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67

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11

Experiment in Congregation Education [ECE]. Correspondence  
and proposal, 1993-1994.

For more information on this collection, please see the finding aid on the  
American Jewish Archives website.

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From: EUNICE:"iaron@eis.calstate.edu" 25-NOV-1993 16:47:43.29  
To: gamoran  
CC:  
Subj: RE:a new wrinkle

Hi Adam,

Happy Thanksgiving! I haven't had a chance to get to the phone since the meeting of ECE consultants and research team leaders on Monday, but I wanted to alert you of a new development: At our meeting, we revised several key aspects of our project, including the role of the research team leaders. It's hard to summarize here, but suffice it to say that we have some serious questions as to whether Roberta can now serve in this capacity, since it involves more intervention and less disinterested research. Roberta and I are still hoping to salvage a part of the role and save it for her, but there are many details to be sorted through before this decision gets made.

In any case, I wanted to alert you that even if Roberta can participate in our project, from either your standpoint or ours, we're probably talking about less than 20 days a year.

I think there might be a number of creative ways to involve Roberta in our project, but I can't yet spin them out fully. Sorry I can't be more definitive at this point, but I thought I should alert you a.s.a.p. You can e-mail your response, or, if you want to talk -- I'll be at home on Monday : 213-939-9021. Even if I don't hear from you, I'll call you to discuss it further, once I have all this sorted out (probably not for a few weeks)

Isa



From: EUNICE:"iaron@eis.calstate.edu" 2-DEC-1993 09:38:51.65  
To: gamoran  
CC:  
Subj: RE: RE:a new wrinkle --part 2

Hi Adam--

Don't have a lot of new details yet, but the main idea of the change is that the Research Team Leader's role needs to be re-thought to include more advising to the congregation (all the congregations requested this, and argued convincingly that they need it), therefore less research. We made many budgetary changes, and I'm hoping that by buying more time of the RTL's (from 20 days to 25 or 30 -- IF I can find it in the budget), we will still have a reasonable research component.

Unfortunately, I won't get to work on the budget for 2 weeks.

Alan called me yesterday from Israel, on another matter, and we discussed the situation briefly. We agreed that we shouldn't give up yet -- that a connection between our project and the CIJE is important to both of us. You, Alan and the others need to think through how "contaminating" it would be to have Roberta be an adviser as well as a researcher. A second alternative is for the CIJE to assign Roberta to do only research -- possibly also in Atlanta, which MAY be one of our congregations.

All of this is very fluid -- requiring lots of discussion at your end, and (prior to that) some more clarity from my end. I will begin revising the protocol next week, and will send you and Alan copies as soon as it is done.

Sorry to have thrown a monkey wrench into the whole thing -- but I guess that's what this process is all about.

Happy Hanukah. It's nice to be back in regular contact with you.  
Isa







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December 27, 1993

Professor Adam Gamoran  
University of Wisconsin at Madison  
Center for Educational Research  
1025 Johnson Street  
Madison, WI 53706

Dear Adam,

Enclosed, finally, is a copy of the latest revision of the "ECE Protocol and Description." Of special relevance to the CIJE, and our ongoing discussion of Roberta Goodman's participation in the ECE, are two important changes:

- The ECE will no longer require the congregation to have a separate research team. Research gets folded into "critical reflection" activities undertaken by the task force, and is the responsibility of the ECE adviser to write up.
- The title "Research Team Leader" (the ECE staff member assigned to work with the congregation) has been changed to "Adviser," to reflect a greater emphasis on offering support to the congregation, and a lesser emphasis on research.

These changes respond to the congregations' requests to make the project more affordable, in terms of both money and person-power.

One more important piece of information: we have decided not to work with an Atlanta congregation.

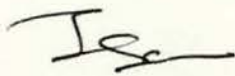
I'm hoping you, Alan, and the others, will be able to decide on whether or not Roberta can be assigned to this project within a month or six weeks. Two possibilities suggest themselves:

- a) that you assign her solely as a researcher, and we hire an additional advisor for Milwaukee; we could then negotiate the percentage of Roberta's time to be spent on this project.
- b) that you decide that the functions of "adviser" and "researcher" can be intermingled; this might demand a bit more of Roberta's time, perhaps 30 days a year, instead of 20, as originally thought.

In making this decision, I know that you'll be thinking, first and foremost, about what's best for the CIJE. I do hope, however, that you'll bear in mind the arguments that made you willing to consider sharing Roberta with us in the first place: it would *still* be important for the CIJE to study an example of transformational change at the congregational level; and it would *still* be good for our two acronyms (CIJE and ECE) to work on a joint project.

If there is any additional information you need from me, please let me know.

B'Shalom,



Isa





**The Experiment in Congregational Education**  
Description and Protocol -- Draft 3  
*Tevet, 5754*

**What is the Experiment in Congregational Education?**

The Experiment in Congregational Education (ECE) is a project undertaken by HUC - JIR's Rhea Hirsch School of Education (RHSE) in cooperation with the UAHC Commission on Jewish Education. The ECE will bring together a small number of Reform congregations (between four and six) to re-think and re-structure the *full* range of their educational programs, as they affect *all* age groups. Its ultimate goal is to widen the definition of education in the congregational setting, and to assist congregations in their efforts to transform themselves into learning communities.

**What Values and Beliefs Underlie the ECE?**

Central to the project are a number of beliefs about the nature of *congregational education*, and the value of experimentation:

We see the *congregation* as the primary Jewish community for Reform Jews. The congregation's mission is to provide opportunities for its members to participate more fully in *Torah* (learning), *Avodah* (worship), and *G'milut Hasadim* (acts of kindness and justice), the three pillars of the Jewish Tradition. In the Jewish Tradition the study of *Torah* is seen as both an end in itself (*Torah lishma*) and as a vehicle for a number of inter-related goals: enriching the Jewish lives of individuals; creating and sustaining a sense of community; linking local communities to one another and to the Jewish people as a whole.

Every aspect of the congregation's life, from services and sermons to fundraising and management, is a potential arena for the study of *Torah*. Too often, however, **congregational education** has been limited by the assumption that it should consist primarily of schooling for children. In recent years the importance of education has become evident, not just as a foundation for adulthood, but as a life-long activity for committed Jews. Congregations today face the challenge of re-thinking and re-designing their educational programs to increase the level of *Torah* study for all members. This process will require the involvement of key congregational leaders, and of representatives of the full spectrum of the membership as well.

This attempt at self conscious re-conceptualization of education in Reform congregations represents a departure from previous efforts at Jewish



educational reform. In choosing to participate in this project congregations are entering uncharted territory; neither the process nor its results can be fully predicted ahead of time. Thus, the title "*Experiment* in Congregational Education." Among the consultants to the ECE are nationally known experts in organizational and educational change, as well as congregational leaders who are engaged in similar attempts at re-configuration. Even so, the ECE's approach to reforming congregational education is, as yet, untested.

There is a second reason for our use of the term *experiment*, and that relates to the critical role of research in this project. Too often in Jewish life, changes are initiated without any provisions being made for documentation. Thus, whatever the project's outcomes, outside observers (and even the key actors themselves) are no closer to an understanding of the change process or the determinants of success than they were before. The ECE has been designed to assure that what transpires in the participating congregations (both process and outcomes) will be studied, and that the insights gained from these experiences will be available to congregations which attempt similar reforms in the future.

## AMERICAN JEWISH

But while research is central to the ECE, the kind of research to be conducted is different from more conventional social science research, in which outside observers collect and analyze the data. Congregations which join the ECE will engage in *participatory action research*, in which the professionals and members of the congregation will participate in the research effort. Proponents of participatory action research, which is relatively new (though increasingly popular) in the field of education, claim that it has three important advantages over more conventional research: First, by participating in the process of research, those attempting change are provided an opportunity to reflect critically on their activities. Second, participatory action research provides a continual feedback loop; this process of *formative* (rather than *summative*) evaluation means that participants don't have to wait until the conclusion of the project to catch their mistakes, but can provide corrections mid-course. Finally, the knowledge generated through participatory action research is more useful to practitioners than the knowledge obtained by more conventional research. Since participants contribute to the creation of the research questions, the findings are less academic and more relevant to their practical concerns.

Three additional assumptions undergird this project:

*Education in the congregational setting calls for changes that are broad and systemic.* Congregations have tended to view education as synonymous with schooling; and past efforts to improve the congregational school have tended to be additive and incremental, taking the existent structures as given, and instituting new curricula, teacher training, or (most recently) family education. The ECE is based on the assumption that these limited changes



have led, at best, to limited outcomes. The challenges facing Reform Jewry call for changes that are more dramatic and far-reaching -- in a word, *transformational*.

*Transformational change can only occur when an institution's key stakeholders are prepared to explore and challenge one another's core values and assumptions.* This process is arduous and risky, bringing to the surface conflicts and contradictions that may have heretofore been glossed over. Its rewards, however, are many: for individual participants, new insight and deeper understandings; for the institution as a whole, a heightened sense of community and a renewed sense of purpose.

*The discussion of the core values and assumptions of congregational education must be set in a Jewish context.* Jewish texts, Jewish concepts and Jewish activities must serve as points of reference throughout. The process of exploration itself must be a form of *talmud torah*; participants must never lose sight of the fact that they are engaged in a holy task.

#### **What are the ECE's goals for its first three years?**

While each participating congregation will set its own specific goals, we expect that participating congregations will accomplish the following:

- Evolve a collective vision of the congregation as a *kehilla kedosha*, a holy community, and of the place of Jewish learning within that community.
- Arrive at consensus on what it means to be an educated, committed and practicing Reform Jew within that *kehilla*. The articulation of this vision must derive from a serious discussion of the place of classical Jewish texts, ritual practice, the Hebrew language, social action, and the land of Israel in the life of a committed Reform Jew. While every congregation in the ECE will probably arrive at a different statement of its vision, the traditional touchstones to be considered will be the same for all.
- Agree on a long-term plan for re-structuring the congregation's educational programs, in order to help all its members become educated Jews.
- Implement a number of more immediate changes that will move the congregation towards its long-term goals
- Develop a communication mechanism whereby members of the congregation can be informed of and participate in the shaping of the vision and the long-range plan.
- Share their understanding of the process unfolding in the congregation with a staff member of the ECE. This will enable the ECE to create a written record of both the issues that have been explored, and the processes through which this exploration has taken place.



**What will congregations participating in the ECE do? What activities will the project entail?**

While the specific issues facing the participating congregations will vary according to their particular circumstances and needs, a common pattern will guide their activities:

### **Convening a Task Force**

Each congregation will convene an educational task force, whose purpose is three-fold:

- a) to serve as the catalyst and focal point for a myriad of conversations aimed at articulating a vision of Jewish life and Jewish education;  
Some of the issues particularly salient for members of the task force might be:
  - What are the essential elements of being a literate Jew? Are knowledge of Hebrew and a facility with traditional texts criteria for Jewish literacy?
  - What should the relationship of the Bar/Bat Mitzvah ceremony be to the achievement of Jewish literacy?
  - What constitutes a Jewish role model? To what extent are those who serve in a teaching capacity role models for their students?To initiate and sustain these conversations the task force might employ parlor meetings, speakers, sermons, articles in the bulletin, and so on.
- b) to inquire into every aspect of the current educational program; to assess its strengths and limitations as measured against the task force's ideal vision; to investigate alternative institutional arrangements and educational modalities; and to derive from this inquiry a plan for restructuring. The full plan may take a year or more to formulate, and several additional years to implement (although parts of the plan will be amenable to implementation much sooner, as discussed below). At every step the task force should involve as many members as possible in its deliberations, and utilize a variety of mechanisms to keep members informed of its decisions.
- c) to institute a series of smaller, more immediate innovations that will be steps towards the ultimate goal; to use these changes as testing grounds for their ideas. For example, the congregation might:
  - broaden its conception of "teacher," and recruit a larger number of individuals to serve the congregation in some educative capacity;
  - create new mechanisms for trans-generational education;
  - give educational themes more visibility in its public events.

The task force should meet 6 - 8 times over the course of a year, attempting (wherever possible) to meet for extended periods of time in surroundings which are conducive to dialogue and reflection.



### **Task Force Membership**

The task force should represent a broad range of stakeholders in the congregation, including: the rabbi(s), the educator(s), and other senior professionals, teachers and other staff members, lay leaders (e.g., the chairs of the Board and the education committee), and congregants ranging in age as well as level of involvement in synagogue life.

A respected lay leader who can champion the cause of congregation-wide education should serve as Chair of the task force. One or more congregational leaders with a breadth of educational vision should also be recruited.

Serving in the capacity of "staff" should be a Coordinator, who will oversee the work of various subcommittees, gather the requisite information and resource materials, maintain constant communication with members of both the task force and the congregation at large, and perform other functions aimed at facilitating the task force's work. We project that the Coordinator may require as much as a day a week to fulfill these responsibilities. Each congregation will have to decide whether the Coordinator ought to be a professional (e.g., the educator), who would be relieved of some of his or her other responsibilities, or a lay person with experience in group facilitation, familiarity with Jewish educational settings, and a Judaic background.

### **The ECE Advisor and Consultants**

Each congregation will have an ECE Advisor, whose responsibilities will be two-fold: a) to assist the task force in its work, and b) to conduct research on the process of re-conceptualization and change. The Advisor, who will be hired and paid by the ECE, will visit the congregation several times a year (at the ECE's expense), and be available by telephone between visits. S/he will work closely with the task force Chair and Coordinator, serving as a broker between the congregation and ECE consultants with special expertise in Jewish education, planning, group process, and educational change.

Depending upon its composition and its needs, the task force may also require external assistance in planning, facilitation, data collection, and/or critical reflection. As needed, these skills will be provided by the ECE staff and its consultants at no cost to the congregation.

### **Participation in the ECE's Research Effort**

As indicated above, the ECE Advisor will be responsible for studying both the process and the outcomes of the work of the educational task force.

Depending on the abilities and interests of task force members, this research may be more limited or more expansive in scope. At the minimum, it will



include participation in critical reflection activities at regular intervals. The advisor will document and write up these activities; s/he may also observe other congregational activities, and interview key informants.

In addition, the task force may designate one or more of its members to perform some of the following functions:

- collect baseline data on current educational programs;
- study the various subcommunities within the synagogue, their needs, interests and patterns of interaction with other subcommunities;
- keep an anecdotal record of the work of the task force;
- collect data on the tangible outcomes of restructuring.

The ECE Advisor will assist in the planning and coordination of these activities.

### **Networking with Other Congregations**

Participating congregations will have other opportunities to share resources and work collaboratively on specific issues, such as the recruitment and training of educational staff, curriculum development, and family education. The ECE will have on its staff a "network manager," responsible for creating and sustaining networks among congregations. This person will also help the congregations find needed educational resources.

Three times during the course of the project, leadership teams from each of the participating congregations will come together for two or three days, for discussions of common concerns, and workshops on such topics as planning, and educational change.

### **What kinds of congregations is the ECE looking for?**

From the perspective of the ECE, the primary criterion for a congregation's participation in this project is its commitment to deliberate for an extended period of time on a number of key issues: its ideal for itself as a *kehilla* (community); the role of education within the *kehilla*; and the fit between its current educational programs and this ideal.

Congregations who join the ECE must share the view that education is the purview of the entire synagogue, rather than just the school. Top lay and professional leaders must become actively involved in the task force process, and be able to sustain their commitment for a number of years. In addition, a wide range of members should be represented in the task force.

A third characteristic of participating congregations must be their willingness to take a number of risks: to re-think and revise some of their assumptions; to



explore alternative institutional arrangements; and to allow their deliberations to be written up and shared publicly as part of the research.

### **What will the congregation receive from the ECE?**

- assistance in structuring its deliberations regarding Jewish life and Jewish education;
- assistance in strategic planning;
- support from the ECE Advisor and a limited number of free consultations from the ECE consultants;
- specific expertise in areas of Jewish education, such as curriculum and staff development;
- guidance through a process of critical reflection;
- opportunities to network with other congregations undertaking similar efforts;
- assistance in raising funds from local and national foundations, to cover the cost of hiring the Coordinator, sending teams to ECE workshops, and other task force expenses.

### **What commitments must a congregation make to the ECE?**

- to convene a high profile task force in which the various constituents of the congregation are represented.
- to designate a task force Coordinator, who will be able to devote approximately one day a week to the project. This person might be an educational professional (relieved of other responsibilities to accommodate this task) or a lay leader with expertise in education, organizational development or planning.
- to cooperate with the ECE Advisor's efforts to document the planning process through questionnaires, observations and interviews; to allow results of this research (subject to review by the congregation) to be disseminated.
- to assume the travel costs for a team of at least three task force members to travel to three ECE workshops over a three year period. The ECE has a limited fund for defraying a portion of these costs, and will assist the congregation in raising funds from outside agencies.

### **How should a congregation decide whether or not to join the ECE?**

The decision to join the ECE should be made through a series of explorations and conversations with an ever-widening circle of participants, according to the following schedule:



### Initial Conversations

- At least four key leaders should be involved in the initial conversation: the senior rabbi, the educator, the congregation president, and a lay leader with educational responsibilities. This group might begin by reading this document very carefully, noting areas of agreement and disagreement, questions and concerns.
- After this group has had a chance to discuss the document, a conference call should be arranged with Dr. Isa Aron, Director of the ECE. During this conversation, questions will be answered and specific issues discussed.

### Expression of Interest

If the group finds itself in agreement with the major premises of this document, and feels that it can meet the expectations delineated above, it should designate one or more of its members to summarize the main points of their conversations in a written "expression of interest," comprised of the following:

- 1) a cover letter, indicating the congregation's interest in joining the ECE, and its ability to:
  - convene a high level task force;
  - engage a Coordinator for a period of two and a half years;
  - allocate funds for travel over a period of two and a half years.This letter should be signed by the congregation's president and senior rabbi.
- 2) a short essay (1-2 pages) addressing the following questions:
  - Why is the congregation interested in joining the ECE?
  - What are the leadership's current thoughts about the nature of the synagogue community, and the role of Jewish education within that community?
  - How would participation in the ECE fit with the congregation's other spheres of activity and special foci?
  - With what "big issues" is the congregation grappling at the present moment? How might these issues impact on the work of the task force? How might the task force impact on these "big issues?"
- 3) a single page "data sheet" on the congregation, including:
  - the demographic breakdown of its membership;
  - a list of the educational programs, and the number of participants in each;
  - size and description of the educational staff;

If the congregation has engaged in a process of long range planning at some point in the past five years, it would be helpful if summary documents pertaining to this planning process could be included.



This written expression of interest should be sent to Isa Aron, at the RHSOE, by February 15, 1994.

#### Widening the Conversation

- In subsequent weeks, the initial group should cast its net more widely, involving other members of the congregation's leadership, in conversations similar to the one it has begun.
- Concurrently, the congregation should begin to think about potential members of the task force, especially the Chair and the Coordinator.

#### Site Visit

In February or March, 1994, either Isa Aron, the ECE Director, or Sara Lee, the Director of the RHSOE, will visit the congregation for approximately two days. This visit will serve as an opportunity for the congregation to learn more about the ECE, and for the ECE to learn more about the congregation. Arrangements should be made for the ECE representative to meet with diverse groups, such as the Board, the professional staff, and appropriate committees. These meetings will afford an opportunity to discuss some of the larger issues which will be raised in the course of the process, and to consider which congregants should be invited to join the task force. If possible, meetings should be arranged with some of these individuals.

#### **When and how will the formal decision regarding the congregation's participation in the ECE be made?**

The decision regarding participation in the ECE will be a joint decision between the congregation and the ECE, to be made in the Spring of 1994, after the site visit has taken place. If the congregation finds itself in agreement with the goals of the ECE, and able to meet the conditions outlined on pp, 6 - 7 of this document, a letter of agreement, outlining the mutual obligations of the ECE and the congregation, will be drafted. We recommend that participation in the ECE and the establishment of the task force be voted upon by the synagogue Board, and that the Board require the task force to report on its activities at regular intervals.

We hope to have all ECE participants on board by May, 1994.



## **When will the project officially begin?**

By the time the agreement is reached, the initial phases of the experiment will have been well underway. At this point the Advisor will visit the congregation for the first time, to discuss:

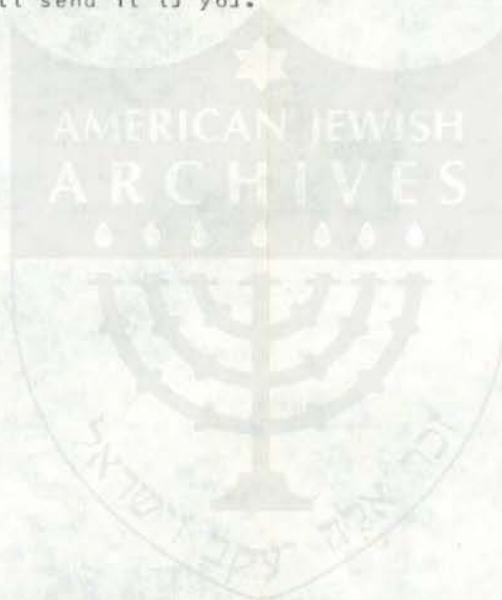
- the composition of the task force;
- plans for the first few meetings of the task force.
- plans for the official "launching" of the project, through sermons, panel discussions, focus groups, articles in the Temple bulletin, etc.

### **Tentative Timeline**

January, 1994	<ul style="list-style-type: none"><li>• congregation receives this document; small leadership group meets to discuss reactions</li><li>• conference call with Isa Aron to ask questions and discuss concerns</li><li>• congregation begins work on letter of application</li></ul>
February 15, 1994	<ul style="list-style-type: none"><li>• letter of application due</li></ul>
February/March, 1994	<ul style="list-style-type: none"><li>• site visits by Isa Aron or Sara Lee</li></ul>
April/May/June, 1994	<ul style="list-style-type: none"><li>• letter of agreement between congregation and ECE</li><li>• Advisor visits congregation</li><li>• task force invitations issued</li><li>• plans made for initial meetings of task force</li><li>• official "launching" of project</li></ul>
October/November, 1994	<ul style="list-style-type: none"><li>• first workshop for leadership teams from all congregations (location to be announced)</li></ul>
May, 1995	<ul style="list-style-type: none"><li>• second workshop for leadership teams from all congregations</li></ul>
March, 1996	<ul style="list-style-type: none"><li>• third workshop for leadership teams from all congregations</li></ul>

From: EUNICE::"iaron@eis.calstate.edu" 14-JAN-1994 11:22:43.12  
To: 73321.1220@CompuServe.COM  
CC: gamoran, baholtz@theo.jtsa.edu  
Subj: After all that ....

>  
> Hi folks!  
> I now have proof that there is such a thing as overplanning. Two days  
> ago I got a call from Amy Niestein, the educator at the congregation in  
> Milwaukee that we had asked to join the ECE. To quote her: "This is the  
> right project; we are the right congregation; but this is the wrong  
> time." They are actively fundraising for an endowment, and worried that  
> they can't support two big efforts at the same time.  
> I was sorry to see them withdraw, but better now than later. What I am  
> really upset about is losing Roberta's input, which is invaluable. Is there  
> any way we can continue to have her as a consultant? Let me know what  
> you think.  
> I have just finished a long memo proposing a research design for our  
> project. If you think it still relevant, I'll send it to you.  
> B'Shalom, Isa  
>





From: EUNICE:"iaron@eis.calstate.edu" 4-APR-1994 02:31:42.34  
To: ALANHOF@vms.huji.ac.il  
CC: gamoran  
Subj: Re: another chapter in the never ending story

Hi folks! Just when you thought it was safe to go back to plan the CIJE research program as though the ECE didn't exist ...  
There is now a long shot that we will work in a congregation in Chicago in addition to the other five. It depends on our getting additional money from the Cummings Foundation, not an impossibility (because they are looking to fund things in the Chicago area, but still a long shot).. I'm assuming that we could still prevail upon you to release Roberta. This wouldn't start until September, '95, though I should have some sense about its feasibility by May or June.  
Thanks for your flexibility and generosity. I'll be in touch when I have more information.  
Alan -- can you tell me how I might go about getting an e-mailhookup for the 5 weeks I am in Israel? Would I need to pay? Have a university connection? Would either HUC or the Melton Center work?  
L'hitraot, Isa





From: EUNICE::"iaron@eis.calstate.edu" 17-MAR-1994 10:47:57.14  
To: ALANHOF@vms.huji.ac.il  
CC: gamoran  
Subj: What a mess!

Hi Alan and Adam!

Well, I'd thought that this negotiation with Atlanta had taken every possible turn, but I continue to be surprised. Now the congregation may still be a part of the ECE, but Roberta won't be able to be the Adviser.

Turns out that Roberta still has some good friends in the congregation, with whom she maintains regular contact. Alvin (the rabbi) and Joanne are uncomfortable about this, and though I'm not sure exactly what they're worried about, Sara and I agreed that, under the circumstances, Roberta couldn't serve as their adviser.

However, Alvin is now hell-bent on participating in the ECE, and he came up with the name of the one possible person who might indeed be able to serve as an adviser -- Sam Joseph, the education professor at HUC in Cincinnati, who is currently in Hong Kong for the year.

So now I will be tracking down Sam, and seeing if this is feasible. Following the principle we've established that we can't disinvite a congregation once we've invited it, we have to follow this possibility through to its conclusion. This should take a week (or more, if Pesah gets in the way).

Where does this leave us with the CIJE? I'm not sure. If we have a congregation in Atlanta, but without Roberta, this may be the best possible outcome for the CIJE.

But I want to raise one additional possibility: Should Sam Joseph be unable to take this on, eliminating Atlanta as a possibility, would you consider allowing Roberta to work with our project in another city, as yet unnamed? I'm keeping in mind, Alan, your comment that you want to begin moving beyond the three initial lead communities. If you would consider allowing Roberta to work with us, do you have any suggestions as to location?

You don't need to answer me just yet, but I wanted to give you an update, and put all my cards out on the table. I'll get back to you as soon as we've reached some decision regarding Atlanta.

After all this, cleaning for Pesah will be a relief! Hope you and your families are well. Hag sameach!

Isa



*Memorandum*

**HEBREW UNION COLLEGE-JEWISH INSTITUTE OF RELIGION**

3077 UNIVERSITY AVENUE • LOS ANGELES, CALIFORNIA 90007-3796 • PHONE 749-3424

TO Adam Gamoran

DATE Jan. 26, 1994

FROM Isa Aron

Here's the research memo I mentioned in my E-mail message. I would welcome your comments and critiques.

I'll check in with you to look this over. Thanks.





## DRAFT

Memo to: ECE Advisers and Consultants

From: Isa Aron

Re : Research

In this memo I will:

- 1) make a case for research as an integral part of the Experiment in Congregational Education;
- 2) explain what action research is, and why we believe it is particularly appropriate for this project;
- 3) propose a research design, presenting some of the major research questions within a conceptual framework;
- 4) spell out what I see as the implications of this research design for the ECE Advisers.

*I view this memo as a very preliminary draft, which will go through many revisions in response to your reactions and those of the congregations. I welcome your comments and critiques!!!!*

### Why Does this Project Require a Research Component?

Research is important component of the ECE for a number of different reasons:

- From the perspective of the congregations, reflection and self-assessment are essential the task force process. It is not hard to imagine the work of the task force becoming derailed or sabotaged, even by those with the best of intentions. Opportunities for frank and open discussion might, inadvertently, be cut off; some participants might, knowingly or unknowingly, monopolize the discussion, or use the task force as a springboard for promoting their own agendas. Building in formative evaluation from the outset and eliciting the participants' feedback at regular intervals will allow the facilitators of the task-force to change course and modify their procedures as needed.
- Research can be useful to the task force process in a second way, encouraging participants to focus on questions, rather than on decisions that might be premature . Whenever possible, we want to stop people from invoking old, and possibly unwarranted, assumptions without examining them further. Building research into the process can get participants to take a fresh look at an overly familiar situation.



- Beyond its usefulness to the congregations, research is important to the ECE because it will enrich our understanding about change in the congregational setting. Our project is, to the best of our knowledge, unique. Only a few congregations have attempted this kind of broad, systemic change; none of these have written up what they have learned from the process in a form in which it could be shared with others. As a project under the auspices of the Rhea Hirsch School of Education, we have a clear obligation to document and analyze the process to the best of our ability.

We need to acknowledge at the outset that the ECE staff and the congregations differ somewhat in their reasons for wanting research, and in the type of research they require. The congregation needs information that is quick and specific, for the purpose of feedback and evaluation. The ECE's goal, on the other hand, is to compare what happens at different sites. In addition to assisting the five congregations currently participating in the project, we hope, ultimately, to arrive at a set of guidelines which will be useful to the next generation of congregations engaged in reconfiguration.

The interests of the congregations and the ECE are hardly incompatible or irreconcilable; but the differences should be taken into account in our research design, which will be discussed below.

### What is Action Research, and What Makes it Appropriate for this Context?

"Action research" is a term used for research which attempts, by its very design, to *both* solve problems *and* increase our understanding of the world. Unlike most social science research, which distinguishes researchers from their subjects, action research is a product of the researcher and the participants working together. Action research assumes that everyone involved in a situation has a unique perspective, and that the inclusion of these diverse perspectives results in research that is richer and more usable.

A second difference between action research and conventional research is that it is conceived of as iterative or recursive, rather than linear. It is assumed that every action research project will go through several cycles of planning, action and reflection. These iterations "allow practitioners to use their own reflections, understandings, and developing theories to inform both practice and research"(Oja and Smulyan, 1989, p.20).

We see action research as particularly appropriate for the ECE because in the ECE the roles of researcher and participant are already overlapping. The role of the ECE Adviser involves, by definition, both research and action. Moreover, it is very likely that among the task force members will be



individuals with excellent research skills, who will be invited to contribute to the research effort.

This blurring of responsibilities is a necessary expedient: We can't afford to hire both a researcher and an adviser for each congregation; even if we could, mounting this effort without attempting to draw on the expertise of congregants at each site would be to neglect potentially valuable human resources. But our interest in action research goes beyond mere expedience. Ultimately, the ECE is about the empowerment of congregants to take responsibility for their own Jewish education, as well as their children's. This process of empowerment must be built in at every step. It is inconceivable that members of the task force will not bring a great deal of wisdom and experience to the process. Why not enlist them in helping us codify and hand down this wisdom? While we originally thought we could make this a pre-condition for the congregation's participation, we now see it as a goal to work towards; rather than requiring the congregation to participate in research, we will attempt to persuade them of its value..

### A Proposed Research Design

The research design outlined in this paper attempts, therefore, to meet a number of desiderata: to make research an integral part of the "action;" to allow each partner in the collaboration to contribute according to his or her interests and needs; to accommodate modifications through successive cycles; and to fit the constraints of both time and budget.

At the simplest level, the purpose of research in the project is to tell the story of the ECE as it unfolds. This "story" can be elicited through two types of questions: questions about the process and questions about outcomes. Some process questions include the following:

- How will the task force at each congregation be constituted?
- How will the structure for the deliberations be arrived at?
- Will the guidelines provided by the ECE prove useful?
- What unexpected "wrinkles" will emerge?

Equally important are questions regarding outcomes:

- What new structures, programs, or staffing arrangements are put in place as a result of task force deliberations?
- Do these changes succeed in helping the congregation achieve its goals?
- What are the congregation's goals, and do they change over time?

If the "story" at each site were to be told by a single participant observer, he or she might require no advance guidance. Immersed in experiences and in field notes, the participant observer would find salient themes emerging, which would gradually sharpen the focus of his or her inquiry.



Unfortunately, we cannot afford to have a participant observer at each site. Moreover, we want our inquiries at the different sites to "speak to one another" in some way. We have no choice but to focus our inquiry from the outset. But what principle of selection shall we use? Without knowing what will turn out to be important, how will we know where to point the lens?

One way of narrowing the possibilities is to evaluate questions in terms of their utility: what will we be able to *do*, when these questions are answered? Cronbach and Suppes (1969) make a distinction which I find helpful-- between conclusion-oriented research and decision-oriented research. The former allows us to know something, the latter to do something with our knowledge. In the context of the ECE, I would sub-divide the category of decision-oriented research further, distinguishing between information which will be of direct and immediate use to each congregation and information which will be most useful in working with the next generation of congregations. Some of our research should be designed to assist each task force in assessing its progress, enabling it to make adjustments and corrections mid-course. Next, a comparison between sites should allow the ECE to make some general statements (more in the nature of hypotheses to be tested than axioms already proven) about the pre-conditions for successful change. Finally, research conducted as part of the ECE has the potential for addressing a number of larger issues that go beyond this specific project, issues relating to transformational change in institutions, and to the aims of Jewish education. Any contribution we would make to a discussion of these issues would fall into the category of conclusion-oriented research.

Thus, the potential research questions can be arrayed along two different dimensions: process vs. outcome, on the one hand, and decision vs. conclusion orientation on the other. The following table lays out the possibilities:



	decision orientation		conclusion orientation
	Immediate Feedback to Congregation	Larger Implications for Future Participants	Larger, underlying Issues
Questions Regarding Process	A <ul style="list-style-type: none"><li>• is the task force representative?</li><li>• is there consensus on goals?</li><li>• are the work plans followed?</li><li>• pockets of resistance and their effects</li></ul>	B <ul style="list-style-type: none"><li>• roles played by members of task force</li><li>• dealing with resistance</li><li>• prerequisites in terms of support</li></ul>	C <ul style="list-style-type: none"><li>• how linear a planning process is possible in an organized anarchy?</li><li>• do participants perceive their task as incremental or transformational?</li></ul>
Questions Regarding Outcomes			
1) degree of involvement in planning	D <ul style="list-style-type: none"><li>• task force meetings well attended?</li><li>• people feel productive?</li><li>• members of congregation aware of changes?</li></ul>	E <ul style="list-style-type: none"><li>• what are the differences between the processes that worked and those that didn't?</li></ul>	F <ul style="list-style-type: none"><li>• Is an increase in interest among congregants a "true" outcome, or only a stepping stone?</li></ul>
2) increase in learning activity	G <ul style="list-style-type: none"><li>• baseline data on extent of learning</li><li>• compare several years into plan--are more people learning?</li><li>• what are areas of greatest interest, and why?</li></ul>	H <ul style="list-style-type: none"><li>• what accounts for differences between congregations?</li><li>• how can the ECE help in certain areas?</li></ul>	I <ul style="list-style-type: none"><li>• is an increase in activity a "true" outcome?</li><li>• do we place a higher value on certain subjects?</li><li>• are certain subjects more or less appropriate for certain modalities?</li></ul>
3) increase in Judaic knowledge and practice	J <ul style="list-style-type: none"><li>• does increased activity lead to increased knowledge and increased practice?</li></ul>	K <ul style="list-style-type: none"><li>• what accounts for differences between congregations?</li></ul>	L <ul style="list-style-type: none"><li>• do we value certain practices more than others?</li></ul>



The following is a preliminary list of questions that would fall into each cell:

*Cell A: questions about the process with short-term implications for the congregation:*

- 1) Does the task force adequately represent the diversity of congregational membership, in terms of age, family situation, and level of involvement in both congregational life and Jewish study?
- 2) Is there consensus among members of the task force as to its goals?
- 3) Which members of the congregation (or of the professional staff) are resistant to the process, or to the need for change? What are the results of this resistance?
- 4) How has the task force structured its meeting time? What topics has it taken up? To what extent have any of the "work plans" offered by the ECE been followed?

*Cell B: questions about the process with long term implications for the ECE*

- 1) At the outset, each congregation was given a list of roles the ECE thought necessary for members of the task force to play. Who ends up playing each of these roles in each setting? Have any of these roles been neglected? What additional roles have emerged? Are there any generalizations that can be made regarding the roles played by task force members? Are certain roles critical? Are certain roles more appropriate for the professional leadership, the lay leadership, outside consultants?
- 2) Are there any general statements that can be made regarding resistance to the process, and how it has been handled at each site?
- 3) In what ways have members of the task force and of the congregation indicated their support for this process? What are the results of this show of support?

*Cell C: larger issues which emerge from the process*

- 1) Most congregations are not organized in a rational, hierarchical manner, falling into the class of organized anarchies, or loosely coupled systems (Shevitz, 1993); yet the planning process the ECE suggests to the congregation is rather linear. How might we compare the organizational patterns in the different congregations? How did what happened diverge from the linear planning process?<sup>1</sup>
- 2) How do members of the task force think about what they are doing? Do they see themselves as involved in a process of incremental change or transformational change?

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<sup>1</sup>This question was suggested by Susan Shevitz.



*Cell D: questions about the degree of involvement in the planning process with short-term implications for the congregation:*

- 1) Are task force meetings well attended? Which people attend regularly and which don't?
- 2) What is the "spirit" of task force meetings? Do members feel as though they are working as a team? Do they feel productive?
- 3) Is the work of the task force visible to the congregation? Has the task force managed to convince people of the importance of its work? How well has it communicated its findings and decisions?

*Cell E: questions about the degree of involvement in the planning process, with long term implications for the ECE:*

- 1) Can we make any generalizations about what made some congregations more successful than others in involving both its members and the congregation at large?

*Cell F: larger issues regarding the degree of involvement in the planning process:*

- 1) What counts as a "true" outcome? Is raising the profile of education in the congregation a significant outcome in its own right?

*Cell G: questions about an increase of learning activity, with short-term implications for the congregation:*

- 1) The ECE's most important goal is to increase the level of "learning activity" in the entire congregation. In order to assess this outcome several years hence, some baseline data will have to be collected, about the extent to which learning is taking place in formal classes and havurot, at services and meetings, and independently in the home.
- 2) Are more people studying something Jewish? Are certain learning modalities and/or subject matters more popular, and why?

*Cell H: questions about an increase of learning activity, with long-term implications for the ECE:*

- 1) What accounts for different rates of increased learning activities at different congregations?
- 2) Is there anything the ECE can do to help make the study of certain subject matters more appealing or accessible?

*Cell I: larger issues regarding learning activity:*

- 1) Is increased learning activity a "true" outcome? Is this the same as *Torah lishma*? Why are people learning more? How do they explain what they are doing?
- 2) Do we place a higher value on some subjects than on others?
- 3) Do certain subjects seem more suitable for certain learning modalities, and vice versa?



Although the Jewish tradition values *Torah lishma*, it also expresses the clear expectation that study leads to increased knowledge, and (perhaps more importantly) to increased Jewish practice. The extent to which this is the case forms the base of the last set of research questions, which is likely to take different forms and have different dimensions in each of the contexts. At the congregational level (cell J) it may involve assessing possible increases in participation in services or social action projects, observance of certain rituals, involvement in Israel or world Jewry, etc. For the ECE (cell K), it will require us to compare, and attempt to explain, differences between congregations. Finally (cell L), this question will bring us face-to-face with the issue of whether we value certain knowledge and certain practices above others. If so, should the ECE suggest or encourage particular areas of study?

### How this Design Focuses and Simplifies Our Task

The above list is, of course, quite preliminary. It will be emended continuously, as cycles of planning, action and reflection accumulate. Even at this early stage, however, this research design points to a division of labor between the congregation and the ECE; it also serves to clarify roles played by the ECE Adviser at each stage.

The continuum between questions of process and those of outcome corresponds to the project time-line. During Year I research should, I propose, focus entirely on the process, and on involvement in the process as an outcome. During Year II process concerns should remain on the agenda, but yield, gradually, to the collection of baseline data regarding learning activity, knowledge and practice. During Year III the collection of this baseline data, and the establishment of procedures for further data collection on outcomes should be the major research tasks.

The differentiation between decision-oriented and conclusion-oriented research, and the further sub-division of decision-oriented research, allows us to differentiate between research tasks appropriate to the congregation and those appropriate to the ECE. Questions in the left hand column (cells A, D, G, and J) are extremely relevant to the work of the task force; indeed, the feedback received from answering the questions in cell A and D are necessary to its success. Moreover, it will be relatively easy to gather the data to answer these questions -- one can imagine questionnaires and follow-up discussions built into the deliberations as periodic process checks. These questions exemplify action research in its purest form. Moving down the column. it will require considerably more effort to formulate questions regarding outcomes; here the interests of the congregation and the ECE may diverge. While questions regarding outcomes are of great importance to the congregation, those engaged in the task force process may not feel the need to collect systematic data to answer them. They may feel that they can learn



enough from anecdotes, or from sensing the atmosphere in a gathering, much as a teacher often intuitively knows whether his or her students have learned something. The willingness of the congregation to participate in this type of research may depend on the interests and talents of individual congregants, and will probably vary from congregation to congregation. Since developing the instruments to study outcomes is a task common to all the congregations, the ECE will have to play a more prominent role in pulling together various strands of activity. As to research questions in the second and third columns, these are clearly the responsibility of the ECE; it is our hope, however, that in several of the congregations one or more individuals will become interested enough in some of these questions to participate in this task.

All of the above serves to clarify the research tasks which devolve to the ECE Adviser. For the duration of the life of the task force, the Adviser's primary research responsibility is to guide the task force through an assessment of the process at various checkpoints, and to record these and other reflections on the process itself. Periodically, Advisers will meet to share information from their respective sites. Together, they will work to compare and contrast the task forces, testing out potential generalizations and guidelines for future congregations. With these first two layers completed, the discussion of larger implications can be left to whatever member of the ECE staff is willing (and able) to take them up. In Year II, and, increasingly, Year III, the collective task of the Advisers is to create the instrumentation through which baseline data on learning activity, knowledge and content can be collected. To accomplish this daunting task, the ECE may need to hire an outside consultant, leaving the Advisers to function more as brainstormers, at the outset, and a sounding board, later on. Once the instrumentation is available, it will be the responsibility of the adviser to work with the congregation to collect the data.

### A Coda

Grant proposals and other descriptions of the ECE often invoke the term "transformational change." We hope that the task force will transform the congregation from an institution which houses a school into a community in which learning is essential. The research paradigm proposed is also, we hope, transformative. We hope that a group of researchers accustomed to working in isolation from their "subjects" and a group of congregational leaders for whom research is largely irrelevant will learn to inquire together. We hope, further, that the fruits of their inquiry will include an enhanced learning community, a more enlightened set of guidelines for other congregations, and an enriched discourse for the field of Jewish education.



## REFERENCES

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- Shevitz, Susan. "An Organizational Perspective on Changing Congregational Education: What the Literature Reveals." Paper Prepared for the Rhea Hirsch School of Education Consultation on Reconfiguring Congregational Education, Malibu, May, 1993.

