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

Series D: Adam Gamoran Papers. 1991–2008.

Subseries 5: General CIJE Files, 1991–2008.

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Box  
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JEWEL: North American Center for Jewish Educational Leadership. Correspondence, notes, and workplans. "Guiding Principles", 1998.

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## **Staff Retreat discussion**

**May 26, 1998**

MLM would like to come in later in the summer to talk to staff about his vision how to design a foundation that will be an important force for change in the Jewish community through targeted philanthropy. KAB discussed CIJE's role in this.

MLM intends to have long-term strategic plan for Mandel foundations by November. It was be hard to get long-term commitments in the next 6 months, though long-term commitments may eventually be greater.

KAB discussed Mandel sectors:

- Jewish education sector (headed by Seymour) – including leadership training in Jewish world
- Urban renewal – so far only in Cleveland
- Leadership/management – outside Jewish world

Urban renewal and leadership/management sectors still in conceptual stage.

Seymour/Annette – US leadership training programs need to be different and autonomous from those in Israel.

Annette and KAB to design new foundation to be based in either Cleveland, New York or Jerusalem. Planning committee for the new foundation is as follows:

Seymour Fox

Annette Hochstein

Steve Hoffman

Stanley Horowitz

MLM

LP (if he has time)

Chuck Ratner

Role sector heads not yet clear. Ideally, the strategy should be developed first, followed by a structure, then positions should be filled, but this process will be more creative.

The fiscal year is changing to July to July. KAB is going with LP in August to the Mandel board. Originally, our idea was to develop an 18-month workplan, but now is not a good time to do this for 3 reasons:

- Mandel foundations' long-term strategic plan will not be ready before November (see above).
- We do not have an accounting person to do the 18-month budget.
- We don't yet know what we will be doing 18 months from now. We are still feeling our way with some projects, e.g. JEWEL institution, field sites.

So our immediate goal is to develop a 6-month workplan for January 1 to June 30, 1999.

MLM is very involved in thinking about the structure of the foundation at this point, and cannot devote time to thinking about other things right now, e.g. the JEWEL strawman, but he is very committed to the idea of JEWEL, and when he has time, he will be want to be involved and will

be very interested in the details. Seymour is very interested in JEWEL and KAB will discuss it with him further in Israel in July.

LP has stressed two things:

- It is important to keep moving forward even during this transition period.
- There is real need for local autonomy within the organization.

The faster we can move ahead the JEWEL planning process, the better off we will be, but we need to bring in more people to do this. Steve Hoffman's perspective on JEWEL is that what we are trying to do is build a small university.

List of projects for 1998 and 1999 was reviewed:

1998	1999
<u>JEWEL</u>	
Planning (including Lay Leadership Research) ⇒	Pilot – Prof (new project) Pilot – Lay (new project) (Baltimore Project?) Planning (including Lay Leadership Research)
TEI ⇒	TEI
Professors ⇒	Professors
Forum ⇒	Forum 2000
Rabbinic Ed Conference ⇒	Rabbinic Ed Conference
High School Leaders ⇒	High School Leaders
<u>CFWW</u>	
Planning ⇒	Conference Launch
Torah Umesorah	
Shearim ⇒	Shearim JCCA Other Pilots
JTS	
<u>R&amp;D</u>	
Indicators ⇒	Indicators/Evaluation Institute
Economics of Jewish Education ⇒	Economics of Jewish Education
Early Childhood ⇒	Field Site
Change ⇒	Field Site
- Synagogue Change	
- Think Tank	
Lay Leadership Research ⇒	Lay Leadership Research

## ADMIN

External Communication ⇒  
Internal Communication ⇒  
Fundraising ⇒  
Board & Chairman's Council ⇒

External Communication (Forum)  
Internal Communication  
Fundraising/grantwriting  
Board & Chairman's Council

## Publications

Teachers Report  
Leaders Report  
Brochure  
Strategic Plan

Policy Brief on Professional Development  
Beit Rabban (DNP)  
Rabbinic Education (following the conference)

On fundraising, MLM does not want us to solicit single donors (e.g., our board), only foundations/partnerships (e.g., Cummings, Jim Joseph), and he will provide additional funds to make up the difference in the budget. Accordingly, the hiring of a fundraiser is on hold.

All think tank work is now under R&D, and "core" is being dropped from our vocabulary.



Admin equals CIJE institution building.  
JEWEL equals leadership development.

Where is Study Group on Jewish texts?

Some projects have insides that have crossover, e.g., TEI Internet and the website relates to external communication.

Questions asked on list of projects:

- How do we see list of projects as moving us towards our goals?
- Could we apply Susan Cane's wheels to our thinking about the workplan?

It was raised that people know about Carnegie because they publish the Carnegie Reports, and even they are not great publications, they set the agenda for discussions.

Issues raised/reactions to list of projects:

- Think tank on leadership
- Network of TEI grads  
Internet ↑
- Publications related to R&D
- Leveraging Academic Publications
- "Big Ideas" Publication

There was a concern about the disparateness of the audiences for the different projects.

Basic strategy:

- development of leadership
- development of big ideas
- research and development
- consulting – following audience home

Issues raised/reactions on chart C (attached).

When we actually do the work, we call it a pilot. In 1998, we are doing a lot of little things in order to move towards building national institutions.

It was raised that we have never conceptualized the workplan through a tipping point approach. e.g., TEI graduates → community impact → involvement of lay leaders.

CFWW launch with 5 consultants. Conference is a separate project.

What would it mean to take 10 TEI graduates or 5 rabbinic education conference participants and follow them home to do consultations? There was a discussion of what it would look like to integrate projects with each other and CFWW. How we do it is another issue, but structuring and administration would be easier if management is under one person.

Where do we put consulting resources: against institutional clients (e.g., JCCA) or things which support our own work?

Are we trying to build demonstration sites/best practices? Is integration itself of value and does it further our goals? To show that it is difficult to effect real change, but this is how it is done.

It is a question of scale, and on what scale do we look at things.

For example, there is the Eliot Pearson School at Tufts, which is both a demonstration site (where everything is perfect) and a research site (where there is the freedom to fail).

We are creating groups with a common vocabulary, and we can send them out with the idea that any kind of critical mass makes a difference. but are we losing this piece of people with a common idea of teaching and learning?

## Learning from failures

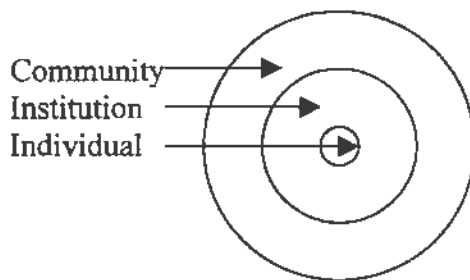
TEI 5 could be very different from previous cohorts because of integration at the next stage. What could we learn from integration/work at the next level? TEI follow-up might be more successful if it sits inside Synagogue Change project rather than going to the community and offering our services on Synagogue Change.

The story was related on how a community came to us and said that they have no money for an educator to attend TEI, but it is clear that they have money for other things, which indicates the priorities of the community.

When we were thinking about adding to the list of lead communities, there was a list of criteria:

- Enlighten Federation executive
- Involved lay chair
- Wexner community
- Institution of Jewish higher education
- etc.

Nested idea of education:



We have all 3 of these on the workplan but in different places.

Are there things to be learned from past experiments in the history of Jewish education (e.g., Melton/Columbus)? In general, the more good people, the better.

But concentration of talent and money has:

- failed at times,
- effected change in one place, and
- very few times has change been effected in a broad way.

We know that context matters and what we know today is different from what we know before and what we will know in the future.

What is missing most today:

- people
- big ideas
- lay/professional

Look at the idea from the business world of total quality control:

- 15 years ago it was an idea.
- Then 3 big companies with name recognition tried it and showed that spending on it actually saved money.
- Now it has completely seeped into companies.

What would 3 big demonstration sites in Jewish education look like?

For example, B'nai Jeshurun is known for innovations and being on the leading edge, but they admit that their education really needs help.

We know from TEI that people in institutions/organizations on the fringe are more willing and able to try new things and take risks.

Do you start someplace fabulous or do you start someplace that needs help?

The issue of integration has led us to the necessity of demonstration sites.

What are we trying to accomplish?

Institutional) Demonstration Sites ⇒ TEI Synagogue Change Early Childhood	What would it look like to apply our evolving school of thought to institutions?
Communal) Community Mobilization – Policy ⇒ Lay Leadership Res      Forum Publications Econ of J Ed Indicators Lay Leadership Pilot	How do we affect policy?
Individual) Building Capacity for the Future ⇒ JEWEL Pilot              Lay Leadership Pilot CFWW Pilot              Prof Pilot TEI                        Rabbinic Ed Conference High School Leaders	JEWEL Planning CFWW Planning/Launch Prof TEI Shearim

Maybe lay leadership pilot needs to be at the institutional level? We need to re-think as we re-categorize.

Demonstration sites don't come out of the workplan as listed. The workplan list doesn't show us where we are going; it is a list of activities. We should keep in mind that where the activities falls now is not necessarily where we want them to be further our goals.

Should we be working on all 3 levels at the same time? The levels aren't linked/"nested". Are we committed to linking?

We need to consider the time and staff needed to do a demonstration site vs. a consultation to a demonstration site.

Do we go directly to a demonstration site, or do we phase in through a JEWEL pilot or the training of CFWW consultants?

The lead community ripple effect didn't work – are we afraid of failure as a result of this?

Demonstration sites force us to define:

- success
- what need to be demonstrated
- our ideas/school of thought

We think we have a better idea/school of thought about Jewish education. We are not the only ones with this idea; there are individuals who embody this idea. This idea can be applied across the denominational spectrum, e.g.:

- Torah Umesorah (though they only use part of our school of thought)
- Shearim
- Community day high schools —————> Reform early childhood schools

How to apply school of thought to demonstration sites

Demonstration sites are a priority.

The school of thought is both "what" and "how", guiding principles which are trans-context, the larger principles by which we inform the enterprise.

What are the outcomes we aspire to? In what kind of institution? Inside different institutions the "what" and "how" are different.

It was suggested that we should start with synagogues because we have the most experience in this area with TEI and the Principals Seminar.

We need no fewer than 3 sites – in case of failure, and no more than 6 sites – not to overload ourselves.

In the planning process, we have to figure out how to get 3 to 6 synagogues to implement our school of thought.

What are critical things to demonstrate in order to inspire change?

Another suggestion was Jewish institutions of higher learning in order to leverage:

- Building capacity



- Prof
- Teaching/learning

These institutions are a known quantity, and the people coming out of these institutions have direct effect.

The institutions need to have a direct lay component and the involvement of Jewish “civilians”.

It was suggested that the demonstration sites need to be direct service institutions.

Perhaps we should start with schools, since we know more about “schooling” than about synagogues.

We need to ask how good something is as a starting point, e.g., early childhood as a starting point even when we didn’t know anything about it.

Synagogues are complicated and “nested”, involving all of the following:

- Early childhood
- Lay leaders
- School

It seems we should start with 2 different kinds of sites at the same time, e.g. a synagogue as an educational community or a day school.

We need to have a direct service institution in order to demonstrate a model of teaching and learning.

Early childhood is not a good first choice, since it is the “poor cousin” of education, and we want to address the Jewish “masses” in order for CIJE to be taken seriously, though early childhood could be a second choice.

Day schools are politically problematic today since people will think that we advocate day schools as the only way to solve the problems of Jewish education.

Community day high schools was suggested.

Family education was also raised since we need to affect adults. Education is not about the next generation – it is about us, and synagogues have the advantage in that respect, though they are very complex.

What is the relationship between the demonstrate sites and the overall plan and development of the 6-month workplan?

People want to see living examples. Demonstration sites can be very inspirational. It brings the rhetoric to life, and gives people something real and powerful to debate about.

It looks like our field sites have become demonstration sites.

Summary:

There is a general consensus that we should do a demonstration site next year, and maybe with some tie-in with TEL, e.g.:

- Day high school
- Synagogue
- Early childhood

By January 1999, we plan to choose an institution and hire a full-time person to run the site.

Community mobilization – do we have the right group of projects in this category? It was raised that foundation people need to be affected and that there are not part of any of the projects listed under Community Mobilization. The lay leadership pilot is direct community mobilization, and the Forum affects a lot of different people. Economics of Jewish education is an important project since people become involved by giving money.

Community mobilization is about ideas. Lay leaders are happy to be associated with and exposed to great intellectual ideas, but they don't necessarily want to read them.

It was asked how the idea of demonstration sites promotes integration. One response was that demonstration sites affect community mobilization, rather than the other way around.

How are things connected? If they are not connected, how do they fit into the 5-year plan?

We should think about JEWEL attendees as possible field site directors. If we do a synagogue as the demonstration site, then we have to have rabbis in the JEWEL pilot. We should switch our thinking from the students to the field sites. We need students who will take ideas and methods back to the site. E.g., Synagogue 2000 and success of mobilization and interest of lay leaders.

Developing a program for lay leaders is a crucial part of our work. In order to create a context (for change), we need to affect how lay leaders think about Jewish education.

Staff was asked to think about which projects we should add to, take away from, or change in the 1999 workplan in the rest of the 1998 workplan. It was raised that there are some projects, like the Conference on Rabbinic Education, to which we have already committed ourselves, but we could consider if we want it to be part of our on-going work.

Suggested as a new project in R&D was a study of informal education, what is important for informal educators to know and do.

It was raised that we need to keep a best practices project on the workplan in order to set standards of what "good" looks like, even though this kind of project is not currently popular.

On the list of suggested additional projects (Chart E) is a marketing study of interest in Jewish education vs. economics. It was asked if it could be done via NJPS by adding some our questions. It was suggested that the professors group would be a good sounding board for this.

It was suggested that we might want to publish a curriculum on lay leadership development after the Baltimore lay leadership pilot.

Library – writing up and dissemination

Implicit in our list of projects are the following:

- Demonstration sites
- Community mobilization
- Building capacity

It was asked how Susan's work will impact the future of the professors group

The status on JTS is that they liked KAB's proposal. They met with a former McKinsey colleague who will be working on CFWW, and they loved her, and she is currently rewriting the proposal. This will test out if CFWW concept will work. JTS will continue through 1999.

On publications, it was asked what publications will be needed before and after the Forum, JEWEL planning. Sally Gottesman's research would make an interesting publication.

The lead person for each project is to come up with a strawman/vision of what it could be.

Perhaps we should use the "spokes of the wheel" model to show how projects relate to each other, as opposed to dividing up projects by staff. We should unpack each project by what it is and then its tasks. How do these projects relate to the "concept" and then how do they relate to each other?

An update on Early Childhood was given. GZD and Fran Jacobs have not yet been able to get enough work done to call people together for a consultation. The possibility of putting it off was raised, but there was concern that it has been put off already. We are hoping that a consultation would result in a person to do the project. We need to do the ground work for a consultation and hold the consultation in 1998.

Concern was expressed about the lack of connection between the earlier discussion on the philosophy of the workplan and the current discussion of the list of projects.

# 1998

# 1999

## JEWEL

Planning

TEI

Professors

Forum

Rabbinic Conference

High School Leaders

## CFWW

Planning

Torah Umesorah

Shearim

JTS

## R&D

Indicators

Economics of Jewish Ed

Early Childhood

Change

- Synagogue Change

- Think Tank

Lay Leadership Research

Pilot - Professional

Pilot - Lay

Planning

TEI

Professors

Forum 2000

Rabbinic Conference

High School Leaders

Conference, Launch

JCCA

Shearim

Other Pilots

JTS

Indicators/Eval Institute

Economics of Jewish Ed

Field Site

Field Site

Lay Leadership  
Research

# 1998

## ADMIN

External Communication

Internal Communication

Fundraising

Board & Chairman's Council

## PUBLICATIONS

Teachers Report

Leaders Report

Brochure

Strategic Plan

# 1999

External Communication

Internal Communication

Fundraising

Board & Chairman's Council

Policy Brief on Professional  
Development

Beit Rabban

Rabbinic Education

- Think Tank on Leadership
- Network of TEI Graduates
- Internet ↑
- Publications Related to R&D
- Leveraging Academic Publications
- “Big Ideas” Publication

# Institutional

## DEMONSTRATION SITES

TEI

Synagogue Change

Early Childhood

# Communal

## COMMUNITY MOBILIZATION - POLICY

Forum

Publications

Economics of Jewish Education

Indicators

Lay Leadership Pilot

Lay Leadership Research

# Individual

## BUILDING CAPACITY FOR THE FUTURE

JEWEL Plan

Lay Leadership Pilot

CFWW Plan

Professional Pilot

TEI

Rabbinic Conference

High School Leaders

- Community High School in the Fall?

- Study of Informal Education
- The Movie
- Marketing Study of Interest in Jewish Ed vs. Economics
- Library
- Forum Publications



11

STARS

4

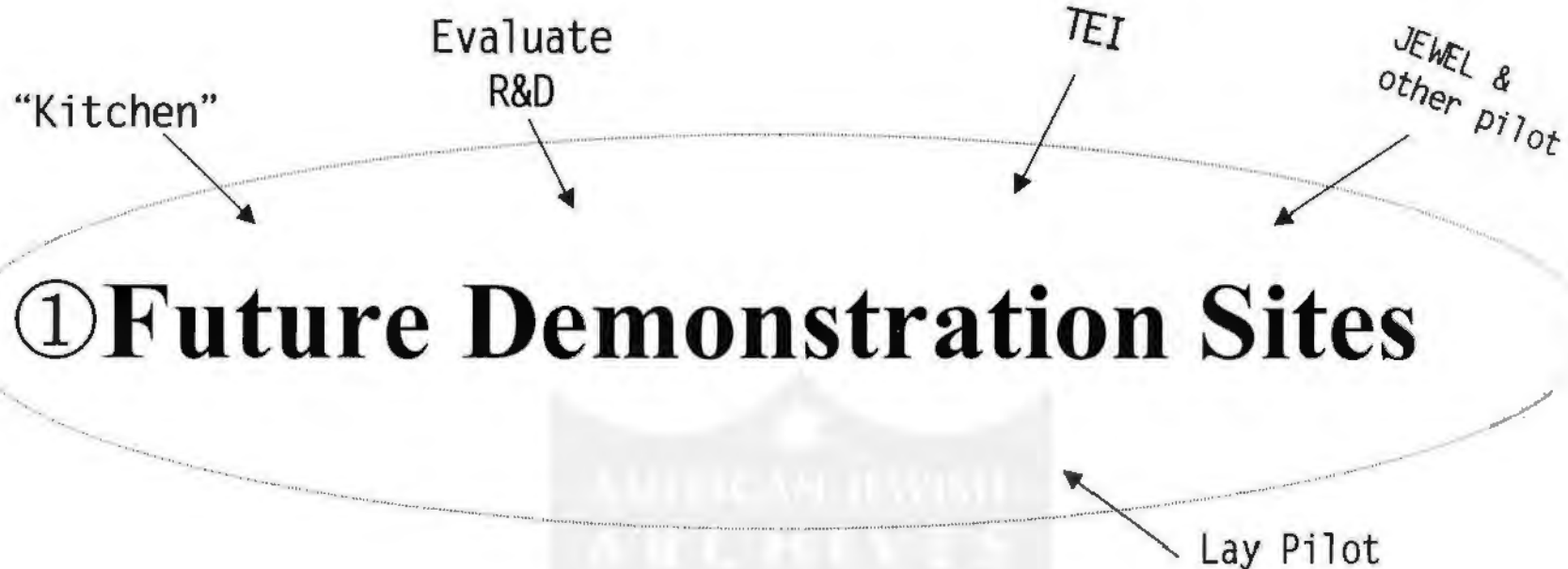
STARS FROM 4 NEW YORK  
SYNAGOGUES

2 BOSTON SCHOOLS

→ LAY

→ RABBI

- ① Stars Program
- ② Baltimore Leaders -  
Big Foundation - Lay & Prof
- ③ Synagogue (or Schools Project)  
Leadership Training  
Lay & Prof



**② Influence Communal Policy**

- Forum
- Research
- Publications

**③ Create (& pilot) JEWEL**

- Lay
- Prof

**④ CFWW**

# MEMO

**To:** CIJE Colleagues  
**From:** Nessa Rapoport  
**Subject:** Adult learning  
**Date:** June 30, 1998

This article from *Reform Judaism* (Summer 1998) seemed applicable to several CIJE projects (synagogue change, professors, forum, lay leadership research, and more).

*Nessa*

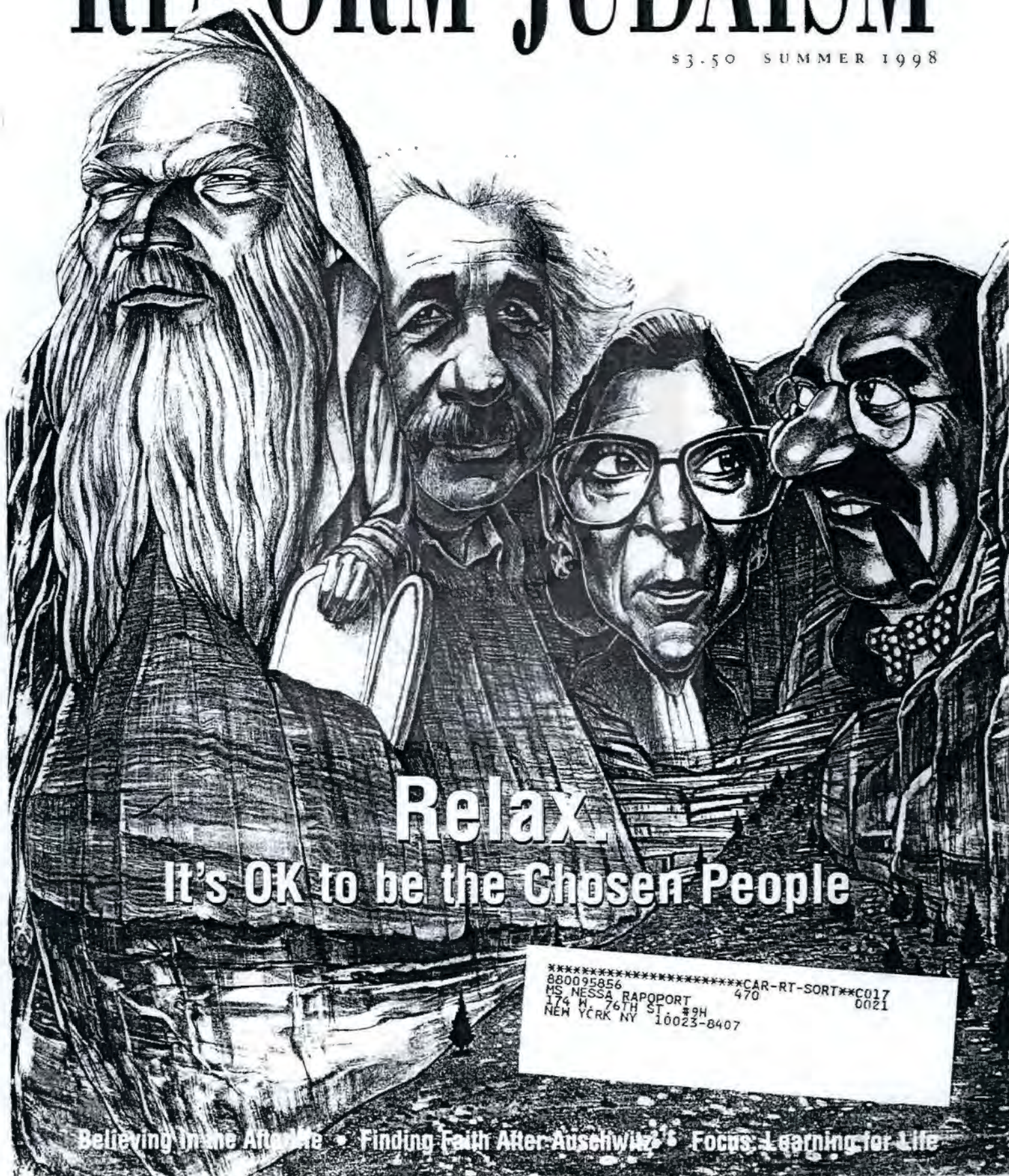




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# What Congregations Need to Know About the Adult Learner

BY DIANE TICKTON SCHUSTER AND ISA ARON

Our membership has expressed an interest in intensive adult education. Forty people say they would attend a mid-week early morning Torah study group. What, you wonder, will this diverse group want to learn? What should you (the educator, rabbi, cantor, or the adult education chairperson) know about adult learning and text study? What are the best strategies for delivering a program that will engage congregants?

What *are* achievable goals for Jewish adult learners? What should synagogues know before developing programs to meet these goals?

## Lessons from Tradition

Our tradition offers some direction. Most of us have participated in text study at the Passover seder, when we communally read and discuss the Exodus

story. As a model for text study, the dynamics around the seder table contradict what many of us have come to associate with study. Indeed, university-educated adults tend to believe that learning is best accomplished when one sits alone in a quiet library. But our ancestors believed that the most effective learning occurs when people engage in thoughtful, open dialogue in pairs or groups. Text study comes alive when thinking individuals bounce ideas off one another, when everyone's opinion counts and multiple perspectives are offered. In the words of philosopher Franz Rosenzweig, we must move from "life to Torah," allowing our experiences in the wider world to illuminate the lessons of text and allowing the text to illuminate our life experience.

Our forebears recognized that individuals learn in different ways, according to their needs, interests, and experiences. In the *haggadah*, the idea of learner diversity is represented by the four sons who range from the wise to the silent, the cynical to the innocent.

In the synagogue setting of today, the wise son\* (*hakham*) may be

\*The traditional *haggadah* refers to sons; we construe it to include both daughters and sons



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symbolized by the congregant who already has learned to read Hebrew and/or has had some experience with text analysis, midrash, or Talmud study. He tends to be a self-directed learner who is ready to probe more deeply into the fine points of Jewish law or practice.

The rebellious son (*rasha*) represents the skeptic who asks, "What do these texts have to do with me? Why should we spend time rehashing this old material, when there is pressing temple busi-

ness that needs our attention?"

The innocent son (*tam*) might signify the spiritual seeker. Rather than being interested in the particularities of the text, he may be grappling with rough questions. "How can these texts help me to understand myself as a Jew and help me to find greater meaning in my life?"

The son who does not know even what to ask (*she-aino yodei-a lish-ol*) might be a congregant who was raised in a totally secular household, a

woman discouraged from receiving a Jewish education, a man who suffered a humiliating experience with text study when preparing for his bar mitzvah, or perhaps a person who was raised to believe that only scholars and rabbis are qualified to be "at the table."

## Lessons from Literature

Adult learners tend to be highly initiatory, self-directing volunteers who want their learning to be applicable to life situations. When they discover such connections, they become excited about the content and are often eager to take on new learning challenges. At the same time, many adults do not trust their ability to retain new information or ideas and need encouragement, reinforcement, and support. Once past the initial awkwardness of new learning, most prefer active, experiential learning activities that move them beyond lectures and a fixed curriculum. As they gain a sense of mastery, they wish to design their own learning agendas and share their knowledge with others.

To remain engaged in learning activities, adults expect to be afforded a number of courtesies. They tend to be very self-protective about their time commitments and expect efficiency, convenience, flexibility and physical comfort in the learning setting. Many want to be provided with an overview of material or ideas that will sustain them if they cannot study on a regular basis. Some insist upon individualized learning programs.

## Lessons from Research

The lessons of the "four sons" paradigm were echoed in a survey of fourteen Reform synagogue lay leaders after they had studied Jewish text for the first time. At first, many of the respondents felt hesitant and anxious about being "exposed" as Jewishly illiterate. A synagogue board member who owned her own business reported: "I felt total fear, like I was a little kid. You don't want to look stupid. And you look around and you wonder who's confident and who's maybe as ill-equipped as you are."

Our research, conducted as part of the Experiment in Congregational Educa-

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tion, revealed that collaborative study techniques, such as working in *hevruta* (with a partner) and using well-structured questions, helped these adults to overcome their initial discomfort. Through structured text-study exercises, the leaders came to relish the challenge of unpacking the text and translating its precepts in contemporary terms. They were intrigued that the issues they were studying had been important to earlier generations of Jews, and surprised by the wide range of accessible Jewish sources. They valued the atmosphere of candor that evolved among group members and appreciated their rabbis' willingness to disclose how various texts had affected their own lives.

Some of the men and women indicated that they were on a personal quest for meaning and were amazed at how text study could be tied to spiritual reflection and growth. Others commented that text study helped them to clarify their Jewish values, connect them to previous generations, and

bring *torat* into their lives.

Almost everyone we interviewed noted that the process of text study seemed to lead to an enriched sense of community. The unifying nature of text study inspired one synagogue president to envision a genuine transformation of synagogue life: "When you bring a group of people together, the discussion is led properly and everybody starts airing their feelings, already you have a new bond. And then you go a step further and start to delve into some history and text, and there's another bond. Soon the chain starts to link together, and then you can build a beautiful fence!"

### Getting Started

In thinking about introducing more text study into your congregation, it is important to help learners set realistic goals, both for themselves and for the community of learners. Recognize that these goals will evolve as more congregants become engaged in learning activities.

### Setting Goals

A learning congregation needs to be cultivated. The following five goals should become part of every congregation's learning agenda:

1. *Textual literacy* is a foundation for all that comes afterward. At its most basic, it involves having some familiarity with the foundational Jewish texts, the key historical figures, and the most important narratives and legal precepts.

2. *Finding personal meaning in the text* is what keeps most learners coming back for more. Textual literacy, in and of itself, is inert, unless we know why we should care about these personalities, events, and laws. Studying text should give us insight into our own lives; conversely, a lifetime of knowledge and experience can be brought to bear on interpreting the text.

3. *Reflection on personal belief and practice in light of what has been studied* is what the prayer book refers to as *torat hayim*, the Torah applied to life. This type of reflection becomes an essential ingredient in how we think about ourselves.

4. *Learning how to study text* is no simple matter. There are a range of interpretive lenses which allow the student to explain seeming contradictions, appreciate historical and cultural contexts, fill in missing pieces of information, and understand the full import of recurrent literary motifs. Learning how to learn allows us to "own" the text.

5. *Creating a community of learners* combines all of these goals. The end point is not to become an educated Jew, but a continually learning one, and to go on to teach others.

Bringing text study into synagogue life is like opening our doors to all who wish to come and share the Passover seder. Through systematic planning and goal setting, each of us, regardless of our level of knowledge, can find a place at the table and begin. □

- **OVER 2 MILLION JEWS STILL LIVE IN THE FORMER SOVIET UNION.**
- **LESS THAN 1 IN 20 HAS EVER PARTICIPATED IN ORGANIZED JEWISH LIFE.**
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### For More Information...

see the chart depicting "Adult Jewish Learning Strategies" on the RJ website:  
<http://uahc.org/rjmag/598.html>



July, 98

We are writing to share the activities we have implemented during the past few months to facilitate our ongoing planning efforts toward the creation of a North American Center for Jewish Educational Leadership (JEWEL).

### THE NEED

It has been clear to all of us for some time that there is a need in the North American Jewish community for such a Center for both lay and professional educational leaders, which can deal with recruitment, preparation and development programs, and placement.

There is a shortage of prepared senior leaders who can inspire, shape, alter and transform communities, institutions and people. Current programs leave important gaps: On the professional side, as our own CIJE study of educators found, only 35% of school leaders have formal preparation in both education and Judaic Studies, while only 27% have a degree or certification in administration or leadership. Furthermore, there are limited opportunities for in-service development for senior leaders and for people changing careers. There are few development programs targeted for lay leaders in Jewish education and there are few organized efforts to recruit lay people into the field.

### THE CONCEPT

We have sponsored a number of consultations that have focused on the fundamental issues in the development of Jewish educational leadership today. Our consultations include close collaboration and deliberations with our colleagues at CAPE and the Mandel Institute. We have called upon additional outside experts including Professors: Michael Rosenak, Hebrew University; Judith McLaughlin, Harvard University; and Mike Milstein, University of New Mexico.

These consultations have been instrumental in helping us begin to develop a foundation of ideas that could inform an approach to leadership preparation and development for North America.

These ideas include:

- This center must establish an ongoing link between ideas, scholarship and feedback from the field.
- Our approach rests on integrating Jewish text study with the development of a personal vision \*\*of leadership and specific leadership tools.
- Our approach affirms the importance of linking institute activities with ongoing mentoring and supports in the field.
- The center should provide opportunities for the preparation and development of both lay and professional leaders jointly and separately.

These consultations have lead to an initial conceptual plan that outlines what a National Center for Jewish Educational Leadership may entail:

Such a center would provide an integrated approach to the recruitment, placement and development of senior lay and professional leaders who are able to vitalize, energize and

influence Jewish education in North America. The target groups to be served will include both current and potential professional and lay leaders.

The center will have three closely linked functions:

- recruitment and placement
- leadership preparation and development
- planning for personnel needs

Examples of possible programs in these areas could include:

#### Recruitment and Placement

1. Matching searches
2. Databases, web sites
3. Career counseling and planning

#### Leadership Preparation and Development

1. Long term programs
2. Fast track fellows programs
3. Alumni networking
4. Seminars for leaders of training institutions
- 5 Teacher Education Institute

#### Personnel Planning

1. Community/ Institutional consultations
2. Conferences

### PLANNING PROCESS

We are in the middle of the first phase of our planning process for JEWEL. We are pleased to report that our colleagues at CAPE and the Mandel Institute have agreed to join us in this planning effort.

To date we have begun a number of data gathering activities.

1. We have commissioned papers to review the field of leadership preparation and development in four domains (not in the Jewish world):

- a)educational leadership – Mike Milstein, Professor of educational leadership, University of New Mexico
- b)business – Terry Bacon, President, Lore International
- c)board/lay leadership development –Nancy Axelrod, Vice President, A.T. Kearney (global management consulting executive search firm)
- d) not-for-profit/public service –Dennis Young, Professor of non-profit management, Case Western Reserve University

2. Additionally, we are mapping the current leadership development offerings in the Jewish community for both lay and professional leadership. Sally Gottesman, a freelance consultant and researcher with extensive experience working in the Jewish community, is working with Karen Barth and Ellen Goldring on this phase of the work.

3. Pearl Beck, who is a senior research fellow of the City University of New York, has begun to research lay leadership in Jewish education to better understand what are current practices and what the needs are in this area.

4. We are also reviewing feedback from our earlier pilot programs.

We anticipate that this first phase of planning will be completed in October 1998. At that point, we will draft a concept paper, which begins to more clearly define the objectives, philosophy and programs for JEWEL.

During the next phase of our planning process, we will visit best practice sites that are identified by the commissioned papers and conduct a needs assessment in the field. Based on this new information, we will modify the concept paper and begin to address the practical issues of creating JEWEL as an institution.

#### FLAGSHIP PILOT PROGRAM

To test and implement the ideas that are emerging from the JEWEL planning process, we are developing a professional pilot program for senior leadership from a wide variety of settings (e.g., school leaders, senior agency professionals, camp directors). This pilot will be the springboard for implementing the principles developed and codified in the planning phases enumerated above.

The target audience for this program will be senior and highly experienced professionals from a wide variety of Jewish educational settings. The pilot will be an intensive two-year program, including a core curriculum and individual study and tutorial components to meet specific goals for each participant. One important component of this work will include mentoring participants and consulting with some of their institutions. The initial program will target leaders in the contexts of their institutions and will include several seminars that will involve professional leaders with their key lay leaders as well.

Our work on other JEWEL pilots is continuing to move forward. These pilots include:

- The Forum
- The pre-GA lay leadership pilot
- The conference on rabbinic education
- TEI – Cohort 3
- The professors group

We looking forward to further discussion about JEWEL at our forthcoming board meeting.

Draft 7/26/98

## Consulting Firm Without Walls WORKSHEETS

Based on a Summary and Synthesis of Notes from Meetings (5/28/98, 6/18/98, 7/14/98)

### 1. How do we segment the market?

WHO ARE THE POTENTIAL CLIENTS?		WHY ARE THEY ATTRACTIVE?
<b>Foundations</b> <ul style="list-style-type: none"> <li>• 5 that are really big</li> <li>• 15-25 large ones</li> <li>• Many in the "next" tier</li> </ul>		<ul style="list-style-type: none"> <li>• Number, size, impact</li> <li>• Address wide range of issues</li> <li>• Willingness to spend money on Jewish education</li> <li>• Recognize need for strategic planning</li> <li>• Familiar with using consultants</li> <li>• Some know they need help on both content and process</li> </ul>
<b>Federations</b>		<ul style="list-style-type: none"> <li>• Big cities with complex problems</li> <li>• Potential leaders who serve as role models for others</li> <li>• Provide a network of referrals</li> <li>• Need assistance in their own planning projects</li> <li>• Open to outside help, especially in Jewish education</li> </ul>
<b>Organizations within each community, e.g.</b> <ul style="list-style-type: none"> <li>• Continuity Commissions</li> <li>• Bureaus of Jewish Education</li> <li>• Other</li> </ul>		<ul style="list-style-type: none"> <li>• May be easier for them to identify problems than craft solutions</li> <li>• May welcome objective outsider to facilitate process</li> </ul>
<b>National Institutions that are related to Jewish Education, e.g.</b> <ul style="list-style-type: none"> <li>• Brandeis</li> <li>• HUC, JTS</li> <li>• JESNA</li> </ul>		<ul style="list-style-type: none"> <li>• Set Jewish education as a priority</li> <li>• Have resources for consultants</li> <li>• Some wealthy Board members</li> <li>• Competitive/copycat mentality</li> </ul>
<b>International Agencies</b> <ul style="list-style-type: none"> <li>• Jewish Agency (Israel)</li> <li>• Mexico</li> <li>• South Africa</li> <li>• England</li> </ul>		<ul style="list-style-type: none"> <li>• Size and scope</li> <li>• Importance</li> </ul>
<b>Individual organizations</b>	<b>Schools</b>	<ul style="list-style-type: none"> <li>• Number</li> <li>• Traditional private school issues</li> <li>• Committed constituencies, especially parents</li> <li>• Potential learning and replication</li> </ul>
	<b>Camps</b>	<ul style="list-style-type: none"> <li>•</li> </ul>
	<b>Synagogues</b>	<ul style="list-style-type: none"> <li>• Number and size</li> <li>•</li> </ul>
	<b>Other</b> <ul style="list-style-type: none"> <li>• JCC's</li> <li>• Youth</li> <li>• Adult Ed</li> <li>• Trips to Israel</li> </ul>	<ul style="list-style-type: none"> <li>• Some familiar with using consultants</li> <li>• Relatively self-contained issues and problems</li> </ul>



### 3. Who are the Consultants?

WHAT CHARACTERISTICS ARE IMPORTANT?		HOW DO WE DESCRIBE AND DEFINE THOSE CHARACTERISTICS?	WHAT ARE OUR INITIAL CONCERNS AND ISSUES?
Share core values	Consulting practice	<ul style="list-style-type: none"> <li>• Fact-based analysis</li> <li>• Issue driven workplan</li> <li>• Top management approach</li> <li>• Relationship-building</li> <li>• Work closely with clients</li> </ul>	Where do we find enough professionals who understand, share, and practice according to these values? Are we being realistic?
	Jewish Education	<ul style="list-style-type: none"> <li>• Jewish values</li> <li>• Understands the role of vision in developing great educational institutions</li> </ul>	<p>How do we teach and reinforce these values?</p> <p>What will CFWW do differently from other consulting firms?</p>
An appropriate mix	Knowledge and skills	<p>Substance</p> <ul style="list-style-type: none"> <li>• Jewish knowledge</li> <li>• Education, e.g. program, Jewish curriculum, admissions</li> <li>• Business, e.g. management, strategy, marketing, search, finance and budget</li> <li>• Fund-raising</li> <li>• Other</li> </ul> <p>Process, e.g.</p> <ul style="list-style-type: none"> <li>• Board development</li> <li>• Group dynamics and facilitation</li> <li>• Counseling</li> <li>• Other</li> </ul>	<p>How do we balance</p> <ul style="list-style-type: none"> <li>• Generalists</li> <li>• Content expertise</li> <li>• Process expertise</li> </ul> <p>How do we balance</p> <ul style="list-style-type: none"> <li>• Core consultants</li> <li>• Resource consultants</li> <li>• SWAT teams</li> </ul> <p>How do we use experts and advisors?</p>
	Age and level of experience	<ul style="list-style-type: none"> <li>• Age</li> <li>• Breadth of experience</li> <li>• Depth of experience</li> <li>• Difference market values placed on knowledge and experience</li> </ul>	<p>How do we balance</p> <ul style="list-style-type: none"> <li>• Serving clients with known talent</li> <li>• Building a firm</li> <li>• Encouraging young talent</li> <li>• Real/perceived differences in market value</li> </ul> <p>Do we create a multi-level hierarchy of junior and senior consultants?</p>
	Time and commitment	<ul style="list-style-type: none"> <li>• Full-time and part-time</li> <li>• Long-term and short-term</li> </ul>	
Role of initial group of consultants		<ul style="list-style-type: none"> <li>• To develop strategy and design organizational structure</li> <li>• To work with clients</li> </ul>	<ul style="list-style-type: none"> <li>• Who are these consultants?</li> <li>• How do we work with them?</li> <li>• Do they help design CFWW?</li> <li>• What is our timing for this planning phase?</li> </ul>
Additional questions			<ul style="list-style-type: none"> <li>• How do we motivate consultants to join?</li> <li>• How do we get rid of consultants who are not doing good work?</li> <li>• How do we build and maintain a culture?</li> </ul>



## 4. How do we build the practice?

COMPONENTS	INITIAL THOUGHTS	ISSUES TO ADDRESS
Organizational Structure	<ul style="list-style-type: none"> <li>• Size and growth</li> <li>• Communication among consultants</li> <li>• Relationship to CUE</li> </ul>	<ul style="list-style-type: none"> <li>• Who has done this before?</li> <li>• Initial vs. Long term</li> </ul>
Sources for consultants	<ul style="list-style-type: none"> <li>• PEJE lists</li> <li>• Lists of consultants used by Jewish organizations</li> <li>• List of consultants published in trade press</li> <li>• Membership directories for professional organizations, e.g. CASE, NAIS, NSFRE, NACUBO</li> </ul>	<ul style="list-style-type: none"> <li>• Criteria for initial screening</li> </ul>
Qualifications	<ul style="list-style-type: none"> <li>• Educational background</li> <li>• Consulting training</li> <li>• Years of experience</li> <li>• Employment record</li> <li>• Client references</li> </ul>	<p>Is it possible to set standards that are too high?</p> <p>How do we evaluate candidates' work prior to our experience in working with them?</p>
Level of commitment to CFWW	<ul style="list-style-type: none"> <li>• Establish Core Group of basic management, fund-raising, program evaluation skills</li> <li>• Identify a larger group of "Strangers" who have geographic or subject area preferences</li> <li>• Identify specific resource consultants on narrow topics</li> </ul>	
Professional Development opportunities	<ul style="list-style-type: none"> <li>• Content on specific subjects and topics, e.g. Jewish education</li> <li>• Skill training, e.g. interviewing, problem-solving, presentation format</li> </ul>	<ul style="list-style-type: none"> <li>• Who designs program?</li> <li>• Who pays?</li> <li>• Is this an incentive to participate in CFWW?</li> </ul>
Management and growth of CFWW	<ul style="list-style-type: none"> <li>• Process for new business development</li> <li>• Performance Evaluation</li> </ul>	<ul style="list-style-type: none"> <li>• Who generates the business?</li> <li>• Who "owns" the clients?</li> <li>• Who does the follow-on work?</li> <li>• How does CFWW remove poor performing consultants?</li> </ul>
Financial Plan	<ul style="list-style-type: none"> <li>• Budget and fund-raising plan</li> <li>• CUE initial and on-going investment</li> <li>• Compensation to consultants</li> <li>• Non-financial incentives</li> </ul>	
Image and Reputation	<ul style="list-style-type: none"> <li>• Initial clients experience and referrals</li> <li>• Marketing materials</li> <li>• Speaking engagements</li> </ul>	

**5. Next steps**

<b>TASKS</b>	<b>RESPONSIBILITY</b>	<b>TIMEFRAME</b>
Review and revise these worksheets	Karen, Nancy	June 18, July 8, July 27
Answer the questions that we can answer now	Karen, Nancy	June-July; by e-mail, fax, or phone
Prepare a workplan and timetable for initial tasks <ul style="list-style-type: none"><li>• Potential clients</li><li>• Potential consultants</li><li>• Experience of similar firms</li><li>• Financial plan</li></ul>	Nancy	July
Hire research consultant	Karen	Begin work in August
Meet	Karen, Nancy, Researcher	September 1-2 in New York
Prepare basic informational and marketing materials	Karen	Begin in September
Determine how to kick off the network; or how to just get started on 1-2 clients	Karen, Nancy	September
Draft a more comprehensive CFWW Plan	Nancy, Karen, Researcher, new Director	October



**Consulting Firm Without Walls  
Preliminary Workplan  
July 13, 1998**

Issue	Task	Responsibility	Timeframe
Who are the potential clients?	<ol style="list-style-type: none"> <li>1. Analyze each segment <i>by</i> <ul style="list-style-type: none"> <li>- Size (using various measures)</li> <li>- Complexity of issues/ability to solve</li> <li>- Importance to the growth and development of CFWW</li> <li>- Ability to pay or receive grant</li> <li>- Willingness to work with consultants</li> <li>- Other</li> </ul> </li> <li>2. Identify the most attractive segments           <ul style="list-style-type: none"> <li>- Determine criteria</li> <li>- Rank the segments</li> </ul> </li> <li>3. List 4-5 specific target institutions within these segments</li> <li>4. For each target institution list           <ul style="list-style-type: none"> <li>- Possible issues</li> <li>- Likely CFWW approach to issues</li> <li>- Consulting skills required</li> <li>- Contacts</li> </ul> </li> <li>5. Develop a sales strategy for the most promising target clients.</li> </ol>		

Issue	Task	Responsibility	Timeframe
Who are the potential consultants?	<ol style="list-style-type: none"> <li>1. Determine the categories               <ul style="list-style-type: none"> <li>- Knowledge and skills</li> <li>- Age and level of skills</li> </ul> </li> <li>2. Prepare a master list of individual consultants and firms in each category</li> <li>3. Develop process to select the "best" consultants               <ul style="list-style-type: none"> <li>- Identify criteria</li> <li>- Determine how to qualify specific consultants</li> <li>- Prepare a short list of consultants</li> </ul> </li> <li>4. Create a 2-3 "ideal teams" to address issues of most promising target clients</li> <li>5. Interview the consultants</li> <li>6. Determine how to work with this initial group of consultants</li> </ol>		
What other organizations can serve as models for the CFWW?	<ol style="list-style-type: none"> <li>1. Articulate the key elements/components of CFWW               <ul style="list-style-type: none"> <li>- To start the firm</li> <li>- To build the firm</li> <li>- To be successful over the long-term</li> </ul> </li> <li>2. Identify similar consulting organizations who could serve as models               <ul style="list-style-type: none"> <li>- For-profit consulting firms, e.g. the obvious and the less obvious</li> <li>- Non-profit, e.g. MAG, Support Centers</li> <li>- Volunteer driven, e.g. HBSC/Community Partners</li> <li>- Foundation sponsored, e.g. Ford</li> </ul> </li> <li>3. Develop an interview guide and interview these firms</li> </ol>		

Issue	Task	Responsibility	Timeframe
What is the broad financial plan for the CFWW?	<ol style="list-style-type: none"><li>1. Describe the financial philosophy of this firm, i.e.<ul style="list-style-type: none"><li>- A business, with a bottom-line results orientation</li><li>- A mission-driven program of CDE, with break-even requirements after a reasonable investment period</li><li>- Both of the above, in whole or part</li><li>- None of the above</li></ul></li><li>2. Describe the financial structure of this firm</li><li>3. Design an Excel model that depicts the revenue streams, cost structure, "profits," and investment plan for this consulting business</li><li>4. Brainstorm various revenue scenarios based on assumptions<ul style="list-style-type: none"><li>- Number and type of clients</li><li>- Level and mix of daily consulting rates</li><li>- Mix of clients and engagements</li><li>- Overhead charges</li></ul></li><li>5. Identify necessary investment in start-up, equipment, recruitment, training</li><li>6. Brainstorm various expense scenarios (based on ???)</li><li>7. Develop a 3-year financial plan</li></ol>		

## TEMPLATE FOR WORKPLAN PROJECTS

Project Name: Policy Brief on Professional Development

Team: Team Leader Nessa Rapoport

Leadership team \_\_\_\_\_

Extended planning team \_\_\_\_\_

PA= Program Assistant

	PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
<b>TASK: Project planning</b>			
SUB TASKS:			
• Create Backward map/flowchart	NR/BWH/KAB	CW	7/15-8/15/98
• Create Budget based on template	NR/BWH/KAB	CW	8/1-8/15/98
• Sign-off on budget	NR/BWH/KAB	PA	8/15-9/1/98
	PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
<b>TASK: Edit manuscript</b>			
SUB TASKS:			
• Discuss editorial concepts with author	NR/BWH/KAB		By 10/1/98
• Review draft and discuss	NR/BWH	PA	10/1-10/15/98

substantive editorial issues if necessary				
• Edit draft and return to author		NR	PA	10/1-11/1/98
• Edit/solicit revisions and return to author (can be 3x)		NR/PA	PA	10/15-11/15/98
• Line-edit and return to author to input changes		NR/PA	PA	11/15-12/1/98
• Verify and edit bibliography and citations		NR/PA	PA	10/1-11/1/98 (plus ongoing)
		PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
TASK: Design planning				
SUB TASKS:				
• Meet with designer and conceptualize design		NR, Designer	PA	10/1-11/1/98
• Get sign-off on design		NR, BWH, KAB	PA	11/1-11/15/98
• Revise project budget as needed		NR, PA		11/15-12/1/98
		PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
TASK: Prepare manuscript for publication				
SUB TASKS:				
• Author's disk to CIJE		BWH/PA/NR		11/15-12/1/98
• Proof disk		NR/PA		11/15-12/1/98
• Disk and hardcopy of text		NR/PA	PA	11/15-12/1/98

to designer			
• Proof and edit designed text	NR/PA	PA	12/15-1/15/98
• Communicate changes to designer or input changes	NR/PA/Designer	PA	1/1-2/1/99
• Create master copy and circulate to authors/editors for final revisions	NR/PA		2/1-2/7/98
• Follow up on author/editors corrections	NR/PA/BWH	PA	2/7-2/15/99
• Create master copy of edits and feedback	NR/PA	PA	2/7-2/15/99
• Circulate for final input	NR/BWH /KAB/Staff	PA	2/15-2/21/99
	PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
TASK: Prepare front & back covers			
SUB TASKS:			
• Prepare inside front cover (Description of CIJE)	NR/KAB	PA/Designer	2/1-2/7/99
• Prepare copyright page (copyright and address information)	NR/KAB	PA/Designer	2/1-2/7/99
• Prepare list of CIJE staff, consultants, board, chairman's council, if needed	NR/KAB	PA/Designer	2/1-2/7/99
• Prepare credits page (photographers, editors, other)	NR/KAB	PA/Designer	2/1-2/7/99

	• Prepare bios if needed			
		PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
<b>TASK: Design implementation</b>				
	SUB TASKS:			
	• Sign-off or revise sample pages	BWH/NR/KAB	PA/Designer	12/15-1/15/99
	• Sign-off or revise cover design	BWH/NR/KAB	PA/Designer	12/15-2/1/99
	• Do iris print of cover	NR	PA/Designer	2/1-2/15/99
	• Sign-off on colors	BWH/NR/KAB	PA/Designer	2/1-2/15/98
		PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
<b>TASK: Create dissemination plan</b>				
	SUB TASKS:			
	• Research costs of: mailing lists, shipping methods, mailing houses, envelopes, etc.)	NR	PA/KJ	Initial: 8/1-8/15/98  Follow-up: 2/15-3/1/99
	• Clear or find storage room for boxes	NR/KJ	PA	3/1-3/15/99
	• Create dissemination plan (from contacts database, customers, etc.)	NR/KAB/Staff	PA	2/1-2/15/99
	• Add publication info and abstract to CIJE Bibliography (database)	NR	PA	3/15-4/1/99



	PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
<b>TASK: Finalize print run &amp; costs</b>			
SUB TASKS:			
• Negotiate costs and paper with printer	NR	PA/Designer	2/1-2/15/99
• Sign-off on print number for designer	KAB/NR	PA/Designer	2/15-3/1/99
• Decide on price, where applicable	NR/KAB	PA	3/15-4/1/99
	PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
<b>TASK: Create final production timeline</b>			
SUB TASKS:			
• Once final text is complete, create final production timeline with designer	NR/KAB/Staff	PA/Designer	2/15-3/1/99
	PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
<b>TASK: Dissemination preparation</b>			
SUB TASKS:			
• Create dissemination cover letter	NR/KAB		3/1-4/1/99
• Get sign-off for cover letter	MLM/LP/KAB/NR		3/15-4/1/99



	<ul style="list-style-type: none"> <li>• Prepare database for dissemination plan( clean up, add names or lists).</li> </ul>	NR/KJ	PA	3/1-4/1/99
	<ul style="list-style-type: none"> <li>• Obtain labels or lists from direct mail outlets or other organizations</li> </ul>	NR	PA	2/15-3/15/99
	<ul style="list-style-type: none"> <li>• Check for duplicates between CIJE list and other lists.</li> </ul>	NR	PA	3/15-4/1/99
		PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
<b>TASK: Approve printed publication and coordinate shipping</b>				
	SUB TASKS:			
	<ul style="list-style-type: none"> <li>• Receive and proof "blues"</li> </ul>	NR	PA/Designer	3/15-3/25/99
	<ul style="list-style-type: none"> <li>• Receive 50 copies of publication via Federal Express as soon as printed</li> </ul>	NR	PA/Designer	3/25-3/31/99
	<ul style="list-style-type: none"> <li>• Approve printed publication</li> </ul>	NR	PA/Designer	3/25-3/31/99
	<ul style="list-style-type: none"> <li>• Upon approval, fax printer address (CIJE, Mandel Institute, mailing house if appropriate) and shipping instructions (UPS, Fedex, etc.)</li> </ul>	NR	PA/Designer	3/25-3/31/99
		PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES

<b>TASK: Archive publication records</b>			
SUB TASKS:			
<ul style="list-style-type: none"> <li>For our files, get a copy of the percentages and swatches on each publication</li> </ul>	NR	PA/Designer	4/1/99-4/15/99
	PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
<b>TASK : Coordinate mailing &amp; distribution</b>			
SUB TASKS:			
<ul style="list-style-type: none"> <li>Distribute to 1<sup>st</sup> tier (CIJE staff, board, Chairman's Council, MPP, Mandel Institute)</li> </ul>	NR/KAB	PA	4/1-4/7/99
<ul style="list-style-type: none"> <li>Coordinate mailing to 2<sup>nd</sup> tier (Contributors, photograph subjects, credits).</li> </ul>	NR	PA	4/7-4/15/99
<ul style="list-style-type: none"> <li>Update CIJE communication tools</li> </ul>			3/1-4/1/99
<ul style="list-style-type: none"> <li>Coordinate mailing to 3<sup>rd</sup> tier through mailing house.</li> </ul>	NR/KJ	PA	4/15-5/1/99
	PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
<b>TASK: Process bills and invoices</b>			
SUB TASKS:			

TASK: Project evaluation	• Process bills and invoices	NR	PA	On going
		PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
	SUB TASKS:			
	• Plan evaluation	NR/KAB		4/1-5/1/99
	• Conduct evaluation	NR/KAB		
	• Report on evaluation			



## TEMPLATE FOR WORKPLAN PROJECTS

**Project Name** TEI COHORT III

**Team:** Team Leader Gail Dorph

**Project Manager** Elie Holzer

**Leadership team** Deborah Ball, Sharon Feiman-Nemser, Sarah Feinberg, Anna Richert, Leah Strigler

**Extended planning team** Susan Stodolsky, Renee Wohl

		PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
<b>TASK:</b> Complete Recruitment		GZD/SDF		July 98/September 98
	<b>SUB TASKS:</b>			
	• Communicate with contact people			
	•		• Find site • Find caterer • Sign contracts	July-September 98
	•			
<b>TASK:</b> Faculty Consultation		GZD/Team	• travel/hotel arrangements • consultant forms • budget form • expense reports • catering	October 98
	<b>SUB TASKS:</b>			

<b>TASK:</b> Plan/design/implement two seminars			
	• Gather materials		
	• Write agenda		
	<b>SUB TASKS:</b>		
	• plan program	GZD w/ team	Logistical arrangements (SDF/NS) <ul style="list-style-type: none"> <li>• prior travel</li> <li>• caterer/hotel/conference center</li> <li>• participant coordination</li> <li>• set up teleconferences</li> </ul> November 98—January 99  Feb 99—April 99
	• budget	SDF/GZD	<ul style="list-style-type: none"> <li>• Consultant forms (NS/SDF)</li> <li>• Contracts (SDF/GZD)</li> </ul> Nov 98/Feb 99  Aug—Sept 98/Nov 98/Feb 99
	• prepare materials	GZD w/ team	<ul style="list-style-type: none"> <li>• Collect (NS)</li> <li>• Xerox (NS)</li> </ul> Dec 98—Jan 99/Feb 99—March 99
	• create letter/send materials	GZD/SDF/NS	<ul style="list-style-type: none"> <li>• format letter</li> <li>• mail merge</li> <li>• Xerox</li> <li>• mailing</li> </ul> Nov—Dec 98/Feb—March 99
	• run seminar	GZD w/ team	Logistical arrangements <ul style="list-style-type: none"> <li>• travel</li> </ul> Jan 17-20, 1999/April 25-28, 1999

		<ul style="list-style-type: none"> <li>meeting room setup</li> <li>onsite Xeroxing and last minute errands</li> </ul>	
• Notes	LZS		Jan—Feb 99/April—May 99
• Follow-up communication/materials	GZD/SDF/NS	<ul style="list-style-type: none"> <li>Collect</li> <li>Xerox</li> <li>Mail</li> </ul>	Feb 99/May 99
<b>TASK:</b> Meetings with lay/professional leadership of community/institutions participating in TEI		Coordinate meeting dates	
<b>SUB TASKS:</b>			
• Design schedule/curriculum	GZD/team	<ul style="list-style-type: none"> <li>Set up teleconferences</li> <li>Budget</li> </ul>	
• Prepare materials	GZD/NS	<ul style="list-style-type: none"> <li>Gather</li> <li>Xerox</li> </ul>	
• Send materials	NS	<ul style="list-style-type: none"> <li>Mailing</li> </ul>	
• Implement seminar	GZD/Others	<ul style="list-style-type: none"> <li>Travel/hotel arrangements</li> </ul>	
<b>TASK:</b> Plan/design/implement Israel seminar			March 99—August 99
<b>SUB TASKS:</b>			
• Plan program	GZD w/ team	Setup teleconferences Logistical arrangements	March—June 99

		<ul style="list-style-type: none"> <li>• Travel</li> <li>• Hotel</li> <li>• Participant coordination</li> </ul>	
<ul style="list-style-type: none"> <li>• Budget</li> </ul>	SDF/GZD/Israel people/KJ	<ul style="list-style-type: none"> <li>• Consultant forms</li> <li>• Expense reports</li> </ul>	March 99 July/August 99
<ul style="list-style-type: none"> <li>• Prepare materials</li> </ul>	GZD w/ team	<ul style="list-style-type: none"> <li>• Gather</li> <li>• Xerox</li> <li>• Mail/pack</li> </ul>	May—June 99
<ul style="list-style-type: none"> <li>• Create letters/send materials</li> </ul>	GZD/SDF/NS	<ul style="list-style-type: none"> <li>• Format letters</li> <li>• Mail merge</li> <li>• Xerox</li> <li>• Mailing</li> </ul>	April 99 June 99
<ul style="list-style-type: none"> <li>• Communicate/plan w/ Israel faculty</li> </ul>	GZD w/ team	<ul style="list-style-type: none"> <li>• Set up teleconferences</li> <li>• FedEx/Airborne</li> </ul>	March—June 99
<ul style="list-style-type: none"> <li>• Run seminar</li> </ul>	GZD/team/faculty	<ul style="list-style-type: none"> <li>• Travel</li> <li>• Participant coordination</li> <li>• Last minute errands</li> </ul>	June 99—July 99
<ul style="list-style-type: none"> <li>• Notes</li> </ul>	LZS		July 99
<ul style="list-style-type: none"> <li>• Follow-up communication</li> </ul>	GZD/NS	<ul style="list-style-type: none"> <li>• Collect materials</li> <li>• Format letter</li> <li>• Xerox</li> <li>• Mailing</li> </ul>	August 99



## TEMPLATE FOR WORKPLAN PROJECTS

**Project Name** TEI EVALUATION

**Team: Team Leader** Gail Dorph

**Leadership team** Sarah Feinberg, Susan Stodolsky, Renee Wohl

**Extended planning team** Deborah Ball, Sharon Feiman-Nemser, Elie Holzer, Anna Richert, Leah Strigler

		PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
<b>TASK:</b> Cohort II				
	<b>SUB TASKS:</b>			
	• Interview 17 members	RSW		July 98 – Sept 98
	• Draft/distribute report	RSW	Distribute report (NS) • Fax • Xerox	Sept 98 – Oct 98
	• Code baseline data	SDF		July 98
<b>TASK:</b> Cohort III				
	<b>SUB TASKS:</b>			
	• Gather/code baseline data	SDF		July 98 – Aug 98
	• Develop interview protocol	RSW, SS, GZD		Oct 98



• Interview ____ members	RSW		
• Draft/distribute report	RSW	Distribute report (NS) • Fax • Xerox	Nov 98 – Dec 98
• Interim interviews	RSW		??

## TEMPLATE FOR WORKPLAN PROJECTS

**Project Name** Teacher Educator Association

**Team: Team Leader** Gail Dorph

**Leadership team** Deborah Ball, Sharon Feiman-Nemser, Sarah Feinberg, Elie Holzer, Anna Richert, Leah Strigler

**Extended planning team** Susan Stodolsky, Renee Wohl

		PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
<b>TASK:</b>				
Create/Manage Network of Alumni		GZD/SDF		
	<b>SUB TASKS:</b>			
	• Create Listserv			
	• Manage Listserv			
	• Work on TEI page on website			
<b>TASK:</b>				January 99 – April 99
Plan/Design/Implement One Seminar				
	<b>SUB TASKS:</b>			
	• Plan Program	GZD and Team	Logistical Arrangements (SDF/NS) • Prior travel • Caterer/hotel/conf erence center	January 99—March 99

		<ul style="list-style-type: none"> <li>• Participant coordination</li> <li>• Set up teleconferences</li> </ul>	
<ul style="list-style-type: none"> <li>• budget</li> </ul>	SDF/GZD	<ul style="list-style-type: none"> <li>• consultant forms (NS/SDF)</li> <li>• Contracts (SDF/GZD)</li> </ul>	January 99  August—September 99
<ul style="list-style-type: none"> <li>• Prepare materials</li> </ul>	Gzd/team	<ul style="list-style-type: none"> <li>• Collect (NS)</li> <li>• Xerox (NS)</li> </ul>	February—March 99
<ul style="list-style-type: none"> <li>• Create letter/send materials</li> </ul>	GZD/NS	<ul style="list-style-type: none"> <li>• Format letter</li> <li>• Mail merge</li> <li>• Xerox</li> <li>• mailing</li> </ul>	February 99
<ul style="list-style-type: none"> <li>• Run seminar</li> </ul>	GZD/team	Logistical arrangements <ul style="list-style-type: none"> <li>• Travel</li> <li>• Meeting room setup</li> <li>• Onsite xeroxing and last minute errands</li> </ul>	March 7-10, 1999
<ul style="list-style-type: none"> <li>• Notes</li> </ul>	LZS		March 1999
<ul style="list-style-type: none"> <li>• Follow-up communication/materials</li> </ul>	GZD/NS	<ul style="list-style-type: none"> <li>• Collect</li> <li>• Xerox</li> <li>• Mail</li> </ul>	April 1999

## TEMPLATE FOR WORKPLAN PROJECTS

**Project Name** TEI VIDEO

**Team: Team Leader** Gail Dorph

**Leadership team** Sarah Feinberg, Mark Rosenberg, Leah Strigler

**Extended planning team** Deborah Ball, Sharon Feiman-Nemser, Elie Holzer

		PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
TASK: Read/synthesize other video materials		LZS		
	SUB TASKS:			
	•			
	•			
	•			
TASK: Gather feedback – Morah Junger		LZS		
	SUB TASKS:			
	• Oral			
	• Written			
	•			
TASK: Create Morah Serlin Package				
	SUB TASKS:			
	• Decide format of tapes	LZS/GZD/team		
	• Choose/create clips	LZS/GZD/MR/team		

	<ul style="list-style-type: none"> <li>Team meeting</li> </ul>	Whole team	<ul style="list-style-type: none"> <li>Travel/hotel arrangements</li> <li>Xerox materials</li> <li>Consultant forms</li> <li>Budget</li> <li>Order food</li> </ul>	
	<ul style="list-style-type: none"> <li>Develop/edit supporting materials               <ul style="list-style-type: none"> <li>Facilitator's Guide</li> <li>Additional Clips</li> <li>Classroom documents</li> <li>Text materials</li> <li>Transcripts</li> </ul> </li> </ul>	LZS/GZD/MR		
	<ul style="list-style-type: none"> <li>Reproduce/distribute package (incl. letter)</li> </ul>	LZS/MR	<ul style="list-style-type: none"> <li>Format letter</li> <li>Gather/xerox materials</li> </ul>	
	<ul style="list-style-type: none"> <li>Gather feedback (oral and written)</li> </ul>	LZS		
<b>TASK:</b> Mentoring Tapes		LZS		
	SUB TASKS:			
	<ul style="list-style-type: none"> <li>Decide if footage is useable</li> </ul>	LZS		
	If yes— <ul style="list-style-type: none"> <li>Create clips</li> <li>Transcripts</li> <li>Classroom documents</li> <li>Facilitator's Guide</li> </ul>	LZS/MR		
	If no—		<ul style="list-style-type: none"> <li>Budget form</li> </ul>	

	<ul style="list-style-type: none"> <li>• Find site</li> <li>• Shoot footage</li> <li>• Create supporting materials               <ul style="list-style-type: none"> <li>- Facilitator's Guide</li> <li>- Additional Clips</li> <li>- Classroom documents</li> <li>- Text materials</li> <li>- Transcripts</li> </ul> </li> </ul>		<ul style="list-style-type: none"> <li>• Expense reports</li> <li>• Travel/hotel arrangements</li> </ul>	
	Gather feedback	LZS		
<b>TASK:</b> Team Meeting				
	SUB TASKS:			
	• Distribute materials	LZS		
	• Write agenda	LZS/GZD		
	•		<ul style="list-style-type: none"> <li>• travel/hotel arrangements</li> <li>• consultant forms</li> <li>• budget form</li> <li>• expense reports</li> <li>• catering</li> </ul>	
<b>TASK:</b> Distribute Mentoring Package				
	SUB TASKS:			
	• Write letter	LZS		
	• Assemble package	MR	1	
	• Mail	MR		

## TEMPLATE FOR WORKPLAN PROJECTS

Project Name **Conference on Rabbinical Education**

Team: Team Leader **Karen Barth**

Leadership team **Cippi Harte, Jessica Holstein**

Extended planning team **Gail Dorph, Dan Pekarsky**

		PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
TASK: Site selection	SUB TASKS:			
	• Gather sites information	JSH		April – May 98/completed
	• Visit prospective sites	JSH		Aug 98
	• Narrow choice	Leadership team		Sept 98
	• Bring to planning group for discussion	PCH		Oct 98
	• Kosher caterer	JSH/PCH		Sept 98
	• Select	JSH/PCH		Oct 98
	• Design meals	JSH		Dec 98
	• Choose date (Feb 7-9)			May – June 98/completed
TASK: Institutional Involvement	SUB TASKS:			
	• Connect with each institution individually	KAB/PCH/JSH		Feb – March 98/completed
	• Develop list of invitees	PCH/JSH		Oct – Nov 98



		PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
<b>TASK:</b> Institutional Involvement (continued)				
	• Invite rabbinical institutions to participate in conference planning process			Feb – April 98/completed
	• Convene planning committee meeting			May 98/completed
	• Material for conference registration	JSH		Oct 98
	• Fees for conference	KAB/PCH		Oct 98
<b>TASK:</b> Develop final budget				
	<b>SUB TASKS:</b>			
	• Estimate planning costs	KAB, leadership team		Sept 98
	• Estimate conference costs	KAB, leadership team		Sept 98
<b>TASK:</b> Program/curriculum				
	<b>SUB TASKS:</b>			
	• Convene and schedule program committee meeting	PCH/KAB		July 98/completed
	• Design curriculum/program	KAB/GZD/DNP/PCH /JSH		Aug 98
	• Present to planning committee	KAB/PCH		Oct 98
	• Finalize/modify program	KAB and leadership team		Nov 98



		PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
<b>TASK:</b> Program/curriculum (continued)				
	• Invite presenters/ "outsiders"	KAB		Nov 98
	• Phone call with follow-up letter	PCH/JSH		Nov - Dec 98
	• Identify material/ equipment for conference	PCH/JSH		Dec 98 – Jan 99
<b>TASK:</b> Research				
	<b>SUB TASKS:</b>			
	• Identify research needs	KAB, planning committee		May 98/completed
	• Develop list of rabbinical institutions to contact	Researcher		Aug 98
	• Develop list of rabbis in the field to contact	Researcher		Aug 98
	• Design interview protocol/template	Researcher		Aug – Sept 98
	• Identify individuals to contact	Researcher w/KAB		Aug 98
	• Create database	JSH		Sept 98
	• Hire researcher	KAB		Aug 98
	• Do research	Researcher		Sept – Oct 98

		PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
<b>TASK:</b> Research (continued)				
	<b>SUB TASKS:</b>			
	• Write up results	Researcher		Nov – Dec 98
	• Present at conference	Researcher		Feb 99
<b>TASK:</b> Printed materials				
	<b>SUB TASKS:</b>			
	• Design letter to institutions to explain the project and invite	KAB/PCH/JSH		Feb 98/completed
	• Develop questionnaire/ response form to accompany letter	JSH		Feb 98/completed
	• Conference invitation to be developed with registration form, location, hotel info.	PCH/JSH		Sept 98
	• Collect institutional material and distribute to participating institutions (planning committee)	JSH		June – Aug 98

		PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
<b>TASK:</b> Evaluation				
	<b>SUB TASKS:</b>			
	<ul style="list-style-type: none"> <li>Hire/assign someone to think about evaluation measures</li> </ul>			
	<ul style="list-style-type: none"> <li>Develop pre-post guidelines</li> </ul>			
	<ul style="list-style-type: none"> <li>Poll, interview, etc. to group before conference</li> </ul>			
	<ul style="list-style-type: none"> <li>Poll, interview, etc. to group after conference</li> </ul>			
<b>TASK:</b> Follow-up				
	<b>SUB TASKS:</b>			
	<ul style="list-style-type: none"> <li>Committee to discuss follow-up plans/activities</li> </ul>	KAB w/leadership team, planning committee		Oct 98 – Feb 99

TO: CIJE STAFF  
FROM: DP  
RE: GUIDING PRINCIPLES

**Background.** As most of you know, our evolving "Guiding Principles" document was presented for discussion to the professors during the June Professors Seminar. Present for this discussion were Bill, Anna, David Purpel, David Kaplan, and Susan. In introducing the document for discussion, I suggested that the effort to generate Guiding Principles is informed by a number of hopes:

1. that the process would help us to clarify and deepen our fundamental convictions;
2. that we would emerge with articulated standards to which we could hold ourselves accountable in a more systematic way than would be possible in the absence of articulated standards;
3. that the emerging Guiding Principles might help to announce to various audiences what we represent as an organization interested in quality Jewish education.

After this introduction but before looking at the CIJE draft-document, those present were invited to articulate "guiding principles" that would be high on their list, were they asked to characterize quality-Jewish education. After sharing their respective ideas, the group, which also included Barry, Gail, Cippi, and myself, studied the CIJE document Chevruta-style and then reported back reactions and questions to the group. Sub-groups were asked to react to the document with attention to adequacy of formulation, credibility of the principles, omissions, etc.

**Outcome of session.** Though the session was late in the day and folks seemed tired at the outset, soon -- especially when we moved into Chevruta -- the energy-level picked up, and the overall session was animated and very rich. **Particularly useful was giving the participants the opportunity to study the document in Chevruta, and I would actually recommend doing the same exercise with our board.**

I had a chance to touch base with all but Susan individually and to listen, along with other CIJE staff, to comments in the group. Overall, I think the professors seemed very high on this document, with favorable comments made both about substance and formulation. Equally important, a number of comments were made that may be helpful to us as we refine the document. Some of these comments are summarized below:

- a. Missing from the document, for more than one person, were references to action (ma'aseh!); this point was also raised by E.

Holzer several weeks earlier. That is, the activity of teaching and learning, as found within the Guiding Principles document, seems very self-contained -- with quality education leading to continuing desire for and engagement in quality-education. It was felt that more needs to be said about how this education deepens and enriches one's life as a Jew (beyond the teaching-learning situation). **Of particular importance to one or two people was the document's silence on the question of social responsibility; the suggestion was made that we should go on record with the view that an essential outcome of quality-Jewish education is that the learner grows more dedicated to the pursuit of social justice and the reduction of human suffering.** It was suggested that this concern could be incorporated in at least two places: first, in the principle concerning "vision at the heart", a reference could be made to Tikkun Olam; second, the experiential learning section might speak about, or use examples that point to, Tikkun Olam activities.

b. Related to a., some felt that in the effort to establish the centrality of Jewish texts, we may have over-emphasized them and not left enough room for other elements of Jewish education, for example, social action activities which could prove powerful learning experiences. And while nobody challenged the idea of Torah li'Shmah, some felt that text study as more than just an end-in-itself (i.e. as leading to transformed Jewish living) needs to be stressed.

c. To some, the document may have had too much of a "What can Judaism do for the individual?" quality, with insufficient emphasis on what, through Jewish education, the learner can contribute to the Jewish community and to humankind.

d. One person noted that the document does not speak to the relationship between Jewish education and our identities as Americans and citizens of a world facing serious global issues.

e. A couple of individuals were troubled by some of the language in the document: i) "student" and "graduate" sounded too pediatric to one person, and the reference to "educating institutions" as the site of education seemed too narrow.

f. The reference to "powerful Jewish ideas" in the document led to an effort to articulate some of these ideas. Here is the initial response that came back from members of the group:

i. Human beings are created in the image of God.

ii. "...because we were strangers in the land of Egypt."

iii. Monotheism

iv. Tshuvah.

v. Shabbat.

vi. God is a God of History, concerned with our well-being.

g. The reference to vision in the first guiding principle gave rise to the question: Whose vision is it -- that of the leaders or the participants?

h. It was observed that neither Hebrew literacy nor God figure in this document.

i. It was suggested that the document could be improved through the inclusion of an introductory and concluding paragraph that pulls the document's major themes together into an organic whole. It was suggested that the introductory session should contextualize the guiding principles in relation to CIJE's overall mission and to the situation of American Jewry at this moment in time. It was felt that some of the concerns summarized above might adequately be handled through well-framed introductory and concluding passages.

**DP's response to the professors' reactions.** I thought that the idea of adding a prefatory and concluding comment was excellent, and I was especially struck by the group's observation that education as understood in this document is not sufficiently connected to our life and responsibilities outside the educational arena.

Based on the professors' responses, I have made some changes to the document; most prominently, I've tried to make more of a reference to "ma'asseh"-- to the ethical Deed. What I haven't done yet is to add a preface or concluding comment. I will try to get to this soon -- but in the meantime, I thought this updated version of the document (complemented by the summary of the professors' reactions) might be worth passing by you for reactions.



(could this be used to indicate 4-9-21 inst. ts)  
-an inst. ts w/! / how to identify/needs/opport?

① vision at the heart

② features of learning  
a) as means ends

### CORE THEMES IN CIJE'S APPROACH TO EDUCATION

b) experiential  
c) interactive

③ learning community  
d) continuity of T + ts

CIJE's efforts to foster high-quality Jewish education are informed by several powerful and mutually reinforcing ideas.

**Vision at the heart.** The soul of an educating practice or institution is a guiding vision that identifies in a compelling way its paramount aspirations. An adequate guiding vision points to the attitudes, knowledge-base, dispositions, and skills to be encouraged in the learner. An adequate vision is grounded in serious encounters with powerful Jewish ideas that concern the nature and moral challenges of Jewish and human existence in the cosmos, in history, and in contemporary America. Such a vision, if genuinely shared, energizes the participants and provides an indispensable basis for educational decision-making and evaluation. A vision is a **guiding** vision only to the extent that it permeates the entirety of an institution's life, from hiring practices, to architecture, to daily learning experiences, to budgetary decisions.

**Learning -- both the means and the end of education.** In an adequate educating institution the activity of learning is intrinsically rewarding, while meaningfully contributing to the student's growth and daily experience as a Jewish human being as interpreted by its community's guiding vision.

We think it likely that if the student's learning-experiences regularly satisfy these demanding standards, the student will develop into a person with the capacity and disposition to engage in serious Jewish learning regularly and enthusiastically. This is important because we believe that however differently various sub-groups understand the aims of Jewish education, Jewish education should always aspire to empower and dispose the student to be a learning Jew, whose activities as a learner guide and enrich his or her approach to life.

**In multiple ways, powerful learning is experiential.** Because, in both in form and content, it is responsive to the learners' experiences of life and addresses their living concerns, understandings, and beliefs, powerful learning is engaging and personally meaningful.

Powerful Jewish learning enlarges and deepens the learners' understanding and appreciation of their experience as Jews, American citizens, and members of the human community in settings that range from the family, Jewish communal settings, the work-place, and nature. Jewish learning should interpret, strengthen, and deepen our understanding of ourselves as morally challenged to respond to the human needs and the suffering found within Jewish and the broader human community.

Powerful learning is often generated, enriched, and tested by experiences and activities out in the world. These include opportunities to take on significant ethical challenges and to learn to interpret them in Jewish terms; other kinds of projects that require one to plan, implement, and learn from an effort to address a real world problem under real-world conditions; and immersion-experiences in settings and activities that are culturally, religiously, or historically significant. Accompanied by opportunities for reflection, experiences of this kind have the potential to stimulate, deepen, and complement more traditional, text-based learning. For some learners such experiences may prove a primary mode of learning at some stages of their development; and for many students they prove essential elements in a balanced learning-diet that also includes other forms of learning.

**Education is about making and discovering meaning.** Judaism speaks powerfully to the human being's need for spiritual and other kinds of meaning, and a central challenge of education is to make its voice, or voices, meaningfully accessible to the student.

Education is deeply rewarding when the learner is engaged in trying to make sense of an intriguing but perplexing text, question or situation, and when his or her deepest questions concerning God and the meaning of our existence can be voiced and heard.

Education is exhilarating when reflection and discussion culminate in insights that make sense of a troubling text, question, or situation, or enrich the meaning of the learner's lived experience, or offer the learner a glimpse of a transcendent reality.

Education is empowering when it culminates in the acquisition of skills and sensibilities that enable the learner to find or create these kinds of meaning in new kinds of situations.

**Powerful learning is interactive.** Powerful learning results from the dynamic interaction between the sensibilities, concerns, interpretive schemes, and skills of the learner and the features of the encountered situation, be this situation a text, a task, or a social situation. A central challenge of educator is to structure the form, content, and social context of learning in a way that renders this interaction a source of growth for the learner; meeting this challenge requires careful planning based on an in-depth understanding both of the subject-matter and of the learner in his or her many dimensions.

Powerful learning is also interactive in another sense. A major source of the insights it generates, and of the excitement and sense of well-being that accompany it, is unscripted give-and-take between teacher and student and between students. Such give-and-take enhances the intellectual, social, and spiritual

rewards of learning.

**Educating institutions are learning communities.** Educating institutions are to be understood not as shells in which teaching and learning go on but as **learning communities**. They are learning communities in that all of their members -- young and old, teachers and students -- view themselves and others as both learners and sources of learning. Through their shared efforts, they create meanings that would not have arisen through isolated, individual inquiries.

Educating institutions are learning communities in that the activity of learning together is an intellectually, socially and spiritually rewarding activity which binds the participants to one another.

Educating institutions are learning communities in that the educators whose vocation is to teach within them are committed to the kind of reflective practice and careful evaluation that eventuate in professional growth and in more thoughtfully designed norms, policies, and practices.

**Centrality of Jewish texts and ideas.** At the heart of Judaism are powerful texts that have sustained and enriched Jewish life across the generations. Jewish human beings should have the opportunity to be deepened and to grow through meaningful encounters and struggles with the powerful questions, stories, images, perspectives and ideas that abound in their textual tradition; and they have the right to acquire the skills and dispositions that will empower and dispose them to engage in a life-long conversation with these texts. It is the responsibility of the Jewish community to offer its members educational opportunities that will secure this right and bring them to view Jewish texts as lifelong companions and as sources of meaning and guidance.

We understand "texts" to include classical literature like the Torah and the Talmud, but also other forms of Jewish cultural creativity that include novels, poems, and philosophical tracts. "Texts" also include the products of Jewish creativity in other art forms like dance, film, and the plastic arts.

**An alternative formulation of "Centrality of Jewish texts and ideas":**

**Centrality of Jewish ideas and texts.** We understand Jewish tradition as a conversation about the most important things which every Jewish human being has the right to be a part of. Within this historical conversation can be found insights, questions, and ways of thinking that have the potential to challenge, deepen, and transform our understanding of our situation in the world and our challenges as Jewish human beings.

These ideas are to be found in classical Jewish texts like

the Torah, the Siddur, and the Talmud, as well as in other products of Jewish cultural creativity including novels, poems, films, music, and the plastic arts. Jewish practices can also be understood as texts that articulate powerful Jewish ideas.

A central challenge of Jewish education is to facilitate personally meaningful encounters with this textual tradition, the kind of encounters that lead to an appreciation of the ideas it embodies, as well as to a desire and capacity to become, through continuing Jewish living and learning, active participants in the conversation in which these ideas are voiced, interpreted, debated, and expressed in daily life. A hallmark of a successful Jewish education is that the learners come to view Jewish texts as lifelong companions and as sources of meaning and guidance

TO: CIJE staff  
FROM: Dan Pekarsky  
RE: the National Jewish High School Leadership Seminar  
DATE: August 3, 1998

I am sorry not to be able to participate in our Staff Retreat this week. I hope it proves productive and otherwise rewarding. Since we'll be considering the possibility of cutting certain projects from out of the core of our work, and since my impression is that the National Jewish High School Leadership Seminar is one of the programs that could suffer this fate, I want to use this occasion to explain why I think it is a significant and appropriate CIJE initiative.

**The nature of the project.** As most of all of you know, this project brings together lay and professional leaders from Jewish high schools for periodic conferences designed to encourage serious and content-rich discussions of fundamental questions pertaining to institutional aims and to the relationship between these aims and educational practice. While such questions are especially pressing for emerging community schools, other kinds of institutions also seem to recognize the importance of wrestling with such matters. In any event, a group representing close to ten institutions, including at least three emerging community high schools, participated in a two-day conference at Harvard in March, 1998 that focused on spirituality and Jewish secondary education. Bernie Steinberg of Harvard Hillel and Art Green of Brandeis enriched the group's thinking with, respectively, Maimonidean and Hassidic ideas concerning spirituality, and Joe Reimer offered a developmental perspective on the problem. Based on our own impressions and on formal and informal feedback, our sense is that this conference was extremely successful, and there was a lot of enthusiasm for the idea of meeting at regular intervals. Moreover, representatives of a number of institutions that were unable to participate in the first conference have expressed an interest in being involved with this project. A second conference is scheduled for this coming November, to be preceded by a planning meeting on August 17 in New York. The planning group will include myself, Danny Lehmann, and David Purpel, who have been guiding this project up to the present, as well as representatives of several of the participating institutions.

**Pertinent considerations.** Several considerations favor CIJE support of this project:

1. The National Jewish High School Leadership Seminar is, in a significant sense, the Goals Project in action. It brings together a cluster of educating institutions that seem hungry for the kind of thinking that the Goals Project has been trying to encourage, i.e., careful thinking about goals and their relationship to practice, informed by Jewish sources and rich conversation among the critical stake holders of participating institutions.
2. A number of participating and potentially participating institutions are at a critical phase of their development. Careful thinking on the part of their lay and professional leadership about their mission and its institutionalization at this stage could be as important as it is rare; for CIJE to contribute to this effort would be a great service. There is reason to think that seminar-related activities may result in a measure of institutional change grounded in serious reflection about vision and its relationship to practice; indeed, some seminar activities are being developed so as to encourage greater thoughtfulness and practical initiatives "in the field". A pertinent by-product is the potential PR value — in particular, our ability to point to another significant instance of "making a difference" in the field.

3. Some of the leaders associated with these institutions have the power to shape educational practice not only in their own institutions, but also, through their participation on the boards of other institutions and community agencies, in other arenas. One of the expectations animating the National Jewish High School Leadership Seminar is that these individuals will, through the seminar, come to think in new ways about their challenges as Jewish educators and as champions of Jewish education and about how best to approach to these challenges. In this way, the project is designed to build capacity for Jewish education.

4. This project allows us to build fruitful relationships with a number of interesting secondary schools around the country. Since part of the project's conception is that participating institutions will, as part of their participation, launch and document appropriate experimental ventures, this project may give rise to fruitful pilot-projects from which we will learn a lot. Moreover, some of these projects may turn into demonstration-sites that testify to the power of serious thinking about fundamental purposes.

5. There is a lot of enthusiasm concerning this project on the part of critical individuals. Danny Lehmann and myself have found it exciting, and it is proving a fruitful way of engaging David Purpel in CIJE's work. As mentioned above, participant-response (both lay and professional) to the first conference has been very gratifying. And Mike Rosenak, to whom Karen B. and I mentioned the project in Israel recently, seemed very interested in it, and eager to participate in some fashion in the late winter.

**Next steps.** As I understand it, CIJE is committed to this project at least through the November conference, and our deliberations concern the wisdom of a continuing commitment to the project -- and if so, what kind -- beyond November. As suggested above, I personally think that it would be worthwhile for this project to continue. But I am certainly aware that our resources are scarce, and that it would be best if we could find significant external support for the project in the future. Much of the cost of the upcoming November conference will be covered by an anonymous donor who is interested in the project. Whether this is a one-time gift or a long-term commitment is not yet clear. If it is a long-term commitment on his part to partner with CIJE on the financing of this project, this might make it considerably easier for CIJE to support this effort.

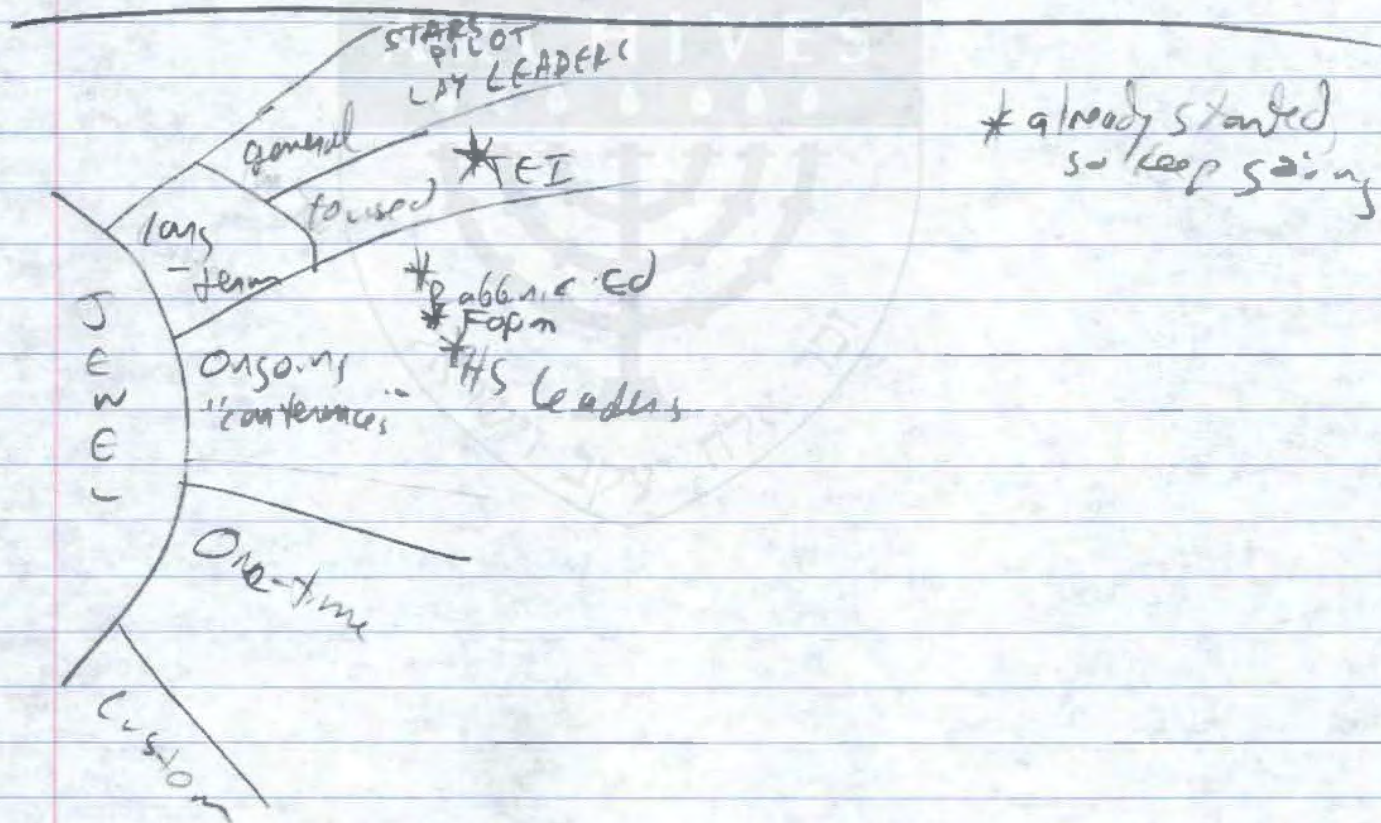
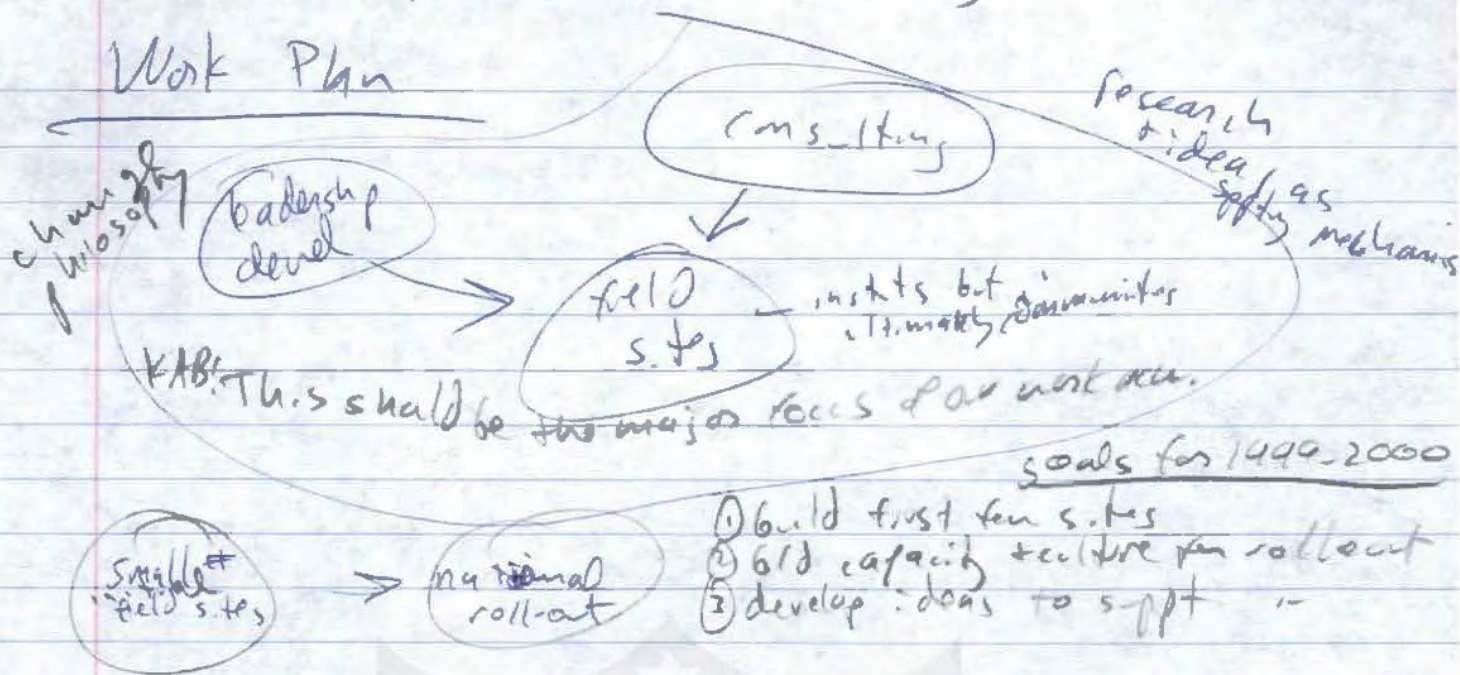
We are also in conversation with the AviChai Foundation about the possibility of their partnering with us on this project. It is not clear yet whether they are interested (KAB and I will be meeting with them on the 18th of August); but even if they are, we would need to make sure that the price of partnership is not a serious distortion of the project's conception.

**DP's recommendation.** I am personally very interested in this project and think it has rich potential to forward our work as an organization. For me, the best-case-scenario is that the anonymous donor will declare himself ready to undertake a long-term commitment to this project by splitting the cost with CIJE, and I think this matter needs to be explored. In the worst case scenario (i.e., this donor is unwilling to view his commitment as long-term, and the AviChai Foundation proves uninterested in the kind of Leadership Seminar we are interested in encouraging), I would still be hopeful that CIJE would offer significant support for this project; but it may make sense to defer any decision on this matter until we have concluded discussions with potential partners and until we have had a chance to undertake and evaluate the November conference.



Aug 5-6 staff meeting

# Work Plan





CRITICAL  
FLAGSHIP  
JEWEL SEARS PILOT

CORE/EARLY -- 1st group core got started early

RABBINIC ED  
TEI COHORT III

PLANNING  
JEWEL PLANNING  
GRAND PLAN  
EARLY CHILDHOOD

SUPPORT  
RESEARCH & PUBLICATIONS

COMMITTED  
FEB RABBINIC CONF  
TEI COHORT III

REDUCE/ELIMINATE  
HASHAAIR



# Work Plan Projects

all cases (by work  
dropped out of CFW  
from old ed. 6th.

## First order

Critical  
CFW Launch  
Jewel Pilot  
Field site Pilot  
Balt. Lay Leadership P. lot?

Supports

Syn Research  
Change Think Tank  
Lay Leadership Research  
Professors

Planning

Jewel Planning  
Field site Planning  
Research Planning

TEI  
HS Leaders  
Rabbinic Ed post. Feb.  
Forum

Evaluation

Indicators

[other evals embedded  
inside projects]



## Research Agenda for 1999

disorganised, messy

[postpone team of JED for one yr  
- tell HL need help in change area first]

Syn ch  
lay Leadership

research papers on 6lds the profession

research may end up as a global action in the sector

# **AGENDA FOR WORKPLAN DISCUSSION**

**8/6/98**

## **I – GUIDING PRINCIPLES (9:00-9:45)**

## **II – THE OVERALL WORKPLAN (9:45 – 11:15)**

1. Presentation of a proposal categorization of our workplan
2. Discussion of priorities

## **III – INDEPTH DISCUSSION OF VAGUER PROJECTS (11:15-12:15) (1:00-2:30)**

1. Field Sites
2. Baltimore lay leaders
3. Research Projects
4. Publications
5. The "Grand Plan"

## **IV – BRIEF DISCUSSION OF MORE REFINED PROJECTS (Overview, quick review of talks, discussion of key issues) (2:30 – 4:00)**

1. Forum (15 min)
2. CFWW (15 min)
3. Indicators (30 min)
4. TEI (30min)

## **V – VERY BRIEF DISCUSSION /UPDATES (4:00-4:30)**

1. High School Leaders
2. Rabbinic Conference
3. Hashaar
4. Torah Umesorah
5. Early Childhood

## **VI – NEXT STEPS (4:30-5 pm)**

## **GUIDING PRINCIPLES -- AN ALTERNATE APPROACH**

The extant approach to the Guiding Principles is in a significant sense very organic; as an example, individual principles make reference to aims as well as to beliefs about process. An alternate approach might more sharply distinguish between the aims and the process of education; and it might also include a section on necessary conditions. Schematically, such an approach might look like this:

### **EDUCATIONAL AIMS**

**Vision at the heart.** The soul of an educating practice or institution is a guiding vision that identifies in a compelling way its paramount aspirations. An adequate guiding vision points to the attitudes, knowledge-base, dispositions, and skills to be encouraged in the learner. An adequate vision is grounded in serious encounters with powerful Jewish ideas that concern the nature and moral challenges of Jewish and human existence in the cosmos, in history, and in contemporary America. Such a vision, if genuinely shared, energizes the participants and provides an indispensable basis for educational decision-making and evaluation. A vision is a guiding vision only to the extent that it permeates the entirety of an institution's life, from hiring practices, to architecture, to daily learning experiences, to budgetary decisions.

**Diversity of visions.** While vision is essential, the rich diversity of Jewish life renders it undesirable and impossible to identify any single vision that will meet the needs of varied sub-groups. A challenge for all educating communities, and for those who would help them, is the development of a vision that expresses its Jewish outlook.

**Shared elements.** While committed to diversity, CIJE is committed to certain trans-ideological educational aims, aims which, though differently interpreted, must be a part of any adequate guiding vision. These elements include:

- a. Jewish education must strive to give learners the skills that will empower them to take responsibility for their own learning, and to nurture their desire to engage in life-long learning.
- b. Jewish learning should enrich the lives of students in ways that will influence their activities and the quality of their experience in day-to-day life.
- c. Jewish education should strive to initiate the learner into a life-long conversation with the texts, debates, and



ideas that are at the heart of Jewish civilization.

d. Jewish education should nurture in learners a deep understanding of the ethical imperatives at the heart of Judaism, as well as the impulse and the disposition to strive for social justice and to reduce human suffering

e. Jewish education should strive to nurture in the learner respect for individuals and groups that embody other visions of Jewish life, especially in the face of genuine disagreements.

## THE PROCESS OF EDUCATION

a. Powerful learning is experiential. It is responsive to the background of experience and beliefs that the learner brings to the learning-situation, and it includes opportunities for "informal education" in a variety of contexts.

b. The process of learning should at one and the same time be intrinsically rewarding and contribute to the learner's growth as an experiencing and acting Jewish human being.

c. Powerful learning is interactive. Powerful learning results from the dynamic interaction between the sensibilities, concerns, interpretive schemes, and skills of the learner and the features of the encountered situation, be this situation a text, a task, or a social situation. A central challenge of educator is to structure the form, content, and social context of learning in a way that renders this interaction a source of growth for the learner; meeting this challenge requires careful planning based on an in-depth understanding both of the subject-matter and of the learner in his or her many dimensions.

Powerful learning is also interactive in another sense. A major source of the insights it generates, and of the excitement and sense of well-being that accompany it, is unscripted give-and-take between teacher and student and between students. Such give-and-take enhances the intellectual, social, and spiritual rewards of learning.

d. At their best educating environments are learning communities. Educating institutions are to be understood not as shells in which teaching and learning go on but as learning communities. They are learning communities in that all of their members -- young and old, teachers and students -- view themselves and others as both learners and sources of learning. Through their shared efforts, they create meanings that would not have arisen through isolated, individual inquiries.

Educating institutions are learning communities in that the

activity of learning together is an intellectually, socially  
and spiritually rewarding activity which binds the  
participants to one another.

Educating institutions are learning communities in that the

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## **CONDITIONS OF QUALITY JEWISH EDUCATION**

1. Leadership, lay and professional....
  2. Evaluation....
  3. A guiding vision [though this repeats first section]
- etc.

"almost an emergency"

SAN FRANCISCO



encourage to attend

better to come for 2 days  
than not come at all

Fandut & Hilly SF take kindly

- move ahead on 3 fronts  
in area of equities

- leadership education  
- solid base w/ needs

- research

- a more focused effort

- develop a more  
systematic program

- if come - would be  
key person to discuss

- a third part, an  
intelligence unit

- consulting

- MF is trying to instill itself

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11:30pm Tor + A

1 am T&A TOR



## TEMPLATE FOR WORKPLAN PROJECTS

**Project Name** JEWEL Pilot Planning

**Team: Team Leader** Gail Dorph/Ellen Goldring

**Leadership team** Karen Barth, Sarah Feinberg, Cippi Harte

**Extended planning team** Pearl Beck, Sally Gottesman, Elie Holzer, Barry Holtz, Dan Pekarsky, Nessa Rapoport, Leah Strigler, Research Director

		PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
<b>TASK:</b> Create descriptive PR document which describes goals, characteristics and parameters of program		EG/GZD		8/98—10/98
	<b>SUB TASKS:</b>			
	• Describe goals, characteristics and parameters of program			
	• Create PR piece describing program		Duplicate/distribute document to team	
<b>TASK:</b> Identify and recruit program participants		GZD/BWH/LZS +PT		
	<b>SUB TASKS:</b>			
	• Create criteria for application and acceptance of		•	



	participants			
	• Develop application procedure			
	• Develop fee structure			
	• Interview potential participants		<ul style="list-style-type: none"> <li>• Travel/hotel arrangements</li> <li>• Budget</li> <li>• Expense reports</li> </ul>	
<b>TASK:</b> Develop Curriculum		EG/GZD/BWH/EH + faculty team		
	<b>SUB TASKS:</b>			
	<ul style="list-style-type: none"> <li>• Develop modules/ideas on the following topics: Development of personal vision</li> <li>• Jewish texts and philosophy</li> <li>• Educational theory and practice</li> <li>• Creating learning communities</li> <li>Leading an institution</li> <li>• Person Leadership Development (e.g. 360 degree feedback)</li> <li>• Goals/vision work</li> <li>• Change processes</li> <li>• The challenge of substance</li> </ul>		Gather/duplicate/distribute materials to team members	

<b>TASK:</b> Identify and recruit faculty				
	<b>SUB TASKS:</b>			
	• Develop administrative team			
	• Develop faculty team			
	• Identify core faculty			
	• Identify adjunct faculty			
	• Identify field faculty			
	• Identify expert consultants			
<b>TASK:</b> Site arrangements				
	<b>SUB TASKS:</b>			
	• Decide venue (university/conference center)			
	• Research/visit/choose site		<ul style="list-style-type: none"> <li>• Budget</li> <li>• Travel/hotel arrangements</li> <li>• Contracts</li> </ul>	

<b>TASK:</b> Logistical frame for the program			
<b>SUB TASKS:</b>			
• Decide on university connection			
• Create a modus vivendi for working with university		Coordinate meetings	
<b>TASK:</b> Develop funding proposal and budget	KAB		
<b>SUB TASKS:</b>			
<b>TASK:</b> Develop administrative structure and requirements for the program			
<b>SUB TASKS:</b>			
<b>TASK:</b> Develop evaluation plan	SS/EG/GZD		
<b>SUB TASKS:</b>			

## TEMPLATE FOR WORKPLAN PROJECTS

**Project Name** JEWEL Planning

**Team: Team Leader** Ellen Goldring/Gail Dorph

**Leadership team** Karen Barth, Sarah Feinberg, Cippi Harte

**Extended planning team** Pearl Beck, Sally Gottesman, Elie Holzer, Barry Holtz, Dan Pekarsky, Nessa Rapoport, Leah Strigler, Research Director

		PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
<b>TASK:</b> Scans (Ed. Leadership, Mandel Programs in Israel, Not-for-profit management, volunteer/board development, business)				July 98-October 98
	SUB TASKS:			
	<ul style="list-style-type: none"> <li>Collect, monitor scans (additional questions)</li> </ul>	LT	<ul style="list-style-type: none"> <li>Thank you notes</li> <li>Consultation forms/honoraria</li> <li>Distribute documents</li> </ul>	
	<ul style="list-style-type: none"> <li>Interview key informants</li> </ul>	LT		
	<ul style="list-style-type: none"> <li>Synthesize scans</li> </ul>			

<b>TASK:</b> Data collection for professional and lay leadership programs in Jewish community				
	<b>SUB TASKS:</b>			
	• Review interview protocol	SG, EG		
	• Review ALOHA documents	SDF, EG		
	• Interview lay leaders	SG	• Set up/ coordinate interviews	
	• Interview program directors	SG	• Set up/coordinate interviews	
	• Write summary document	SG	• Duplicate document • Fax/mail document to team • Thank you notes to participants	
<b>TASK:</b> Lay Leadership Research		Pearl Beck		
	<b>SUB TASKS:</b>			
	• Interview key informants		• Set up/coordinate interviews	
	• Create interim reports for leadership team		• Duplicate document • Fax/mail document to team • Thank you notes	

			to participants	
<b>TASK:</b> Data review consultations				
<b>SUB TASKS:</b>				
<ul style="list-style-type: none"> <li>Plan four meetings to review documents and their implications</li> </ul>		<ul style="list-style-type: none"> <li>Travel/hotel arrangements</li> <li>Budget/consultation forms</li> <li>Set up meeting room</li> <li>Order food</li> </ul>		
<ul style="list-style-type: none"> <li>Create agenda</li> </ul>	EG/GZD	<ul style="list-style-type: none"> <li>Distribute agenda</li> </ul>		
<ul style="list-style-type: none"> <li>Gather and create appropriate documents</li> </ul>	EG/GZD	<ul style="list-style-type: none"> <li>Collect/distribute documents</li> </ul>		
<ul style="list-style-type: none"> <li>Invite outside experts</li> </ul>				
<b>TASK:</b> Develop School of Thought of <b>Jewish</b> Educational Leadership	EH			
<b>SUB TASKS:</b>				
<ul style="list-style-type: none"> <li>Scan Jewish educational leadership (collect/monitor)</li> </ul>		<ul style="list-style-type: none"> <li>Thank you notes</li> <li>Consultation/honoraria forms</li> <li>Duplicate/distribute documents</li> </ul>		
<ul style="list-style-type: none"> <li>Interview key informants</li> </ul>		Set up/coordinate interviews		
<ul style="list-style-type: none"> <li>Synthesize the underpinnings of Jewish</li> </ul>				



	educational leadership			
<b>TASK:</b> Study Group—Jewish texts and educational leadership		EH		September 98-June 99
	<b>SUB TASKS:</b>			
	<ul style="list-style-type: none"> <li>Plan sessions</li> </ul>		<ul style="list-style-type: none"> <li>Duplicate/ distribute texts to study group</li> </ul>	
	<ul style="list-style-type: none"> <li>Write up: What did we learn from Milwaukee Pilot</li> </ul>	DNP, NR		November 98
	<ul style="list-style-type: none"> <li>Keep on-going notes of texts studied and issues raised</li> </ul>			
	<ul style="list-style-type: none"> <li>Create a proposal for text study strategy for JEWEL pilot</li> </ul>			
<b>TASK:</b> Best Practices Site Visits		EG, GZD, ADH, KAB, PCH		
	<b>SUB TASKS:</b>			
	<ul style="list-style-type: none"> <li>Determine sites to visit</li> </ul>			
	<ul style="list-style-type: none"> <li>Visit sites</li> </ul>		<ul style="list-style-type: none"> <li>Coordinate dates</li> <li>Travel/hotel arrangements</li> <li>Expense reports</li> </ul>	
	<ul style="list-style-type: none"> <li>Write brief report on lessons learned/implications for JEWEL</li> </ul>		<ul style="list-style-type: none"> <li>Duplicate/ distribute report</li> </ul>	

<b>TASK:</b> Community needs assessment date			
	<b>SUB TASKS:</b>		
	• Review/revise template	SG, leadership team	• Duplicate/ distribute template
	• Interview key informants	SG	• Setup/coordinate interviews
	• Write summary report of lessons learned	SG	• Duplicate/ distribute report
<b>TASK:</b> Create Revised JEWEL Strawman		EG, KAB	Duplicate/distribute
	<b>SUB TASKS:</b>		
<b>TASK:</b> Create a business plan for JEWEL		KAB, TBD	Duplicate/distribute
	<b>SUB TASKS:</b>		
<b>TASK:</b> Develop/implement a communication plan			
	<b>SUB TASKS:</b>		
	• Update letters to board members		Bimonthly, beginning August 98

# TEMPLATE FOR WORKPLAN PROJECTS

Project Name **Forum**

Team: Team Leader **Karen Barth and Cippi Harte, Chuck Ratner**

Leadership team Gail Dorph, John Colman, Esther Leah Ritz, Steve Hoffman, Lee Hendler

Extended planning team Nessa Rapoport, Dan Pekarsky, Jessica Holstein

Planning partners CJF, JCCA, JESNA (Norbert Fruehauf, Mark Charendorff, Saul Andron)

		PERSONNEL	SUPPORT/ ADMINISTRATIVE TASKS	BEGINNING/ ENDING DATES
TASK: Program				
	SUB TASKS:			
	• Identify program chair	KAB/PCH/leadership team		
	• Select curriculum committee	KAB/GZD/PCH/NR		March 98/completed
	• Identify program content	KAB/GZD/PCH/NR leadership team		May 98/completed
	• Develop list of sessions/speakers	KAB/PCH/GZD leadership team		
	• Map out timing			
	• Invite speakers/presenters	KAB/PCH/GZD/NR leadership team		Spring 99
	• Letters of agreement	PCH/JSH		Spring 99
	• Identify and arrange for "conference" facilitator to handle logistics	PCH/KAB/JSH		Fall 98

<ul style="list-style-type: none"> <li>Identify and arrange for conference "guide"/ wisdom expert</li> </ul>	KAB/GZD/NR/PCH leadership team		Spring 99
<ul style="list-style-type: none"> <li>Pre-materials to be sent to participants</li> </ul>	PCH/JSH		Summer/Fall 99
<ul style="list-style-type: none"> <li>Design and define formal and informal program components including networking opportunities</li> </ul>	KAB/PCH/program committee		Jan – Dec 99
<ul style="list-style-type: none"> <li>Opening – getting to know people               <ul style="list-style-type: none"> <li>Decide on a plan</li> <li>Find a leader</li> </ul> </li> </ul>	KAB/PCH/program committee/leadership team		Jan – Nov 99
<ul style="list-style-type: none"> <li>Closing – how to wrap it up and next steps</li> </ul>	KAB/PCH/program committee/leadership team		Jan – Nov 99

**TASK:**

Logistics – Site Selection

**SUB TASKS:**

<ul style="list-style-type: none"> <li>Identify list of considerations for site (flexibility on space capacity (150-300), kosher)</li> </ul>	PCH/JSH		Fall 98
<ul style="list-style-type: none"> <li>Date – identify other meeting dates (e.g., JCCA Biennial, CJF Quarterly, etc.) to avoid scheduling conflicts</li> </ul>	PCH/JSH		Dec 98
<ul style="list-style-type: none"> <li>Develop chart of potential sites</li> </ul>	JSH		Jan/Feb 99

	<ul style="list-style-type: none"> <li>• Present to committee for decision</li> </ul>	PCH/KAB		Feb 99
	<ul style="list-style-type: none"> <li>• Select and make deposit</li> </ul>	Committee		Feb/March 99
	<ul style="list-style-type: none"> <li>• Sign contract</li> </ul>	PCH		Feb/March 99
<b>TASK:</b> Logistics – Kosher caterer				
	SUB TASKS:			
	<ul style="list-style-type: none"> <li>• Get info about caterers</li> </ul>	JSH		Dec 98 – Jan 99
	<ul style="list-style-type: none"> <li>• Sample food</li> </ul>	JSH		Jan – March 99
	<ul style="list-style-type: none"> <li>• Design menus</li> </ul>	JSH		Fall 99
	<ul style="list-style-type: none"> <li>• Sign contract</li> </ul>	PCH		Spring 99
<b>TASK:</b> Logistics – Travel				
	SUB TASKS:			
	<ul style="list-style-type: none"> <li>• Develop list of who needs to travel and arrangements to be made (participants, presenters, staff)</li> </ul>	JSH		Sept – Dec 99
	<ul style="list-style-type: none"> <li>• Make arrangements with travel agent</li> </ul>	JSH		Spring 99
	<ul style="list-style-type: none"> <li>• Ground transportation</li> </ul>	JSH		Nov 99 – Feb 2000
<b>TASK:</b> Marketing – Print Materials				
	SUB TASKS:			
	<ul style="list-style-type: none"> <li>• Hire PR/communications person/group to handle this</li> </ul>	KAB/NR/PCH		Fall 98



• Design letter			
• Invitation	PR/communications consultant		Fall 98
• Application	PR/JSB		Dec 98 - Jan 99
• Papers to be presented	KAB/NR/PCH/GZD/committee		Sept 98 – Sept 99
• Decide on content, author			
• Make arrangements			
• Letter of agreement			
• Set date due			
• Collect papers			
• Review/make changes			
• Format/distribution			
• Proceedings/taping?			
<b>TASK:</b>			
Marketing – Lay People to Attend			
<b>SUB TASKS:</b>			
• Identify 5-7 communities to host parlor meetings of 5-10 people	KAB/PCH		July 98/completed
• Contact key community contacts	PCH		Aug 98
• Develop plan for each community	KAB/PCH w/community contact		Aug 98
• Set dates for meetings	PCH		Aug – Sept 98
• Travel for PCH/KAB for each meeting	PCH/JSB		Sept – Dec 98



• Collect info. for all potential attendees	PCH		Sept – Dec 98
• Develop database and input data	JSH		Sept – Dec 98
• Designate lay leader to contact each invitee to enhance participation	KAB/PCH/Chuck		Sept 98
• Send follow-up invitational material	PCH/JSH		Nov 98 – Nov 99

**TASK:**  
Marketing – Professionals to Attend

**SUB TASKS:**

- |  |                         |  |                  |
|--|-------------------------|--|------------------|
| • Develop list                           | KAB/PCH leadership team |  | Aug – Dec 98     |
| • Review by committee and advisory group | KAB/PCH leadership team |  | Dec 98- Jan 99   |
| • Contact each professional to invite    | KAB/PCH/GZD/NR          |  | Nov 98 – Sept 99 |
| • Send written material to each          | JSH                     |  |                  |

**TASK:**  
Marketing – Advisory Committee

**SUB TASKS:**

- |                              |                         |  |                    |
|------------------------------|-------------------------|--|--------------------|
| • Professional organizations |                         |  |                    |
| • Select (JCCA, JESNA, CJF)  | KAB/PCH leadership team |  | March 98/completed |
| • Schedule meeting(s)        | PCH/JSH                 |  | July 98/completed  |
| • Hold initial meeting       |                         |  | Aug 98             |
| • Assign tasks               | KAB/PCH                 |  | Aug 98             |

	• Select list of lay leaders	KAB/PCH leadership team		Jan 99 – June 99
	• Invite to October meeting (before board meeting?)	Lay leaders		Sept 98
	• Arrange logistics for meeting	JSH		Sept 98
<b>TASK:</b> Evaluation				
	SUB TASKS:			
	• Assign/hire person to work with committee for purpose of evaluation	KAB/leadership team		Jan – Feb 99
	• Identify desired goals/outcomes	Evaluation consultant leadership team		Feb – June 99
	• Develop measures for goals	Evaluation consultant leadership team		June – Sept 99
	• Administer pre and post instruments	Evaluation consultant		Nov 99 – Jan 2000 April – June 2000
	• Write up	Evaluation consultant		July – Aug 2000
<b>TASK:</b> Follow-up				
	SUB TASKS:			
	• Convene meeting to think through what will happen after – is this something to be incorporated into program planning?	KAB/PCH/leadership team, planning team		Fall 98

<ul style="list-style-type: none"> <li>Committee to discuss and develop follow-up plan</li> </ul>	KAB/PCH/leadership team/planning team		Spring 99
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