them, will proceed in Chevruta. I am eager to see what this will be like but because I want to get a feel for the whole school before meeting with Devora Steinmetz I decide to go downstairs to another classroom. On the way out of the 3/4/5 classroom, I stop at the class's bathroom, and am reminded again how stark and primitive the physical environment of the school is. Small, almost closet-like, and very old it features an old toilet and sink, and nothing at all on the walls. The only utensil or object in the room other than soap, toilet paper, and paper towels is a cup, presumably there for Netillat Yadayim.

On my way out of the room, I mused about the juxtapositions I had encountered over the last couple of hours --the quiet engagement that marked the day's first activity as compared with the animated, cheerful conversation and activity that was characteristic of most of the morning; the univocal, sing-songy, almost rote rendition of the Tfillot, juxtaposed with the intellectual curiosity and excitement with which the children greeted the other activities of the morning and the informality of the environment; the primitiveness of the school's physical facilities juxtaposed with the richness of the ideas and content on the walls and the warmth of the social environment.

A few minutes later, I find myself in what is the tail-end of a second grade class made up of 5 or 6 children and a teacher in her twenties, all sitting around a small table. The conversation among them is entirely in Hebrew, and I am, to be honest, awed by the children's fluency. Apparently, they have been studying vitamins, and they are now in the middle of working on a play in which the vitamins will figure prominently as characters. The feeling around the table is almost familial, with the teacher making sure that all of the kids stay involved and have a chance to participate. A couple of times in the course of the conversation, the teacher turns to the kids, and then to me, in search of a word, and at least once one of the children was able to help her out.

Later, she explained to me that though her Hebrew-level is not as high as she would like, the school is committed to the idea that American Jews can speak Hebrew, and that speaking it is not an all-or-nothing affair; one can and should continue learning, and for her to model this possibility and desire is, from the school's vantage point, a plus. In response to my questions, it emerged that she has an MA in Jewish education from the Jewish Theological Seminar, and that this is her first year in full-time teaching. About the work I had seen her do with the children, she explained: she personally has some background in drama and, having discovered that the children love it, she has decided to make it central to her Hebrew curriculum, making the language-learning an integral part of an activity (writing and performing a play) that the children find exciting.

Still later in the day, I wander back up to the 3/4/5 classroom where I find the children engaged in Torah study. As I enter, I hear the sounds of Torah-trope all over the room. The children are in groups of two around the room, with one member of each group chanting the passage in question and the others following along, ready to correct him or her as necessary. The assignment, I'm informed by the two third grade boys I've joined, is for one of the children to read the text with trope, and for the other to then translate it. Both boys read very well, and one of them (who turns out to have spent two years in Israel) is a superb reader; they proceed along steadily until the whole class is called together by the teacher to consider the passage together. The passage (GENESIS, Ch. 1:27) declares that "in the beginning God creates the Adam in His image, in the image of God He created him; male and female He created them." Immediately a question: "Why are we told three different times that God creates the human being?", followed by a succession of hypotheses from the children. Again, what does it mean to say that the human being was created "in His image"? Does God have a physical image -- and if not, what can "b'tzelem (in the Image of) refer to? Does it mean that we are "like God", and if so, in what sense? Are we, one child wonders, like God by virtue of having eaten from the Tree of the Knowledge of Good and Evil?"

For me, once again, the experience of being "blown away". Here are young children encountering and raising serious questions about the Text in a serious spirit --- light-years away from the kind of Torah-study that I encountered as a child or that I have typically seen in Jewish religious schools, a form of study that not atypically stops with uncovering the surface meaning.

I am in the middle of this class when I see Devora Steinmetz at the door. She waves me out of the room, and I follow her to a barren little room that's a cross between a storage room and an office. She has a free hour and thought this might be a time for me to ask my questions about the school. I use the occasion to re-introduce myself, reminding her that what drew me to her school was the hope of discovering a vision-driven education institution. "Vision-driven institution?", she asked, and I explained, "An institution informed, down to its very details, with a conception of the kind of person you're hoping to cultivate. She nodded, as if to say, "I know what you mean" and without any suggestion that I had been misled in my decision to visit the school. And the more we talked, the more I understood why: while the practices of most schools reflect the interplay of a diverse number of often idiosyncratic circumstances, Devora really did have a guiding idea that informed her every decision!

What was this guiding idea?, I asked her. Had I been rightly informed by those who spoke to me of the school's commitment to "at-homeness in the Textual tradition, critical thinking, and autonomy." Steinmetz smiled weakly and suggested that while these three ideas are very congenial, just listing them the way I just had fails to capture their inter-relatedness"; and besides there are important things that are altogether missing. So I asked her to elaborate.

For one thing, she began, these formulations don't really get at the spirit of the school, at its uncompromising, but often playfully expressed, commitment to there being reasons for the

things we believe and do, and these reasons themselves must be constrained by standards. Can you be more concrete. I asked her? Well, she responded, whatever classroom activity or newsletter you look at, and whatever teacher's meeting you happen into, you will find the search for good reasons to be central to what is going on. When the children are reading a page of Chumash, and the question is asked....Devora stopped herself midstream and said, "Look before getting into this, why don't we start with some of your impressions. I'm hoping to learn something from your perceptions of the school." "Okay," I responded and found myself articulating something that had been making me uneasy. With more time to consider, I might have raised a more innocuous matter; but as it turned out, the question I raised led to a wonderfully illuminating conversation. Here's what happened.

I commented on the fact that the teachers seemed very bright but also very young and, as it were, "green" as best I could tell, some of them had little or not formal training or much experience as educators. Devora responded with a story about an experienced teacher who used to work at the school and on whose bulletin board she was disturbed to find, above a series of student-assignments, the phrase "Avodah M'tzuyenet" ("EXCELLENT WORK"). Perplexed, I interrupted Devora with the question, "What was disturbing about this?" Her response went something like this: First, children should not be rewarded for so-called excellent work because to a substantial extent excellence, as ordinarily understood, is a result of the gifts that the child has been fortunate enough to acquire through heredity or a particular familial environment. It's just not right that one child should be rewarded for achievements that are due to gifts for which he or she can take no credit, while other children who are not so blessed, should go unrewarded and unacknowledged; and it's wrong that one child who can do an assignment beautifully (by the teacher's standards) in five minutes should be praised, while another child, who is perhaps less able, works for hours on the same assignment and receives a luke-warm response because he or she has produced something that, by the teacher's standards, is less accomplished. This sends exactly the wrong message! Instead, Devora believes, children should be rewarded for doing the best they can and for growing beyond their previous levels of achievement. Not only would this avoid invidious comparisons between students, it would communicate to all the children, whether particularly able or not, that there is always a possibility for growth, as well as for stagnation. In a well-designed school, the particularly able student shouldn't feel smug and able to rest on his or her laurels; nor should the less able student be feeling bad about him- or herself. Both should be encountering and seriously responding to challenges that take them beyond their current levels of understanding and achievement; and their sense of themselves as learners should be grounded in this, rather than in where they stand relative to one another or to some absolute standard of excellence announced by the teacher.

You don't, I asked, believe in standards of excellence? Devora paused for a moment, and then said, "Let me approach this by explaining the second reason I was bothered by the teacher who identified 'Excellent Work' on the bulletin board." And she went on to explain that she was troubled by the notion that the children should come to think that their job in school and, by extension, in life was to conform to and adopt the teacher's own standards of excellence. Rather, she added, we should be trying to encourage autonomy in the children -- and this was the wrong way to do it!

"Autonomy, I said. "Yes. I recall hearing that this is one of the school's guiding principles. Maybe this would be a good occasion to say something more about what you mean by autonomy. But before you do, I'd like to clear something up. What does all this have to do with the fact that your teachers tend to be young and inexperienced?" "The answer is pretty straight-forward," said Devora. "The teacher who put 'Avodah M'tzuyenet' on the board was a very 'experienced' teacher; but for that very reason she had been shaped by her many years in school to think about children, teaching, and educational aims in a particular -- and particularly rigid -- sort of way. In my experience, it's extremely difficult to bring such a person to see things in a new way. In the case I described to you, the teacher couldn't get what I was talking about, or if she did, she didn't identify with it at all. So what does this mean? In my view, you're better off bringing in someone who is enthusiastic and inexperienced but not yet mis-socialized! True, we pay a price for the young person's inexperience, and I have to devote hours of time every week helping them grow as educators; but it's relatively easy with these young people to draw them into the school's way of thinking about education and children."

I commented that this reminded me of the notion that those who had known Egypt were too contaminated by their prior experience of slavery to enter the land of Israel in the spirit of free men; hence the need to raise a generation that had not known Egypt. Steinmetz nodded, adding that she does, indeed, believe that it's often hard to reverse the socializing effects of early experience. In fact, this is one of the reasons she believes in the importance of early childhood education -- so strongly that she decided to start the school!! I found myself wondering how Steinmetz understands the idea of T'Shuvah in Jewish thought, whether she's skeptical that, after a certain point, people are capable of change; but I decided to hold off on this question for now. Instead, I asked her if she could come back to the question of what she means by autonomy. What, I asked, does she have in mind when she speaks about autonomy?

Steinmetz began by suggesting what autonomy is not: though autonomy involves not taking one's beliefs and value-plans on the authority of someone else, it is not simply a matter of having one's own views about the world and about life. She would not, she said, describe someone as autonomous unless that person also had reasons for the views or positions that he or she espoused. Everywhere you look in Beit Rabban, you'll see that we try to convey the importance of reasons, even in very minor matters. For example, instead of inviting the young children to gather in a circle, the teachers will say something like, "Let's sit in a circle so that we can all face one another."

I commented approvingly about the school's effort to encourage the children to articulate why they think what they think, and while Devora accepted the comment she felt impelled to add that "By 'reasons' I actually mean more than an ability to explain why you believe what you believe; it's also the ability and willingness to show that these reasons satisfy appropriate standards." When I asked her what she meant by this reference to "standards", she responded with an example. Children at Beit Rabban are regularly encouraged to think about challenging questions evoked by the Text, [and here I found myself remembering the questions I had heard in the classes I had visited and seen on the bulletin boards of the school]. But unlike schools that

reward “right” or “creative” answers, or that affirm any self-expressive response, at Beit Rabban children are always asked to defend their views with attention to reasons. What’s the evidence in the text for the view that you are offering, and is this view consistent with the grammar of the text or other ideas we are encountering? In other words, not all answers are on a par; a worthy one is grounded in reasons, which themselves can be judged as appropriate, well-grounded, and so forth.

By now my mind was buzzing with questions and bewilderment, and a lot of it came out at once. “In complaining about the teacher who put ‘Avodah M’tzuyenet’ on the board, weren’t you objecting to the idea of conveying to children that they are accountable to other people’s standards? But isn’t this exactly what you are doing when you demand of children that they offer reasons of a certain kind in substantiation of their views?” Devora started to answer, but I continued: “And another thing: how does this commitment to autonomy fit in with the Jewish outlook of the school? After all, this certainly seems to be a Modern Orthodox kind of a school which takes Halachah seriously? How does autonomy fit into a world-view that takes our being commanded beings seriously? And....”

Now it was Devora’s turn to interrupt me. Though she wasn’t exactly bristling, she seemed somewhat agitated or perhaps irritated. “Though people outside the Orthodox orbit often identify us as Modern Orthodox, Beit Rabban is NOT a modern Orthodox school, any more than it’s a Conservative or a Reform or a Reconstructionist School. It never ceases to amaze me how much people seem to feel the need to categorize us. Beit Rabban IS a Jewish school, but it cannot readily be categorized; and one of the reasons that the Orthodox community does not recognize us as belonging to is precisely what you have just pointed to: our commitment to autonomy, a commitment that they find utterly unacceptable. The more, they rhetorically ask, you convey to children that they are right to expect reasons for beliefs, aren’t you undercutting the idea that we are commanded to act in certain ways, quite apart from whether we understand the reasons? So wary are some of these people about nurturing an autonomous outlook that even in small matters that are not governed by Halachah they resist encouraging the children to think for themselves lest the seeds of a dangerous disposition be planted.”

“But,” I responded, “why are you **not** worried about planting this position? And granted that ‘autonomy’ is a Western virtue extolled by the likes of Kant and the rhetoric (if not the reality) of everyday life, since when is it a Jewish virtue?” “Since almost the very beginning,” Devora quietly responded and offered me an article she had written that compared human agency, sin, and the consequences of sin in our earliest ancestors -- in Adam, in Cain, and in Noah. She suggested that I read the article and that, after we had both had more time to think about some of the issues we had been discussing, we return to our conversation tomorrow. And off I went, eager to read what she had to say.

Here, in brief, is what I made of her article. Steinmetz observes that there the history of the world can be broken down into three eras, all of which are described at the beginning of GENESIS, and in the last of which we find ourselves today. The first era, that of Eden, ends with the sin of Adam and Eve and their expulsion from Eden; the second era, from the expulsion

up until the Flood, features the sin of Cain; and the third era, which is the postdeluvian era in which we now find ourselves, begins with the sins of Noah and his son. Argues Steinmetz: if we look carefully at these three stories of sin, we discover, as we move from Adam to Noah, that human beings assume an increasingly autonomous role in relation to their responsibility for their conduct. Whereas, for example, in Adam's case, the rule that he violated was explicitly given to him and the urge to sin is viewed as emanating from outside him (via the serpent), in the case of Noah, there is no explicit prohibition (He himself is responsible for determining what is right and wrong) and the locus of agency is completely in himself. Suggests Steinmetz: long before Kant and modernity, the image of human beings as moral agents, responsible for determining their own conduct and carrying through with it in the face of resistance, is already present early on in the Bible. And, as best I can tell, it is this image of human beings that informs Steinmetz's aspiration to nurture autonomous human beings.

As I thought about this, I wondered to myself whether this image of human beings as autonomous is something of an aberration and whether the weight of Jewish Tradition points in a more heteronomous direction, and I want to ask her about that. But it did occur to me that in the Talmud we find some powerful images of intellectual autonomy in the rabbinic figures who argue the merits of different Halachic positions with reference to higher order standards that involve faithfulness to the Text and to the spirit of the tradition. Perhaps, then, Steinmetz is on solid ground in suggesting that there is a tradition of intellectual autonomy in Jewish tradition, a tradition which, at least to this extent, is close to the spirit of modernity.

By the way, the article also helped me to realize that Steinmetz's understanding of autonomy includes far more than the notion that our ideas should be our own and grounded in critical thinking and reasons. It is also, as with Kant, a fundamentally **moral** notion: an autonomous person is responsible and accountable for his or her conduct and its predictable consequences; and this is a fundamental feature of his or her identity as a human being. With this understanding, I saw the homework-incident I described to you in a new light: rather than reading the kids the riot-act concerning homework or trotting out the reasons for doing the homework, the teacher, Eitan, had asked the children themselves to articulate the reasons for homework. As if to say: your conduct should flow from considerations that you yourself recognize as reasonable. To be honest, though, I couldn't help but thinking about what Rousseau might have responded to this approach: for Rousseau is sharply critical of Locke's notion that one should "reason with children;" children beneath the age of Reason cannot really appreciate our reasons. While they may pretend to be convinced by our reasons, really they are convinced by the bribes or threats which they know lie behind our reasons. I determined to ask Steinmetz about that. Meanwhile, I found myself noting other features of the school that seemed to connect to the ideal of autonomy -- for example, the emphasis on activities that require the children, either alone or in small groups, to work on their own.

When we met the next day, I let Steinmetz know how clarifying I had found her article and asked her for additional examples of how her commitment to autonomy is reflected in the life of the school. She was ready with two examples. A few years back the children in the kindergarten-first grade were reading a series of books that had received Caldicott Awards, and

at some point the question arose - I don't remember whether it was from the teacher or the children: how was it decided which books get this award? It was agreed that a letter should be written to the Caldicott-people, requesting their selection-criteria. But what we got back was an unsatisfyingly vague answer which gave us no real information. So the teacher then suggested an idea which caught fire with the children: why don't we invent our own book-award, to be given to books that we ourselves judge to be outstanding! The kids loved the idea and found themselves embarked on a successful effort to develop their own standards for book excellence. Instead of spending their early years just internalizing others' standards or inhabiting a world in which, in the spirit of "I'm Ok; you're Ok", adults tried to shield them from all standards, the children had a chance to develop some understanding of how and why standards come into being and to begin developing their own.

Before I had a chance to respond, and as though anticipating that I was very curious about how the commitment to autonomy fit with the school's apparent seriousness about Tradition and Halacha, Devora continued with a second example -- a fascinating project concerning whether it was Halachically okay to use lights on Shabbat. The example is pretty long - and it's already late at night - but let me at least begin describing it.

Here's the background. After two years of intensive Hebrew (and I'll sure vouch for the fact that the third graders speak, understand, and read Hebrew with ease!!), the third grader participate in a twice-daily Beit Midrash: they study Chumash in one of them, and Rabbinic literature in the other. There's a strong emphasis on the inter-relationship between the two literatures and the pertinence of what's studied to our own lives. In this particular year, the children looked intensively at everything that is said about Shabbat in the Chumash; they tried to understand the relationship, pointed to in the Text, between Creation, Shabbat, and the Mishkan, and they also tried their hand at identifying the kinds of prohibited labors that might emerge from attention to the Chumash alone. Then, always grounding themselves in the text, they went on to consider the various labors proscribed in the Talmud: they encountered and considered the implications of different explanations for why there are 39 prohibited labors; they worked to understand the major categories of prohibited labor; and they tried to understand the underlying principles at work in what is prohibited. Beyond this, they wrestled with the implications of the Rambam's commentary on Leviticus 23:24 in which he suggests that it is possible to keep "the letter of the law" but violate its "spirit". The children were asked: "What place do you think a conception of the 'spirit' of the law ought to have in shaping our attitudes and our actions?"

Like I said this is all background to the project that excited me. Simultaneously as the children are studying what is and is not permissible on Shabbat and consistent with its spirit, they have been involved in studying the effects of the Industrial Revolution on our lives and on the nature of the work we do. All of this leads to a detailed study of the incandescent bulb, reading primary and secondary sources about its invention and exploring basic electrical concepts as they build circuits and create simple electrical gadgets. Finally, they are asked to imagine how the invention of the incandescent light bulb might have been greeted by Jews who had heretofore relied on candles and kerosene lamps for light. Here's the exercise:

Imagine hearing that Edison has invented an electric bulb and imagine seeing a light bulb for the first time. You find yourself over Shabbat in a home that has electric lights, and you wonder whether you may turn one on. What considerations are pertinent? And what do you decide?

Well, Pamela, I wonder how you would address this question. In fact, why not give it a try, and let me know what you think, and then, in my response to you, I'll let you know how I'd approach the problem, before going on to describe what happened in Beit Rabban. I suggest this not to be coy, but because this letter is getting way too long, and I have to run. I look forward to hearing from you.

Daniel

Dear Pamela:

I'm sitting in a coffee-house not far from the local hospital. Sitting near me is an elderly man, looking agitated. I notice a plastic hospital-bracelet on his hand, and I fantasize that he's seriously ill and has felt the need to escape from the hospital for an hour, perhaps to escape his condition for a few minutes or perhaps to address it. Either way, I wonder what intellectual resources and beliefs he has available to him -- which ones have been passed on to him -- to make sense of his condition (as I fantasize it to be). When I think about the education children receive in public schools, I think it's pretty clear that little is offered; but this is perhaps understandable, given conventional understandings of the public school's mandate. What's less understandable is that children are not offered much more than they get in public school in many Jewish educating institutions -- and this, despite the fact that our tradition is so rich with different voices that help to interpret and articulate our condition in the world. All of this is very sad; sad because of what we don't have a chance to access, and sad because providing meaningful access to the tradition's insights into the human condition might do a lot more than we think to encourage Jewish engagement and self-identification.

Why am I writing you this? I suppose because it seems to me pertinent to the challenges of Jewish education. In relation to our own subject, I suspect that the children who go to Beit Rabban will, by the time they graduate, have access to the Tradition's insights about the human condition and will certainly have the intellectual tools to find out what the Tradition has to say, should they want to find this out. At the same time, I wonder whether the children at Beit Rabban really stop to contemplate "the big questions" of life in a personal and imaginative way, or whether their energies are exhausted in the ever-exciting challenges of continuing inquiry. This is not a criticism, but a question; maybe I'll pose it to Devora.

Anyway, back to the light-bulb activity. You responded to my question by saying that as a non-Halakhic Jew, the question of whether using electric lights on Shabbat is simply not an issue for you. In my own case, I confess that I would not have a clue about how to proceed to answer the question in an Halachic way, but given that Shabbat plays an important role in my life, I would feel the need to address the question. My sense is that I would probably refer back to the importance of "the spirit" of the day and try to develop a position that spoke to this issue. To do this well I'd have to give some real thought to what I have in mind when I speak about the spirit of Shabbat.

Now let me tell you how the Beit Rabban children approached this problem. They began by investigating whether turning on a light conflicts with one of the explicit categories of forbidden labor -- or, if not, whether it perhaps violates the nature of Shabbat. But to answer this question seriously involved them in developing a deeper understanding of the nature of the forbidden labor (for example, "kindling a fire" in question) and of what goes on in the lighting of a bulb. Which is what the kids went on to do! Their inquiry into the nature of fire led them to identify characteristics like heat, light, and combustion as defining characteristics, and then they

went on to inquire whether these elements were sufficiently present in lighting a light bulb to warrant putting this activity under the category of “kindling a fire.” Some of the children went through parallel inquiries as they considered the possibility entertained by some *poskim* that putting on a light falls under other categories of forbidden labor.

And now comes the important point (if, that is, you haven’t forgotten that Devora described this case to me because I was confused about how the school’s interest in autonomy **and** Tradition related to each other): based on all of the foregoing activities and learning, each child is expected to come up with his or her own perspective on the problem. As she wrote in a Newsletter describing the activity:

They will argue their hypotheses based on *halakhic* thinking, scientific evidence, reflection on the nature of work, and a deep appreciation of the prohibition of labor on Shabbat. They will challenge each other’s ideas and they will be challenged by the ideas of scholars, past and present, introduced by their teachers. Each child will emerge with his or her best understanding of this question.

There are, as Devora pointed out in her Newsletter, other benefits to this activity as well: it’s a chance to better understand the entire process of the Oral Law and its relationship to scripture, as well as the way in which a Jew can fulfill the obligation to apply Torah to daily life in the midst of rapidly changing circumstances. But, I want to focus for a minute on what **this** episode can teach us about the relationship between autonomy and Tradition, both in Devora’s thinking and in the life of Beit Rabban. Devora did not herself spell this out for me, but here’s what I inferred.

First off, there was certainly a strongly autonomous dimension to the children’s light bulb project: it’s not just that they were engaged in a number of fairly independent inquiries, but that in the end, it was the right and responsibility to come up with their own judgment concerning whether it’s okay to turn on lights on Shabbat. But notice: not only were they asked to defend their views with reasons, the kinds of reasons that were relevant grew out of a rich familiarity with biblical and rabbinic sources concerning Shabbat, as well as out of reflection concerning the spirit of Shabbat. So what we have here is **autonomy within the framework of the Tradition**, with the resources of the Tradition providing the concerns, the tools, and the ideas that enter into the effort to decide an autonomous position vis-a-vis the problem at hand.¹

Now I suspect that for you this might not be an entirely satisfying solution to the relationship between autonomy and Tradition. After all, I can hear you (or if not you, many

¹ This position bears an affinity to Richard Peters’ “Habit and Reason in Moral Education”.

others) saying: wouldn't real autonomy also include not just the ability to make decisions within the framework of the Tradition, but also the ability to decide whether to accept the framework of the Tradition. This is an interesting question, which, because I also find it a bit troubling, I will pose to Steinmetz. But, for now, let me just say this (which is actually in support of her position): if Devora is claiming that autonomy has its meaning within the framework of the Tradition, this would not be an eccentric or unconventional understanding of autonomy: for when autonomy is more than empty rhetoric, it usually, if not always, operates within the framework of a particular tradition. When we think of moral autonomy, we think of people making moral decisions within the constraints of the moral point of view, and when we think of the autonomy of a scientist we think of a person who is steeped not outside of the tradition of science but on the inside -- someone who is steeped in its canons and standards of evidence. I find myself thinking of how my 8-year-old son develops into an autonomous chess-player not by stepping outside the framework of the game, but by mastering its rules and applying them in a thoughtful way. If we take this example as a guide, we might say that what autonomy is, is actually defined by particular "games" or traditions.

All of which is not to dismiss the question about how Devora would respond to the child who, in an "autonomous" spirit, asks about the bindingness of Halakha. Let's get back to this. And by the way, with all this talk about "autonomy". I think we've neglected a dimension of the school which may be as important: namely, the ideas about community and responsibility to others that inform the development of Beit Rabban. More on this soon.

All the best.

Daniel

MANDEL FOUNDATION

TO: SEYMOUR FOX, ADAM GAMORAN, ELLEN GOLDRING, ANNETTE HOCHSTEIN, ALAN HOFFMANN, BARRY HOLTZ, ELIE HOLZER, DANIEL PEKARSKY, DANNY MAROM, NESSA RAPOPORT, LEAH STRIGLER

FROM: GAIL DORPH

SUBJECT: FEBRUARY MEETINGS

DATE: 01/29/99

CC: SARAH FEINBERG

We have two sets of meetings scheduled for February.

Wednesday, 2/17

Indicators Meeting 11:00 – 5:00pm

Thursday, 2/18

Publications Meeting 8:30 -- 12:30

Lunch Meeting 12:30 –2:30

Even though all of you will not be attending both meetings, I am enclosing all of the papers associated with these meetings to keep us "all on the same page."

So... this package contains an agenda for the Indicators meeting and the background papers associated with this project.

For the publications meeting, you will find seven papers, each connected to earlier work of this organization.

Three of them (Synagogue Change, Lay leadership, Jewish leadership programs) are the results of interview studies. We have made commitments to the people interviewed to share what we have learned.

There is a paper on Beit Rabban, a vision-driven institution. This paper is at an early stage of development.

The report on Educational Leaders is based on the data gathered in the CIJE Study of Educators. These findings have never been disseminated.

The essay on professional development and the TEI evaluation report are connected to TEI work. The essay/policy brief is one of the products that we promised Cummings when we received the original grant.

We have prepared two different versions of the evaluation report—a long report which is included for your information. I will soon be sending you a shorter version for which we see a wider audience (at least to TEI participants).

Two papers which were mentioned above are not in this package and you will be receiving them during the week of February 8: the shorter TEI evaluation, you will still be receiving the paper on lay leadership.

Looking forward to seeing you in February.

MANDEL FOUNDATION

TO: GAIL DORPH, SEYMOUR FOX, ELLEN GOLDRING, MARK GURVIS,
ANNETTE HOCHSTEIN, ALAN HOFFMANN, BARRY HOLTZ, ELIE
HOLZER, DANNY MAROM, DANIEL PEKARSKY, NESSA
RAPOPORT, LEAH STRIGLER

FROM: GAIL DORPH

SUBJECT: PUBLICATIONS MEETING

DATE: 02/08/99

CC: SARAH FEINSTEIN, ADAM GAMORAN, CHAVA WERBER

Enclosed are the other papers that I promised:

1. An introduction to Dan Pekarsky's paper on Beit Rabban
2. Paper on Lay Leadership Interview Study by Pearl Beck
3. Short Form of Evaluation of TEI by Renee Wohl

You should already have received papers by

- Ellen Goldring on Leadership,
- Ellen's summary of Sally Gottesman's paper on Interview of Leadership Programs in Jewish Community
- Barry Holtz on Professional Development,
- Dan Pekarsky on Beit Rabban,
- Lisa Malik on Synagogue Change Research Project,
- Renee Wohl's long form of TEI evaluation (for your own info—this is an internal document)

See you on February 18. Our meetings are scheduled to begin at 8:30 that morning.

Gail,

Thanks for sharing with me the two reports on TEI Cohort II. I am very pleased to see them come out. The summary report in particular is well written and clear. It should be helpful in a variety of contexts, including our contacts with funders. I have some comments I'd like to share with you. I have two reasons for offering these comments. First, they may be useful if the reports are used for any purposes beyond reports to the participants, faculty, and funders, such as for research. Second, some of my comments relate to the evaluation strategy, and this may be helpful in designing future evaluations.

1) Images of professional development

In the summary report, the section on "New Images of Professional Development" is potentially the most powerful element of the evaluation. This is because it has a "before" as well as an "after". It is not forced to rely on *perceptions* of change, but can potentially show actual change in the ways respondents speak about their professional development. To fulfill this potential, the evaluation should document the changes by including some "before" quotes, in addition to the "after" quotes, to strengthen the comparison.

The same comment holds for the section on "Images of Professional Development -- Before and After" in the longer report. Here, I was especially surprised not to find any quotes from the baseline interviews, which could then be compared to the follow-up interviews as a way of documenting change. The section on images (p.10) jumps right into what participants no longer think, without characterizing what they thought and said before they began the program. Later, descriptions of *what participants are doing* offer compelling evidence of views that are consistent with the TEI approach. However, they would be even more convincing if we knew what these participants were doing beforehand. For example, in the follow-up, Sarah says "TEI has totally influenced me" (p.19). She then goes on to describe what she is doing. What was she doing before? How do we know she was not already working in this way? Similarly, Vivian, Miriam, and Judith show they know the importance of text (p.22-25), but what were they thinking before? The baseline report should have information about this.

A problem with the kind of comparison I am seeking is that the follow-up interview set things up to emphasize subjective rather than objective indicators of change. The follow-up interview asked, "How has TEI influenced your thinking about professional development?" This led to the kind of responses described in the report. A more neutral way of asking the question, which we used in the baseline, was "What do you think of as good professional development?" The follow-up could have asked the same question, and the answers could have been compared. I'm not saying the follow-up was biased. The respondents could, of course, have said "TEI did not influence me," or given other negative responses. But the way the question was asked has led the evaluator to take the responses at face value. It is good to see that the respondents believe their thinking about professional development has changed as a result of participation in TEI. But I believe it is even more important to make an external judgment about such change. The evaluator seems to have done that -- she characterizes the baseline views of professional development as anemic, and the current views as richer, etc. -- but this position would be strengthened with more

explicit comparisons. Why not give “before” and “after” quotes for the same individuals? Beyond this study, we should design our evaluations to focus on externally indicated change instead of self-perceptions of change.

2) Organization of the long report

The long report needs an introduction that explains the purpose and format of TEI, and the purpose of the evaluation.

For narrative purposes, I would put the material about what TEI was like -- professional, collegial, spiritual, etc. -- *after* the section on changing conceptions of professional development. I would make this revision to emphasize changing conceptions as the key finding of the report. Then I would ask, how was this accomplished? The description of TEI would be part of the answer to this question. This could then be followed by the analysis of teams, which I found very persuasive. The main substantive finding here, in my judgment, is that if community collaboration and support are not already in place, TEI is not a sufficiently powerful intervention to create what is missing.

In the section reporting on the experience in Israel, I was surprised there was no comparison of those who attended the Israel seminar with those who did not. Since Israel was an intensive learning experience, I expected to find greater changes among those who attended.

The sample list in both the summary report and the long report have figures on teams that do not add up. In the summary report, it looks like 10 persons were interviewed as 3/3 -- I think one of them must be a 4/4 because there are only 3 listed as 4/4. The list in the long report has similar problems.

3) Conclusions

I strongly endorse the conclusion in the summary report about the benefits of case studies to document how educators put their new conceptions into practice. I would also support bringing these findings to a broader audience. Indeed, I think the summary report (with the modifications I suggested) could serve as the basis for a policy brief. It has the potential to offer three powerful findings:

1. TEI resulted in documented changes in views of professional development from discrete, fragmented, and anemic to coherent, ongoing, and robust.
2. As a result of TEI, participants recognize the centrality of text, and more generally, focus on content in addition to process.
3. The community and institutional context is of great importance in realizing the benefits of a richer understanding of professional development.

These findings are important. They can guide not only the work of the Mandel Foundation but also that of others working on professional development for teachers. Let's find a way to get the word out.

Pearl Beck - written work

GA presentation

well written, clear, focused, concise
for the most part

conclusion that full-time volunteers "not rep of future women leaders"

- assumes ~~that~~ ^{employed women} will be leaders
- ok - full vol decl

- pt that "merely setting women on the board not ^{improving}" is credible

Manyan rpt

shows ability to ^{to ask & address questions} work as ^{of team} ~~not as~~ ^{to reason from data}

skimmed - well done if you believe in reputational selection

- no CITE not one of the 40 "key players in the Antisep"

- no 40% raised as (intermediate) teens

20% raised reform, 30% currently reform

98% Jewish spouses

New Brunswick elderly

exec summary is a long list of findings

- what's the story here?

not sure who aud's - too much laundry list ~~is~~ ^{are}
but that's prob a bad assumption

I had a few comments on the “Lay Leadership” report of Feb 1999 which I thought I’d pass along. Generally I found this project had made a lot of progress since August 1998.

It would be useful to have a sense of how complete the sample is with respect to the total leadership population of the three cities. Is it 10%? 20%? If “leadership” were defined narrowly enough, e.g. committee chairs and up, I think this question could be answered.

The finding about this high proportion of working women (in addition to working men) seems very important. Even though this report cannot say much about recruitment (since there were no interviews with non-participants), the finding about working women has implications for the amount and distribution of work that may be expected from lay leaders.

P.9 gives information about the Jewish backgrounds of lay leaders. This might be compared to the NJPS and to Jewish teachers described in The Teachers Report of the CIJE.

From comments about recruitment on p.13, I get a sense that Jewish lay leaders are recruited from a very narrow slice of the population. This information seems useful to me.

On p.16-18, I wondered whether the rewards and frustrations of serving on boards were noted by the same persons, or whether some people found service rewarding, and others found it frustrating.

On p.25, I found it interesting that the first two major challenges noted for Jewish education are the same two “building blocks” of A Time to Act. Are we seeing the diffusion of an idea? Or does this simply reflect the views of persons who served as commissioners in the preparation of A Time to Act?

Hope this is useful,

Adam

Beck

Balt, Cleveland, & Seattle

need an estimate of how complete the sample is
w/r/t total leadership pop in the 3 cities

findings on work status - imp!!

p. 9 Jewish bks - compare explicitly to t's???

p. 13 shows narrowness of recruitment!!

were the rewards & frustrations cited by the same persons?
- or did some people find service rewarding, others frustrating?

p. 25 interesting that 1st 2 major challenges cited
are the "old bks" of ATA
- diffusion of an idea??

paper can't say much on recruitment since
didn't interview non-participants

**Lay Leadership in Jewish Education: Recruitment, Retention and
Development**

**Pearl Beck, Ph.D.
Mandel Foundation**

February 1999

Lay Leadership in Jewish Education: Recruitment, Retention and Development

I. Introduction

Governing boards consisting of lay people have long been central to American Jewish organizations. Lay leaders who provide organizations with one or more of the legendary “three W’s” – wealth, wisdom and work – are highly respected by the larger Jewish community. In fact, research indicates that the high value placed by Jews on being charitable is related to their actual charitability. When studying philanthropic giving, Sirota & Alper (1988) found that being Jewish was the one characteristic associated with being a major donor.

Historically, board membership was a reflection of one’s elite social status and went hand in hand with philanthropic activity. According to Ostrower (1995) philanthropy “becomes a mark of class status that contributes to defining and maintaining the cultural and organizational boundaries of elite life.” Joining a board is therefore as much about status maintenance and prestige as it is about doing good.

Within the Jewish world, as in the general world, non-profit organizations are situated on a prestige hierarchy. Higher status organizations receive larger philanthropic gifts and an appointment to one of these boards is considered a status symbol. In her study of elite philanthropy, Ostrower found that educational and cultural institutions typically receive the largest gifts from donors and are therefore viewed as high status institutions. Universities, and particularly Ivy League universities, are the primary recipients of these donations.

However, Ostrower’s research also documented that among the three major religious groups, Jews are least likely to contribute to pre-college level educational institutions; while 44% of Catholics and 18% of Protestants give their largest philanthropic gift to a pre-college level school, only 8% of Jews do so. Research on the boards of major national Jewish organizations also found evidence for the

relative low status of Jewish educational organizations (Horowitz, Beck & Kadushin, 1997).

Nonetheless, over the past 30 years, federations began increasing their allocations to Jewish education. This occurred despite the dearth of major donors to pre-college Jewish educational institutions and despite these institutions' general lack of prestige. (Although a portion of this increase is attributable to concern about Jewish continuity, the major growth occurred prior to the 1990 National Jewish Population Survey's dissemination of the 52% intermarriage rate.) From 1957 to 1973, federation's total allocations for Jewish education increased from 10% to 21% (Wertheimer, 1997). By 1984, the amount allocated for Jewish education reached \$50 million, which comprised 26% of all allocations. (This represented a 45% increase for Jewish education as opposed to a 33% increase for all other local allocations).

Concurrent with Jewish education being catapulted to a more prominent position on the Jewish communal agenda, there occurred a surge of interest in governing boards. This increased interest is attributable to several factors that are affecting the Jewish, as well as the general, non-profit world – the most important being the increased competition for philanthropic funding. The escalating demand for the services provided by non-profits and the increased scrutiny of these organizations are also responsible for this renewed interest in governing board membership and activities (Axelrod, 1998).

When a blueprint for improving Jewish education, 'A Time to Act: The Report of the Commission on Jewish Education in North America' (1991) was published, special note was taken of the enormous potential represented by community based lay leaders who serve on governing boards. In fact, lay leadership development was

included as one of the five major elements in the overall plan to upgrade and revitalize Jewish education.

“A number of strategies will be developed to increase community support for Jewish education. Their aims are to recruit top community leaders to the cause of Jewish education; raise Jewish education to the top of the communal agenda; create a positive environment for Jewish education; and provide substantially increased funding... Top community leaders will be recruited individually to the cause of Jewish education by members of the Commission and other influential personalities who are able to convey the urgency of providing support for Jewish education.”

Nearly a decade has passed since ‘A Time to Act’ was published. The current study was prompted by the on-going belief that a strong partnership between involved and committed lay leaders and professionals is essential for improving the quality and raising the profile of Jewish education in America. The project’s ultimate goal is to expand the pool of people with talent and resources who are interested in Jewish education and are willing to serve as board members, funders, and in other lay leadership capacities.

II. Research Goals:

The research aimed to address the following goals:

1. To descriptively profile the current Jewish education lay leadership
2. To identify factors which motivate lay people to become involved and to remain productively involved with Jewish educational institutions
3. To identify challenges to effective board functioning
4. To recommend strategies for recruiting capable lay leaders, for sustaining their involvement in Jewish educational institutions, and for strengthening board functioning.

III. Methodology

The findings are based on forty-six structured, in-person interviews conducted with lay leaders in Cleveland, Baltimore, and Seattle. Each interview lasted for approximately one hour. The three cities were selected to represent different points in the continuum of American Jewish life. Baltimore represents an older, more established East Coast center of Jewish life, containing a large Orthodox population. Seattle, on the West Coast, has a smaller – but growing – Jewish community, with newer Jewish institutions. Cleveland, situated in the Mid-West, is known as an extremely philanthropic community containing a variety of Jewish institutions and a particularly committed laity.

To identify appropriate people to interview, we first contacted the director of the local Bureau of Jewish Education in each city (JECC in Cleveland; CJE in Baltimore and the JEC in Seattle). We requested a list of the key people who serve on the boards of local Jewish educational institutions. (We also requested to speak to individuals who were responsible for the Jewish educational portfolio within a Jewish institution whose primary purpose might not comprise Jewish education - a synagogue, for example).

The interviewed lay leaders included: day school presidents and board members; Hebrew (supplementary) high school presidents; presidents and board members of the local Bureau of Jewish Education; chairs of synagogue education committees, Jewish Community Center board members, and chairs of Federation education and allocation committees. Several of those interviewed also served on family foundations.

In all three cities, the largest proportion of those selected to be interviewed belonged to the local BJE board. Because the local BJE functioned as an umbrella organization in two of the cities, a large percentage of those interviewed also served

on the board of another local Jewish educational institution. In fact, many of those interviewed were active in more than one Jewish organization. Based on these multiple affiliations, it is estimated that the 46 people interviewed for this study were affiliated with approximately 120 different local and national Jewish organizations.

IV. Findings

Data Analysis and Data Presentation

This study's findings are based on information obtained from structured, open-ended interviews. The reader should keep in mind that those interviewed do not constitute a representative sample of people serving on the boards of educational institutions throughout the country. However, a systematic process was used to select the three cities (as previously reported) as well as the key informants in each of the cities. For the most part, the data are treated as qualitative, rather than as quantitative. The one exception is the profile section in which an attempt has been made to derive a demographic portrait of the nearly fifty board members who were interviewed for this study. Most of the findings presented in the results section consist of responses made by several people. (An attempt will be made to distinguish responses that represent a majority of informants from those that represent only a few.)

Because no prior research has been conducted in this area (to our knowledge), it is exploratory in nature. The short-term goal is to derive some basic hypotheses regarding the board members and the boards on which they serve. If deemed desirable, these hypotheses can then be tested at a later date using more empirical methods.

The major findings, which were culled from the interviews, will be presented in the following four sections:

- A: Board Member Profile
- B: Board Member Recruitment, Motivations for Joining Board, and Board Member Retention
- C: Board Functioning
- D: Major Challenges to Jewish Education

A. Board Member Profile

1. Demographics

Age

Interviewees' ages were estimated and then categorized. The categories consisted of the following three groups: ages 35 to 50; ages 51 to 65 and ages 66+. Although these were 'crude' categories, the determinations were not difficult to make.

Approximately 50% (25) of those interviewed were between the ages of 35 and 50 (most were in their mid 40's); another 30% were between 51 and 65 years old. The smallest category (15%) comprised those ages 66 and older. (This is not surprising since education is a major concern for parents of school-age children).

Gender

Women comprised nearly one-half (48%) of those interviewed. The proportion of women on these boards is extremely high, even for local organizations that tend to have a higher level of gender equity on their boards.

Gender by Type of Organization

In general, it appeared that the interviewed female board members were more likely to be found on the lower status synagogue boards and synagogue education

committees, whereas the males were rarely found in organizations on this level. Rather, men were more likely to serve on high power, higher status committees such as the Federation education allocation committee. These findings parallel those of Babchuk, Marsey and Gordon (1960). They found that the “most vital agencies had the highest operating budgets...The higher the rank of the board, the higher the status of its members”.

Gender by Age

In two of the three cities, the female board members were considerably younger than the male board members. It appears that in these two cities, at least, the new generation of Jewish educational lay people consist primarily of women. Although this can be perceived as a positive finding – especially in light of the typical gender inequity on boards –in reality, gender imbalance in the direction of a female majority can also prove problematic. In her book on women in the non-profit sector, Odendahl (1994) warned that:

“ as more women assume leadership positions in nonprofit organizations, they may carry their traditionally subservient family status with them...Regardless of class, the voluntary boards on which women hold leadership roles are often gender segregated. Except for national women’s organizations, these nonprofit boards on which women are equitably represented appear to be community based, with relatively small budgets and influence.”

Work Status

Most of the interviewed women were either working or had taken some time off to be with their young or school-age children. Most of the younger women held advanced or professional degrees. A handful of middle-age women were full-time volunteers. Several of the older men were retired, while all the younger men were employed. The high level of working women paralleled the findings of a study concerning the board members of national Jewish organizations (Horowitz, Beck, Kadushin, 1997). That study found that younger women (age 52 and under) were twice as likely to be employed full-time (both salaried and self-employed) as the older women (age 53+). Since women have traditionally represented the backbone of a board’s workforce,

the increased proportion of working women on the boards will have a considerable impact on board functioning. Specifically, it will result in fewer women being available for 'board work' and for fewer hours.

Jewish Background

The large majority of the board members who were interviewed had a minimal Jewish background, typically consisting of several years of study in a supplementary school. Few received any formal Jewish education subsequent to their bar/bat mitzvah. However, many board members had taken advantage of the multitude of locally available learning opportunities to enhance their Jewish knowledge. A few of the board members had single-handedly funded Jewish learning programs and educational experiences in their communities.

Wexner Heritage Program Graduates

One-quarter (12) of those interviewed had participated in the Wexner Heritage program. Wexner program graduates were unanimous in their enthusiasm for the program. The most superlative terms were used to describe the program: "Wexner was fantastic"... "it brought Jewish life to be the central focus of my existence", "it made a tremendous impact on my life" "my kids would not be in a Jewish day school if not for Wexner" and "the Wexner program helped me to embark on my own Jewish educational journey." Most importantly, the Wexner graduates credited the program "being the catalyst" for their increased communal involvement as well as their quest for Jewish knowledge.

Jewish Education Received by Board Members' Children

Nearly 40% (18) of those interviewed have provided their children with a more extensive Jewish education than they themselves had received. The other 60% are providing (or have provided) their children with a level of Jewish education that resembled their own Jewish education - either within the Jewish day schools or supplementary schools. Fifty percent (24) of those interviewed with school-age children, enrolled their children in Jewish day schools. In addition, three of the older

interviewees who had not sent their children to day schools reported that their grandchildren who currently attending day school.

In general, younger board members appeared especially concerned about the quality and extent of their children's Jewish learning experiences. This concern among the younger generation probably reflects the enhanced value that they place upon Jewish learning and also the larger number of available learning opportunities.

2. Career Paths and Aspirations

Local and National Lay Career Paths

For most of those interviewed, involvement on the boards of local educational institutions represented their first Jewish board involvement. Many board members subsequently became involved on other local boards, typically the umbrella Jewish educational organization (JECC in Cleveland or CJE in Baltimore or the JEC in Seattle) or the local federation.

When queried, the majority of those interviewed asserted that they did not aspire to hold "higher" lay positions. Few board members were interested in serving on national boards. As one active local board member stated, "My focus has been local and will probably continue to be because I feel that I can make a difference on that level". Others who preferred remaining local in their lay involvements reported that they enjoyed the "hands-on" nature of local involvement more than the politics that are perceived to be endemic to national organizations. A handful of those interviewed had served, are or currently serving, on national boards. One disgruntled former national board member provided the following critique of this experience: "voluntary work on the national level was a lot of talk and even less action."

The few lay leaders who expressed an interest to become involved on a national level did not appear very knowledgeable about the national Jewish organizational world. In fact, despite their apparent lack of ambition, one wonders whether these particular

board members are indeed uninterested in pursuing 'higher office' or alternatively, lack the information and skills required to achieve this kind of mobility. For example, several of those interviewed possessed strong board development or leadership skills. They mentioned that given their 'skill-sets' they were surprised that they had not been approached by other Jewish organizations, including those on a national level. However, these talented board members had apparently not considered approaching these organizations – directly or indirectly – to inform them of their interest and availability.

Volunteer to Professional Career Path

The research identified an unusual, and perhaps new, career path within the Jewish organizational world. Six (25%) of the interviewed board members (all women) had first become involved in the Jewish world as volunteers. During the course of their involvement they acquired or sharpened specific skills that enabled them to obtain full-time paid employment in Jewish organizational settings. At the time of their interview, they were actually wearing two hats: that of a Jewish professional and of a Jewish lay leader. These individuals appeared to be experiencing role enhancement rather than role confusion. One stated: "If I did not have the professional involvement I would not have so much access and would therefore not experience the same level of gratification." (Interestingly, this trend did not apply to any of the men who were interviewed).

3. The Role of Jewish Learning for Lay Leaders

Opportunities for Personal Transformation Provided by Jewish Learning

Involvement in Jewish learning has led to a personally transformative experience for some board members. Although the actual consequences have varied, overall, Jewish learning has resulted in an increased feeling of confidence about themselves as Jews among the lay participants. Looking toward the future, one board member stated, "once those involved in Jewish education have the tools to learn more, their personal esteem as well as their esteem for Jewish education will increase."

Growth of Jewish Education for Lay Leaders and the Need for Expanded Jewish Educational Opportunities

Because most lay leaders did not receive extensive Jewish education when they were growing up, they appreciate Jewish learning opportunities. Several board members noted with amazement how their peers “have come a long way” in their own Jewish education as witnessed by the number of lay people who have voluntarily given a “dvar torah” (torah talk) at a board meeting or board retreat. Another board member stated, “The ship is beginning to turn. Jewish leadership is not as delinquent about being Jewishly educated as it used to be.” According to yet another board member: “Jewish lay leaders want to study Jewish texts. They admit to being Jewishly ignorant. They are interested in taking a serious look at issues they are facing and making Jewish texts relevant to these issues.” Those lay leaders that have become more Jewishly educated often decry that “Jewish lay people have a level of Jewish illiteracy that they wouldn't tolerate in the secular world.”

Despite – or possibly because of – the Wexner program's apparent success in combating this illiteracy, Jewish learning oriented lay leaders maintained that similar learning programs need to target even larger numbers of lay leaders, especially in the major cities. In the words of a Wexner graduate: “Although there is a confluence of Ex-Wexner people on Federation's education front, there is a need to have five times as many people with that background. For example, although there were eighteen Wexner participants in Baltimore that is not sufficient mass for a city of that size.”

The Parameters of Lay Leadership Education

Although board members claimed to want more Jewish knowledge, intensive, long-term study did not appear to be the type of Jewish educational experience they preferred. As one lay leader remarked, “just how much Jewish education will Jewish leaders subject themselves to?” Another board member stated: “Because Jewish lay leaders have such a superficial Jewish background, they cannot begin

to imagine how deep it can be and how intellectually rigorous it can be. However, Jewish learning is still too peripheral to their lives. Therefore, at this point, when they participate in Jewish learning they want charismatic leaders who can provide entertainment as well as education.”

The Role of Perks in Lay Leadership Education

Lay leaders were particularly fond of the perks these programs provided such as opportunities to meet lay leaders from other cities and trips to Israel as well as to American retreat centers. When Baltimore attempted to launch a learning program that lacked these perks it did not prove successful and experienced a high attrition rate.

B. Board Recruitment, Motivations for Joining Boards and Board Retention

1. Board Recruitment

Identifying Talented Leadership

There was general consensus among those interviewed that in cities with a substantial Jewish population there are many people who possess the potential to be exemplary lay leaders. The challenge is to identify these talented individuals and then to recruit them to communal institutions. In general, two “types” of people are on the “short list” for board membership: members of well-known (usually philanthropic) families or those who already serve on other Jewish boards of directors. In reality, these two types are often recruited from the same pool.

To expand the pool, a more systematic as well as a more expansive recruitment approach is advocated. The more systematic approach involves having institutions compile a community wide database containing a comprehensive listing of people’s skills and qualifications. By collecting this information, a nominating committee will be able to use these profiles to identify individuals whose skills match the skill requirements of a given organization’s strategic plan. For example, if the strategic plan calls for an expanded marketing effort then the board’s

nominating committee can search the database for individuals with marketing skills.

The 'inclusive' approach refers to targeting a wider population of people, especially beyond those already on the "inside". Thus, there are Jewish women and men serving in both professional and lay positions in general (non-Jewish) non-profit organizations who might have the requisite skills for serving on a Jewish educational board. In addition, several lay leaders emphasized the importance of recruiting well-known and highly regarded people from the community to serve on these boards. The involvement of high status individuals will lend both legitimacy and acceptability to joining the boards of educational institutions.

Recruitment issues are different in cities with smaller Jewish populations, such as Seattle. In these areas, people expressed concern about the size of the existing talent pool. One board member worried about the dearth of lay leaders and suggested that, "Jewish educational institutions reach into the congregations and schools to identify and train future leaders."

Targeting Adult Learners

Another way of widening the recruitment net is to target people who have become involved in Jewish learning as adults. Many of these individuals have only recently begun to recognize and appreciate the benefits of Jewish education. Adult Jewish learners are often extremely motivated and enthusiastic and therefore represent a potential fertile pool of lay leaders. Based on the findings of this research, it does not appear that any systematic effort is being made to identify and educate adult Jewish learners about the larger Jewish community and specifically its educational infrastructure.

2. Motivations for Joining Boards

To Maintain a Tradition of Family Involvement

Our research found that people become involved in Jewish educational institutions for diverse reasons. A substantial number – though not the majority – of the younger (between age 35 and 50) lay leaders, had a family history of philanthropic involvement. A larger proportion of the respondents reported that their families of origin had been civic-oriented, despite the fact that they were not major “givers”.

Although many board members from well-known families were drafted to serve on boards, others took a more proactive approach. One individual, from a communally involved family, carefully researched various options before choosing to join a board of an organization that provided him with the type of “hands-on” experience he was seeking.

To Insure a Quality Jewish Education for their Children

Many of the board members first became involved with the particular institution when their school-age children were enrolled in that particular institution. As one board member asserted “parents tend to focus where their kids are.” Several of those interviewed mentioned that through their board involvement they were able to “play a continuing role in their family’s life and development.”

To Continue their Involvement with Jewish Education

As mentioned above, one-quarter of those interviewed had participated in Wexner and credited the program with inspiring them to be involved in Jewish education on a communal level. Others expressed pride in the quality of their own formal Jewish educational experiences or had been “turned on” by a specific adult Jewish educational experience (other than Wexner). For example, one board member with a minimal Jewish educational background described how Aish HaTorah recruited him for a Torah study course. “Although I originally began learning as “an intellectual exercise, I soon began relating to Judaism as a personal experience

with meaning consonant with my own worldview.” Another board member said “being involved in Jewish education gives me balance, adds something to my life and shows me that there is a purpose to it.”

To Act on their Sense of Jewish Communal Obligation/ To Fulfill a Mitzvah
Despite the deeply Jewish nature of their communal involvement, only one board member, when asked about the impetus for his voluntary activities, stated “I do it because it’s a mitzvah! Many of those interviewed, however, mentioned their strong sense of communal responsibility. In fact, quite a few of the communal leaders reiterated their credo that it is “wrong to say no when you are asked”.

One respondent was motivated to become communally active after suffering a near fatal heart attack while in his 40’s. He reported that this event precipitated a re-evaluation of his entire life direction. Consequently, he committed himself to doing charitable work in the Jewish community.

3. Gratifications Derived from Board Involvement

Personal Jewish Gratification

On the whole, the board members felt extremely gratified working on Jewish educational issues. Statements such as: “the experience has enhanced my Jewish identity”, “I’m on my own journey of Jewish education & feel that it’s important to be involved in things I’m passionate about” and “I feel better about myself because I am in a Jewish environment several times a week” typified these reactions.

Their association with Jewish educational institutions has provided board members with many opportunities to engage in Jewish learning. Some of these opportunities are open to all community members (e.g. courses at the Colleges), while others are more exclusive in nature (e.g. Wexner, Jewish learning conducted at board meetings). Many board members expressed the belief that they have grown Jewishly through participating in these learning experiences. Some board

members have pursued Jewish learning on their own after they completed the initial program of study.

Gratification of Providing Positive Jewish Educational Experiences

Despite the heavy workload and frustrations often associated with voluntary organizational work, the board members say that they feel it is all worthwhile when they see the impact of their work on their children and on other children as well. As one board member said: “seeing my kids and their friends loving to be Jewish keeps me going.”

Gratification of Being Involved in a Successful Endeavor

People enjoy being a part of a successful endeavor. Board members who were involved in the establishment or in the significant expansion of Jewish schools described feeling a particularly strong sense of accomplishment. One interviewee stated “ I feel it is both fun and rewarding when our organization is running well, meetings its budget and expanding and when there is a good group of people to work with.” Another person described a particular high point as occurring when “the light-bulbs go off... such as what happens when people interrupt each other because they are excited about what they’re doing.”

4. Board Retention

When queried, few lay leaders mentioned problems relating to board member attrition. It appears that the same set of factors that propel people to join boards also motivate them to remain on the boards. The issues relating to board retention are less related to keeping members from “dropping out” than with productively engaging them on an on-going basis.

A related issue is the inequitable distribution and assumption of board responsibilities which can lead to board member burnout, especially among talented board members who are also extremely generous with their time. As one such board member stated “you can’t always take from lay leaders until they are sucked

dry. The Jewish community needs to give something back to lay leaders so that they feel rejuvenated by their efforts...perhaps that something is Jewish learning.”

Burnout typically occurs when a small number of lay leaders assume the lion's share of board work. When asked, for example, how many hours they devote to their board related activities, most lay leaders reported that they spent approximately 3-5 hours per week on board related activities. However, a small percentage (mostly board presidents) reported spending approximately 20 hours per week. This kind of extreme imbalance reflects a poor distribution of board work (or talent deficits in specific areas) and is ultimately detrimental to organizational functioning. (Some strategies for addressing this problem are discussed in the following section).

C. Board Functioning

1. Problem Areas

Among board members, there is a wide range of recognition of existing organizational problems. While some organizations appear to recognize and address problems before they wreak havoc, others tend to be more crisis driven. Several boards that have identified specific challenges and issues that need to be addressed, are beginning to look for outside assistance, often in the form of board development and consultation. (Board members of Orthodox institutions appeared to be the least critical of how their boards were functioning.) Information obtained from the interviews suggests that there are three major problem areas facing boards. These problem areas relate to board structure, board processes, and board values.

Board Structure

According to one board member “many lay leaders have the necessary skills but don't always have the opportunities to apply them.” Because of the sheer number of people on many boards and the cumbersome ways many boards are structured, it is often difficult for members to feel that they are getting anything accomplished. Board members were especially critical of the governance process characteristic of

the large umbrella Jewish educational organizations. One leader declared that this type of board is “totally unworkable”, while another stated, “a board’s upper limit should be 17 and not 30.” Lay leaders serving on very large boards remarked that they often felt as though they were “rubber stamps” and did not believe that they were having an impact on the organization.

The lack of an existing committee structure on many boards is also regarded as problematic. The implementation of committees is regarded as a strategy to promote greater board involvement, which then helps make the board more dynamic. A related structural issue concerns the lack of a clearly defined line of succession, including grooming for insiders for top-level positions. Such a ‘line of succession’ is necessary to motivate talented people to remain active on the board.

Board composition is another structural issue confronted by many boards -especially school boards. Among those interviewed there was a consensus that boards need to expand beyond parents of children currently enrolled in the school to include non-parents. This view is based on the belief that because parents have so many vested short-term interests related to their children’s schooling, they are often not well equipped to deal with long range and strategic planning decisions.

Board Processes

Most of those interviewed expressed extreme dissatisfaction with the board process (which is often related to the structural difficulties described above.) The process was described as “too bogged down”, “preoccupied with the trivial” and “lacking the big picture.” One board member stated, “It is a particular challenge to keep the board meetings and the board process active & dynamic, since most of the major issues are resolved before they reach the board.” Another remarked “I find it frustrating when the Executive Committee does most of the board work because lay leaders want to believe that their involvement is meaningful and their time is well spent.” Yet another one complained that “the meetings are just too long and excruciatingly slow.”

To improve board functioning, experts have advocated introducing professional standards to board positions and board activities. These standards include: creating job descriptions for board members with specific committee assignments, limiting the number of unexcused absences and implementing job-related evaluation criteria. The evaluation protocols would be used to evaluate all professionals, all boards members, committee heads, board officers and the board president. Although board members recognize the potential benefits of introducing tougher standards, they also expressed some trepidation about moving in this direction. Their concern relates to both the actual costs of implementing these changes and to the possibility that introducing such stringent standards might deter talented individuals from assuming board positions.

Values

The values underlying the boards' activities and relationships were also the target of criticism. Three areas pertaining to values were singled out as particularly problematic: the lack of mutual respect evidenced by board members' behavior; the lack of confidentiality regarding sensitive information, and the excessive respect accorded to wealthy people on the board. Several board members suggested addressing these problems through a study of Jewish values.

The issue relating to compromised confidentiality is especially difficult because it straddles all three areas of board functioning. Breaches of confidentiality represent lapses in an organization's process and values and also reflect the overlapping social networks that characterize many Jewish communities. For example, it is often difficult to maintain confidentiality when the group of people who serve on a day school board also attend synagogue together and, in addition, reside in the same neighborhood. Or in the words of one board member, "We're all a family and in a family we know each other's dirty laundry." This lack of boundaries contributes to informational leakage. When this happens, board members become

increasingly reluctant to express themselves truthfully at meetings, which is clearly detrimental to board functioning.

Long-term Vision

The development of a long-term vision, often through a formal strategic planning process actually spans the above three categories, rather than fitting neatly into any one of them. According to board members, having a long-term vision provides an organization with a solid agenda that enables it “to focus on the larger issues rather than on putting out the immediate fires.”

2. Relationship Between Board and Professionals

For Jewish educational institutions to function effectively, there needs to be a smooth working relationship between the board and the staff. This relationship is often contingent upon clear role definitions. The major problems endemic to lay-staff relationships can be characterized by the antipodes: excessive micro-management of staff activities by the lay leaders or professional over-involvement with the organization. This problem is definitely not unique to Jewish educational institutions. In his book ‘Boards That Make A Difference’ (1997). John Carver quotes the management expert, Robert Gale who observed “One of the key problems is that many boards are either too weak to accomplish anything or so strong they wind up managing the organization.” Depending on the particular board-staff dynamic characteristic of their institution, the board members interviewed for this research provided examples of both extremes.

Micro-Management of Organization by Board Members

Many lay leaders recognized that Jewish educational institutions are often heavily lay lead to the extent that board members are involved in an institution's day to day functioning. The lack of role definition and boundaries between board and staff (which often coincide with the boundary overlap issues described above) often contributes to the board assuming the “management” role. This, in turn, can result

in the staff's feeling un-empowered and undervalued and to the general feeling, often expressed by Jewish professionals, that they are "not being treated well" by the lay boards.

Several of those interviewed described a "founders' syndrome" that often results in board over-involvement. This occurs when a few people have raised the money to fund the institutions themselves and therefore believe that they have the power to mandate how the institution should operate.

Professional Over-Involvement in Management of Organization

Several board members (typically involved on the boards of long-standing day schools) reported that the power of their institution did not reside with the board but rather with a powerful school director. Some lay leaders admitted that due to their own feelings of inadequacy regarding Jewish education issues, the board functions mostly in an advisory capacity and relegates most educational policy decisions to the professionals. (Among other problems that can result from leaving the board 'out of the loop' in this manner, is that the board receives insufficient information about how the institution is functioning.)

Towards a Collaborative Board-Professional Governance Model

More recent theories and guidelines for improving the relationship between boards and staff (Carver, 1997; Axelrod, 1998) advocate the development of a more collaborative relationship but with distinct roles for each. In the governance model recommended by Carver, the board assumes a results oriented, strategic leadership role that (among other functions) requires it to: establish an outcome based mission, adopt a long-term viewpoint, serve as the repository of organizational values; engage in creating rather than approving and most importantly, clarify those aspects of management that need tight versus loose control.

Those interviewed described their own visions for an improved board-staff relationship. For example, one board member remarked, "Without sufficient professional support the board cannot do their job. The professionals need to prepare lay leaders with input in the form of written materials and speakers. The lay leaders should then use this input as the basis for their decision-making." Another lay leader said, "The boards should identify needs but not come up with the answers."

One professional Jewish educator commented that the lay-professional problem is rooted in both parties being inadequately trained about the parameters of their own roles and about their relationship to one another. The role confusion is further exacerbated, according to this professional, by the inappropriate public school administration model taught to Jewish school administrators in education graduate school. This model was deemed inappropriate because administratively most independent Jewish schools do not resemble public schools. Instead, Jewish schools resemble colleges and therefore require that administrators be able to both 'manage out' (e.g. be in charge of the physical plant as well as capital and board related issues), as well as "manage in" (supervise staff). This suggests that the professional administrators would also benefit from receiving additional training regarding the nature and scope of their job.

3. Board Development and Board Training

Although there exist many models of leadership development, they all seem to address the following question articulated by a lay leader: "although there are some people who are born leaders, and others who are very shy and quiet will probably never succeed at being leaders, how do you take the vast majority non-(non-genetic leader type) people in the middle and train them to be competent leaders?"

Formal Leadership Training

Our research indicates that almost every lay leader had participated in some type of leadership training. However, because this training was often generic as well as abbreviated in nature, it did not necessarily result in improved board functioning. For example, in Cleveland, the leadership training provided by the Federation focuses mostly on Federation funded organizations and on the issues facing the local community. It does not specifically address issues such as meeting facilitation skills, optimal board structure, optimal board size, or developing a plan for leadership succession. (Despite this absence of training provided by the organizations, on every board there are some board members who take the initiative to seek out whatever training is available.)

Furthermore, rarely, if ever, did formal board training figure in a board's annual plan. Several organizations have sub-contracted, on a more ad-hoc basis, with consulting firms that provide board training. However, this form of training is usually very abbreviated and also quite infrequent (e.g., 3 hours once every 3 years). Only two organizations reported that they are currently engaging in a serious board development effort with the assistance of a professional board development organization. On the whole, governing boards appear to be ambivalent about allocating institutional resources for leadership development and board member training which they do not regard as current priority areas.

Informal Training/Mentors

Board members had different conceptions of what constitutes a good leader. While some maintained that a good leader is "genetic" and cannot be taught most people referred to leadership as a set of learned behaviors. For example, one board member stated: "Being a good leader is knowing when to speak and when not to speak."

Upon embarking on their "lay careers", no board member reported having had a board appointed mentor. However, many lay leaders recalled having an informal

mentor relationship with a more experienced lay leader who “taught them the ropes”, often in lieu of a formal, board sponsored, orientation and training program. A substantial number of lay leaders said that they have served as informal mentors to the next generation of lay leaders. Most of those interviewed advocated instituting more formal board training supplemented by an informal (mentor-like) “buddy system”, especially for first-time board members.

D. Major Challenges to Jewish Education

Approximately one-half of the lay leaders who were interviewed were asked what they considered to be the ‘major challenges facing Jewish education.’ When the responses were reviewed and coded, the following major categories were the most frequently mentioned.

1. Lack of Proper Funding

The major problem identified is the continued under-funding of Jewish education and Jewish educational institutions. Money is needed to train and recruit quality teachers, to improve the physical facilities and to make insure that schools have adequate administrative staff.

2. Lack of Quality Teachers and Administrators

The lack of well trained, competent Jewish educators and administrators was mentioned over and over again. The perception among lay leaders is that teachers appear to be trained either in content or in pedagogy, but rarely in both. Furthermore, the scarcity of talented teachers then drives up the cost of the ‘good’ educators.

3. Lack of Respect (“Yichus”) for Jewish Educators and for Jewish Education

The lack of communal respect for education in general and Jewish education, in particular, is perceived as a major obstacle to upgrading the status of, and funding

for, Jewish education. As one leader remarked “This problem will undoubtedly persist until children can be encouraged to pursue careers in Jewish education.”

4. Lack of Understanding About How to Improve Jewish Education

Although an increasing number of lay leaders have accepted the premise that Jewish education is important, few appear to have seriously explored how to improve Jewish education. In the words of one board member “The greatest problem is a pedagogical one: how to reframe what we want people to know.”

There has been a frustrating inability to plan with a total community perspective in mind. The leadership needs to more broadly define Jewish education to include informal educational experiences such as retreats, summer camps, trips to Israel and celebrating Shabbat.”

5. Lack of Professionalism on the Boards

Poorly functioning, undynamic, boards lacking in decision-making authority were identified as problematic by a large number of lay leaders. Board members expressed frustration at unclear board expectations and felt that the collective board wisdom was not being tapped. Board members who did not respect the confidential nature of board discussions and members who “didn’t know when to talk and when to stop talking” were also singled out for criticism.

6. Lack of Jewish Knowledge Among Lay Leaders

Despite the increase in Jewish learning, many lay leaders were disturbed that important decisions pertaining to Jewish education continue to be made by “people who are Jewishly ignorant and who don’t recognize the importance of Jewish education.” According to those interviewed, this situation is the consequence of Jewish institutions deferring to people who contribute the most money. In the words of an interviewed board member, “Unfortunately, there is a long tradition of American Jewish lay people deriving their Jewish identity primarily from their philanthropic activities rather than from their Jewish knowledge.

7. Poor Fiscal Management of Educational Institutions

Against the backdrop of the recognized, overall, funding inadequacy for Jewish education, several lay leaders raised questions about the quality of some institution's fiscal management. For example, one board member referred to the schools' "insatiable need for dough", while another asked "Has someone ever figured out what percentage of the cost of Jewish education goes to educators?", while another asked "Can we ever give the schools enough money?" Similarly, some fiscally knowledgeable board members questioned the level of budgeting and accounting expertise possessed by the administrators who perform these functions.

V. Recommendations for Attracting Lay People to Jewish Education

1. Convince Laity of Importance of Judaism and of Jewish Education

Before American Jews 'buy in' to Judaism and to Jewish education, they must first be convinced of its importance and the benefits to be derived from their involvement. To accomplish this, lay leaders suggested undertaking a well funded educational campaign. As one lay leader said, "You must bring in lay people, one by one and try to connect with them by finding something Jewish in their heart and by showing them that there is joy in being Jewish ("Joie du Juif")."

2. Recruit Prestigious, Creative and Interesting People to Serve on Boards

Do what other non-profits do: recruit high profile, high status people in the community to the boards to indicate to others that it is socially acceptable to be involved. Recruiting people with "cachet" will create a club-like experience where people will look forward to attending meetings. The growth of adult Jewish education has created other arenas within which to find potential lay leaders.

3. Create a Long-term Institutional Vision

Each organization needs to create a clearly articulated mission that focuses on long term issues and that would provide a solid institutional agenda. This vision is often developed through an in-depth strategic planning process. This will help to create a board on which, goal oriented, meaningful work is being done.

4. Implement Professional Standards for Boards and Board Members

Jewish board members bring very high levels of both professional and academic accomplishments to their board work. Therefore, the voluntary boards on which they serve should also adhere to high professional standards. The interventions required to raise these standards were championed by the interviewed board members who asserted that "if expectations are specified, people will rise to the occasion." If necessary, professional board development experts should be

engaged to accomplish this goal. Among the changes that need to be made are the following:

- Institute more formal recruitment procedures based on database containing community qualifications
- Establish clear job definitions, including committee assignments, for all board members
- Provide extensive orientation to all new board members
- Compile a Board Orientation Book containing important board and organizational documents (e.g. policies and guidelines, by-laws, personnel guidelines, teacher contracts, board roster, meeting calendar, board expectations, organizational mission statement, etc.s
- Provide training in specific process skills (e.g. meeting facilitation, conflict negotiation)
- Identify and groom insiders for future leadership positions
- Establish strategies for leadership development
- Develop criteria for evaluating overall board and board member job performance

5. Design a Lay Leadership Development Program

In the course of the interviews, lay leaders actually faulted themselves for “not seeing the big picture.” This is not really surprising given the extent to which each community -- and often each institution within a community -- functions in isolation. It is therefore important to provide lay leaders with structured opportunities to interact, to share information, to acquire additional Jewish knowledge, and to learn about the larger issues in Jewish education and in American Jewish communal life. This would also represent a strategy for “giving something back to them”, as suggested by one of our key informants.

VI. Conclusions

As Jewish education assumes a more prominent place in the Jewish communal agenda, increased attention is being focused on the individuals who support Jewish educational institutions by serving on their boards of directors. This study found that the boards of these institutions are populated by a cadre of intelligent, professional and committed women and men who give voluntarily and generously of their time. The lay leaders' communal involvements are often intrinsically related to their own personal Jewish journeys. Many of these individuals came to Jewish learning as adults, a substantial number through the Wexner Heritage Program. Though their personal and denominational backgrounds vary, the profiled leaders share a devotion to promoting Jewish education as the foundation for life long learning.

The research indicates that despite the high caliber of most board members, their talents and skills are not maximally utilized by the boards on which they serve. Those interviewed identified a range of difficulties related to board functioning and their adverse impact on the organizations.

At this important juncture, it is critical that problems be addressed by imbuing all facets of Jewish educational organizations with more stringent and professional standards and by insisting that all educational endeavors articulate a clear vision. The retention and productive involvement of this generation of lay leaders is contingent upon such changes taking place as is the entire enterprise of revitalizing Jewish education in America.

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Adam Gamoran
1180 Observatory Drive
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April 21st 1999

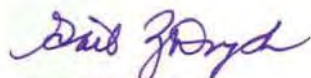
Dear Adam,

In 1998, CIJE conducted a review of some of the synagogue change initiatives in North America. The study was done by Dr. Lisa Malik and supervised by Karen Barth, Director of CIJE and was funding in part by a grant from the Nathan Cummings Foundation. The enclosed document is a first iteration of this review.

The review was originally intended to be the first step in a broader study. However, in the course of the transition in which the CIJE has become an operating program of the Mandel Foundation, we have determined that this particular project will not be part of our 1999 workplan. Nonetheless, we feel that those individuals and institutions who cooperated so graciously with us in the early stages of the project should have access to the information gathered, and are therefore pleased to provide you with a copy.

Again, thank you for your cooperation. Any informational questions you have regarding the report should be directed to Lisa Malik, lisamalik@compuserve.com. If you have further suggestions and comments about continuing this research project, contact Rachel Cowan at the Nathan Cummings Foundation, 212-787-7300.

Sincerely,



Gail Z. Dorph
Senior Education Officer