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**AMERICAN JEWISH ARCHIVES**  
A DIVISION OF HEBREW UNION COLLEGE – JEWISH INSTITUTE OF RELIGION

**MS-831: Jack, Joseph, and Morton Mandel Foundation Records, 1980-2011.**

Series F: CIJE Accrual, 1981-2011, undated.

Subseries 1: Barry Holtz, 1988-2005, undated.

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Box  
71

Folder  
14

Goals. Israel, 1994.

For more information on this collection, please see the finding aid on the  
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## BARRY'S CONVERSATION WITH DANNY P.

December 14, 1994

### **Cleveland:**

Agnon: Danny will talk with Ray Levi to see what the school is currently thinking about the Goals issue.

Mark Gurvis: CIJE needs to decide if we are going to propose in Cleveland a local goals seminar ala Milwaukee and then we'll contact Mark for his views. Agnon might be involved in this way.

Rob Toren: Danny has been in touch with Toren almost every week about his plan for congregational improvement, so we are on top of Rob's request for help and have been giving to him.

### **JCC Goals:**

Alan H. needs to talk with Allen Finkelstein about this whole thing: Jay Roth, etc.

### **Atlanta:**

Feb 12th: Who is the point person in terms of planning this day???

### **Amy Gerstein:**

Dan would like to discuss his proposal to hire Amy as a consultant to the project. We need to find a context to talk about his thinking in this matter.

**January 5 Meeting** of staff-- Can the Goals Project be a main item on the agenda?

### **Next steps for Danny in Goals:**

Over the next weeks Danny will be:

Reading more in the literature of Sizer, Fullen, etc.

Talking to experts like Fullen, Fred Newman, etc.

Identifying and contacting the people we want as resource people

Planning the learning for the these resource people: towards a meeting in spring and/or summer

Subject: +Postage Due+Enclosure file: MLWDOC  
Date: 13-Dec-94 at 11:06  
From: "Dan Pekarsky", INTERNET:pekarsky@mail.soemadison.wisc.edu  
To: barry holtz,73321,1221  
73321,1217

Sender: pekarsky@mail.soemadison.wisc.edu  
Received: from wigate.nic.wisc.edu by dub-img-3.compuserve.com (8.6.9/5.940406sa  
id LAA08921; Tue, 13 Dec 1994 11:05:48 -0500  
Received: from mail.soemadison.wisc.edu by wigate.nic.wisc.edu;  
Tue, 13 Dec 94 10:05 CDT  
Message-Id: <2EEDC5F0.CF87.0007.000.1@mail.soemadison.wisc.edu>  
Date: Tue, 13 Dec 1994 09:58:00 -600  
From: "Dan Pekarsky" <pekarsky@mail.soemadison.wisc.edu>  
Reply-To: pekarsky@mail.soemadison.wisc.edu  
Subject: Enclosure file: MLWDOC  
To: 73321.1221@compuserve.com  
CC: 73321.1217@compuserve.com, Pekarsky@mail.soemadison.wisc.edu  
X-Gateway: iGate, (WP Office) vers 4.04b - 1032

Dec.11, 1994

#### MILWAUKEE UPDATE

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In a nut-shell, a month or so after the Boston seminar, it continues to elicit strongly enthusiastic on the part of the participants. For most of them, it was an exciting, intellectually and otherwise rewarding experience that they look back on fondly and even with nostalgia. It was not only what they learned and thought about that they valued, but the opportunity to speak with one another in an atmosphere that encouraged trust, reflection, "seeing the big picture," and dialogue, an atmosphere that is hard to recapture in the work-a-day world of everyday life. One of the themes expressed repeatedly in this session was their wish to recreate at home the kind of dialogical atmosphere they felt in Boston.

As for what they learned, thought about, and/or wanted to explore further, here are some principal themes that emerged and that I summarized orally after hearing what they had to say:

1. Many spoke of having acquired invaluable lenses through which to view their own conduct as leaders and that of other educational leaders. "Leadership styles" was a term often referred to. Using the 4 categories identified by Deal, they have been able to look at their own strengths, weaknesses, and challenges in new and very fruitful ways.

2. The discussion concerning "Vision" at the seminar was helpful to the participants. They felt that they became more aware of how important it is to have a vision. At least one participant reported that after the seminar, he had pulled his institution's vision out of the closet and subjected it, in the company of his colleagues, to some serious reflection. He has found

this to be a very revitalizing experience.

3. In relation to the vision-theme, one participant expressed her insight that the search for vision may take us inside ourselves -- that is, that we often already have an operating vision. I used this as an occasion to stress the CIJE view that while looking inside ourselves in this way is necessary and invaluable, the development of a vision should also involve wrestling with the views of others, including Jewish thinkers and denominational representatives, who have struggled with the question of a meaningful Jewish existence. I thought it was important to stress this as an antidote to Barth's overly-introspective approach to developing a personal vision. Nobody seemed to resist my formulation.

4. A number of people noted the difficulty of moving from personal to shared vision. After observing that, in her opinion, the session in Boston dealing with group vision, or building consensus, was not very strong, one person added that perhaps this was no accident (since this was probably the most difficult part of the work). This was certainly an area they wanted to learn more about.

5. While the exercise of thinking about an ideal school was very exciting to one of the participants, she found herself struggling with the implications of this activity for someone like herself who worked in a very less-than-ideal educational setting that would be impossible to tailor to her ideal.

6. One person wondered about whether, despite differences in ideology, there might be universal and non-trivial shared elements that cut across Jewish educational institutions [I was reminded of Rosenak's piece.]

7. A question was raised concerning reliance on categories deriving from general education to understand Jewish educational institutions. Might there be categories within the tradition that might be better-tailored to the task of interpreting and guiding practice in Jewish educational institutions?

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Nobody had any questions or apparent concerns relating to the exercise and I gave them some 10 minutes to work on it. When they were done, I told them that we would not be looking, at least immediately, at the implementation strategies they had concocted. Instead, we would focus on the ways in which the goals-statements I had presented them with were inadequate.

I think this caught some of them by surprise, and it took a couple of minutes before they got into the spirit of critiquing the goals; but soon they seemed animatedly engaged in reflecting on the ways in which these goals were problematic. We began by focusing on the goal related to Hebrew, and within a few minutes were able jointly to articulate the goal's essential vagueness: modern street Hebrew, modern literary Hebrew, Biblical Hebrew, and/or Prayer Book Hebrew? Hebrew as a language of everyday life, as a Holy Language or both? Facility reading, facility praying, facility reading with understanding, facility speaking, facility writing? Etc.

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nonetheless guardedly optimistic about getting these local seminars going this winter. Could be interesting!

I look forward to hearing from you.

From: Daniel Pekarsky at 608-233-4044

To: CIJE at 12125322646

12-12-94 07:57 pm

002 of 008

TO: Alan, Barry, Gail  
FROM: DP

Here is the Milwaukee material I've been trying to send you unsuccessfully via email. I would be grateful if you could inform me as soon as an email transmission accompanied by an attachment arrives straight-forwardly.

I am eager to talk with any and/or all of you concerning the matters alluded to here and in the Gerstein memos (which I hope did arrive ok).

All the best,

D.

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SUMMARY OF CIJE STAFF MEETING ON GOALS PROJECT (with Seymour Fox and Annette Hochstein), New York Nov. 1994

This purpose of this meeting was to arrive at a 1995 Work Plan for the Goals Project that is anchored in an adequate conception of the project. The meeting began with a status-report that focused on three matters: a) outgrowths of the Jerusalem Seminar, with special attention to developments in the represented communities; b) the October plan, developed by the core CIJE staff in October, 1994; and c) recent conversations between Pekarsky, Fox, and Marom which suggested considerations to be considered in our review of the October Plan and the overall conception of the Goals Project. Because the outgrowths of the Jerusalem Seminar and the October plan are described in some detail in the document summarizing the October Staff Meeting, this summary proceeds immediately to item c), which concerns questions posed by Seymour Fox in recent conversations, questions which offer us useful lenses to use in the planning-process.

### SEYMOUR FOX'S QUESTIONS

1. Success. What would Goals Project success look like after, say, 3 years? As noted in our discussion, this could fruitfully be interpreted in two different ways:

a) If the Goals Project is understood as no more and no less than the path identified in our October meetings, what would optimal success look like? What would we have accomplished?

b) Does a) exhaust our expectations of the Goals Project -- or is there more that we hope for that might not be captured in a)? If so, what is this "more"?

Jointly, a) and b) ask us to try to identify the larger conceptions that should inform the Goals Project?

2. What is the relationship between the Goals Project (as articulated in the October meetings) and the work of a) the Monitoring, Evaluation and Feedback Project and b) the Educated Jew Project? More narrowly, how might these projects serve as resources to the Goals Project?

3. The five levels and our work. The Educated Jew Project has identified five intimately inter-related levels pertinent to the work of that project and to the Goals Project. These levels are:

PHILOSOPHY  
PHILOSOPHY OF EDUCATION  
TRANSLATION INTO CURRICULUM  
IMPLEMENTATION  
EVALUATION

At which of these levels does the October Plan operate? Optimally, at what levels should we be

operating?

## EXAMINING THE GOALS PROJECT AGENDA THROUGH "FOX-LENSES"

This examination began with Pekarsky offering two different accounts of what Goals Project "success" might look like. A) The first, prompted by a comment by Annette Hochstein in the first part of the day, set forth some very general long-term goals (that were not, at least by design, tied to the October plan.

B) The second identified what success might look like if we fully exploited the potentialities of the October-plan.

### A) General long-term goals - three were identified:

1. Increasing numbers of institutions organized around a goals-agenda that includes serious wrestling with issues of content.
2. Heavy emphasis in communal planning processes on the place of goals in Jewish education.
3. A National Center for the Study and Development of Goals for Jewish Education (or the "Center for Research in the Philosophy of Jewish Education").

The Center would:

- a) conduct original research concerning the goals of Jewish education, as well as concerning implementation, and evaluation. Such work might, for example, include a Jewish version of the two HORACE books or Carnegie's "The Future As History" chapter;
- b) develop strategies to disseminate its research findings in ways likely to make an impact;
- c) educate key professional and lay constituencies concerning matters pertaining to the goals-agenda;
- d) develop and make available expertise that will inform the efforts of communities and institutions that seek to become more adequately organized around a goals-agenda.

### B) What would success look like for the October Plan?

1. Case-studies of institutional efforts to become better organized around a goals-agenda.

2. Out of the first-order work in institutions and its analysis in the case-studies, we would acquire an articulated body of lore that includes:

- a. strategies and models that can guide efforts at institutional improvement;
- b. identification of skills, understandings, and aptitudes that are needed by those guiding the process of change;
- c. identification of institutional "readiness-conditions" if meaningful change is to take place;
- d. documentation of some of the effects (expected and unexpected) of taking on a goals-agenda;
- e. identification of important issues, tensions, etc. that need to be addressed, either by institutions embarking on a change-process or national organizations like CIJE seeking to catalyze this kind of change.

3. The development evaluation tools (that would be usable in the future by other institutions undergoing a change process). These tools would include:

- a. an instrument for taking an initial snapshot of an institution, a look at reality that focuses on avowed goals, on their implementation, and on educational outcomes;
- b. an instrument for assessing the results of having engaged in a serious effort to become more goals-sensitive.

4. The development of a cadre of resource-people, identified and cultivated by CIJE who have been, and will continue to be involved in helping institutions become better organized around a Goals agenda.

5. From among the institutions identified in #1, a community of partnered institutions each engaged in a goals-agenda and offering their experiences and their ideas to one another on a regular basis.

6. A broad awareness among critical constituencies at a variety of levels concerning the importance of the goals agenda, of its feasibility, of work being done in this area. This dissemination to be accomplished via publications, film, conferences for different constituencies, etc.

## MEF AND THE EDUCATED JEW PROJECT IN THE FULL-BLOWN OCTOBER-PLAN

Monitoring, Evaluation and Feedback. MEF could contribute to the development of the October Plan in a number of ways:

1. MEF could be responsible for the case-studies;
2. MEF could be invited to develop the instruments to be used to assess current reality at the outset of a goals-process and the outcomes of having engaged in this process;
3. MEF could be invited to do the assessments described in #2.

The Educated Jew Project. Were CIJE to proceed with the October Plan, the Educated Jew Project could make a number of important contributions including the following:

1. Asking the Rosenzweigian questions. Not immersed in having to address - and possibly be compromised by - day-to-day political realities, the Educated Jew staff could help CIJE keep focused on some of the basic questions and concerns that are at the heart the Goals Project.
2. The Educated Jew staff could prove invaluable in our efforts to cultivate resource-people for our project or to educate other constituencies.
3. The Educated Jew staff may be able to offer valuable expertise to the 3 to 5 prototype-institutions identified in the October Plan.
4. The Educated Jew Project's papers on the Educated Jew could prove valuable resources to the 3 to 5 prototype institutions. Conceivably, if there is a clear need, the Educated Jew Project could be invited to commission additional papers that address issues that are particularly sensitive in the American Jewish community -- for example, those dealing with the role of women in Jewish life.

## DISCUSSION

Our discussion took place against the general background defined the matters discussed above. Below I summarize some of the major themes and decisions that emerged in our

discussion, and then I conclude with a draft of a work-plan that tries to be faithful to the spirit of our deliberations.

### 1. Supplementing our resources.

The comment was made that CIJE, and the Goals Project in particular, should identify and make maximal use of available resources that exist outside the immediate CIJE orbit. We should, it was suggested, make a careful inventory of such resources/opportunities. Such an inventory would include such individuals and institutions as Israel Scheffler, Mike Smith, and the Wexner Heritage Foundation. There seemed to be significant interest in exploring the last of; the possibilities.

### 2. The Center-idea.

Excitement and anxiety. It became clear in our conversation that many of the things identified as central to our October-plan could be folded into the work of the Center discussed in the larger conception defined by 3 long-term goals. There also seemed to be considerable excitement about such a Center as a home for various Goals-related efforts. But at the same time as the fairly comprehensive agenda identified in preceding discussion seemed exciting, it provoked some serious concern. The work defined this agenda is, to say the least, substantial -- it is much more than CIJE can reasonably take on, given its current shape and priorities. Two nightmares threaten: 1) that we don't do all that the agenda calls for and end up doing a mediocre, or radically circumscribed, or otherwise disappointing job; 2) that we allow the Goals Project to "take over" the energies of CIJE, thus distorting the overall character and direction of the enterprise.

The spinning-off idea. Neither of these options being acceptable, and in the tradition of the Mandel Institute, it was suggested that the Goals Project agenda might best be carried through if it was "released" from CIJE and given a quasi-autonomous status (with strong ties of various kinds to CIJE). This Center would draw on some of the expertise and resources currently invested in CIJE, but it would also develop ties with, and seek out resources from, other institutions and individuals.

Of particular interest was the suggestion that such a Center could be established, in cooperation with CIJE and the Mandel Institute, at Harvard. So interesting was this possibility that Seymour suggested testing out with Israel Scheffler at the end of the week.

Project or Center. There was in this connection some discussion of whether it might be wiser, in our conversations with Harvard, initially to speak in terms of a project that might eventually rise to a Center. This project would in its initial stages focus on 1) furthering and studying our work with a select number of prototype institutions; 2) identifying and educating personnel that would work with such institutions; 3) the development of our own learning-curriculum.

A limited initial agenda. As the preceding paragraph suggests, whether called initially a

Center or a Project, it is not necessary - and probably not desirable - for the new entity to take on "a full plate" from the very beginning. On the contrary, it might initially focus on only of the efforts that might eventually define its character. But it would be important to view these initial efforts, however narrow, in relation the larger plan of action.

Is an independent Center in our interests? It should be noted that while the idea of working towards a quasi-autonomous Center seemed of interest, at various points reservations were expressed. We should, it was implied, proceed with caution, with attention to the possibility that spinning-off the Center might not be in the best interests of CIJE.

Parallel centers. It was suggested that the model under discussion -- spinning off a CIJE effort and turning it into a quasi-independent satellite-center with strong ties to CIJE -- might in the long run also be the way to approach efforts like Monitoring and Evaluation and Educational Leadership. The thrust of this approach is to keep CIJE as a planning and catalyzing institution that does not get bogged down in implementation of the initiatives it helps to bring into being.

3. Who could serve as adequate coaches/resource persons to institutions embarked on a change-process?

One possibility presented at the seminar is that CIJE work with "coaches" who are themselves appointed by and representatives of the institutions that are embarked on the change-process. While this would enormously simplify our work in that we would not have to seek out a cadre of coaches, the suggestion was countered with the observation that it is unlikely that most such institutionally-appointed coaches would be in a position to help their institutions with the content-side of the goals agenda. In response, it was suggested that maybe we need to be thinking in terms of two kinds of coaches -- an institutional representative skilled in process-issues, and a more content-oriented person that CIJE cultivated (folks like Bieler and Gribbetz, Marom).

4. Working with Institutions: at what level does one begin?

It was reiterated that forwarding the Goals-agenda does not require beginning at the level of "philosophy of education." While efforts at the latter level are important for Jewish education, in any given institution the process might well begin at other levels e.g. with their Bible curriculum. Where one begins would need to be decided on a case-by-case basis.

5. Inventory of outstanding commitments.

While we did not feel that our enterprise could be shaped by pre-existing commitments, these commitments need to be honored; and the challenge is to honor them in a way that will forward our own agenda. These outstanding commitments include the following:

- a. 4 seminars in Milwaukee, with the possibility of more intensive work with "graduates" of the seminar that meet our standards for participation at this next stage.
  - b. Agnon??
  - c. Possible involvement with Cleveland's Goals Seminar
  - d. Helping to launch Baltimore's Goals Seminars in the spring (with possible additional expectations flowing out of last summer's promises).
  - e. Milwaukee's JCC??
  - f. Some kind of support to Toren's efforts in Cleveland to develop a goals-agenda with two congregational programs.
6. Other interesting possibilities.
- a. The Atlanta JCC Camp.
  - b. The Baltimore congregational program.
  - c. The new Atlanta Day School possibility.

[PEKARSKY'S TAKE ON] THE SENSE OF THE GROUP: BASIC DECISIONS

1. CIJE should design and establish a Center for Philosophy of Jewish Education.
  - a. The Center will conduct and disseminate the results of research pertaining to the goals agenda. It will cultivate and make available the kinds of expertise that will be useful to institutions and communities undertaking a goals-agenda. It will educate varied lay and professional constituencies concerning the importance and character of a serious goals-agenda. Through such varied activities, it will place the conversation on goals at the center of efforts to improve Jewish education.

b. CIJE's role is to strategize, design, enable, and create this Center, which will eventually exist in a loosely coupled relationship to CIJE.

2. CIJE has promises to keep -- particularly to communities that participated in the Goals Seminar this summer in Jerusalem. These promises must be kept in ways that will forward our broader agenda.

a. To keep our promises means to launch and/or to participate in, and/or to coordinate local seminars in Milwaukee, Cleveland, and Baltimore; to work in some fashion with Agnon; and to engage in an intensive process with institutions that emerge from local seminars as promising candidates for intensive work. Institutions that do so emerge would probably qualify as "prototype-institutions."

b. The impact of keeping these promises, over and beyond our maintaining our trustworthiness, will include increased awareness among participating institutions of the importance of serious attention to goals; a measure of change among some participating institutions; the identification of one or more institutions ready for serious change-efforts; a lot of serious learning on our own part.

3. Developing capacity is a very high priority and must be at the center of our efforts.

a. Developing capacity has at least 3 dimensions: a curriculum of study for CIJE staff; the identification and cultivation of a cadre of resource-people who will work with us; learning more about the nature of the enterprise through work with what we have called prototype institutions.

b. In our first stage, the identification and cultivation of personnel and our own learning-curriculum should have a very high priority. We should not be quick to take on more than one or two prototype institutions at the very beginning.

## GOALS PROJECT WORK PLAN FOR 1995

### 1. Establishment of the Center for the Philosophy of Jewish Education.

- a. Initial conversations between Harvard, Mandel Institute, and CIJE. (Dec. 1994)
- b. Flesh out conception of the Center, the stages through which it would develop, and its initial assignments. (January, 1995)
- c. Develop funding support for the Center.

### 2. Honoring outstanding commitments.

- a. Four Milwaukee Seminars (January - May, 1995)
- b. Participation as planners and possibly as resources in the Cleveland seminar (Dec.'94 - June '95)
- c. Help launch the Baltimore seminars (spring, '95)
- d. Meet with Agnon to conceptualize and to help them begin to implement a goals-agenda. (Jan. - May 1995)
- e. Consult to Toren in his efforts to enter into Goals-focused relationships with local educating institutions. (as needed)
- f. Identifying "prototype-institutions" from among those participating in local seminars and/or other institutions -- i.e., institutions we are prepared to work with intensively (June, 1995). Begin work with these institutions in September 1995.

### 3. Building capacity

- a. Conceptualizing and planning our own learning-curriculum (Nov.-Dec., 1994)
- b. Resource persons
  - i. Identification of 5 to 20 promising individuals (Dec., '94)
  - ii. Recruitment of these individuals (Jan.'95)
  - iii. Development of a summer-seminar for these individuals (Feb. and March, '95)

iv. Summer Seminar for CIJE staff and for resource persons (July '95)

v. Pair resource-persons with prototype institutions (July, '95)

vi. Winter-seminar with resource-persons (Dec.95)

c.. Learning through prototype institutions

i. Begin with one or more institutions to which we may have preexisting commitments.  
(January-June, '95)

ii. If and only if we have sufficient personnel after meeting requirements of #1, identify other institutions. (Summer '95)

iii. Identify institutional representatives who will work with CIJE (Summer, '95) and hold seminar with them (Fall, '95)

BY THE END OF '95:

1. We will have completed local seminars to which we've committed.

2. We will have established the Center for the Philosophy of Jewish Education -- or a project that is moving in that direction.

3. We will have identified from 5 to 15 resource-people to work with educating institutions and/or communities, and we will have participated with them in a process of learning and tooling up.

4. We will have planned and engaged in a curriculum of study designed for CIJE staff (and, if timing is right, for some of the individuals identified as resource-people.

5. We will have identified one or more prototype institutions, either through the local seminars or through other means, and we will have assigned some of our new resource-people to work with these institutions. We will also have begun to work with the person designated by these institutions to work with us.

**COUNCIL FOR INITIATIVES  
IN  
JEWISH EDUCATION**

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From: Dr. Barry Holtz

Organization: Wexner Heritage Foundation

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COMMENTS:

November 8, 1994

Dear Michael,

Here are some thoughts in telegraphic fashion about a CIJE- Wexner Heritage relationship. Please note that this is an "unofficial" reflection. What I'm suggesting is certainly interesting to CIJE. Whether it would fit within current time commitments of staff, etc. is another question. But we ought to explore it, if there is interest on both sides.

1. Wexner Heritage has as its mission the development of a new cadre of lay leadership for North American Jewry. Its main approach to doing so has been developing Jewish study experiences with outstanding teachers and scholars, and by creating mini-communities around such study experiences. Has this approach succeeded in developing the Wexner fellows as communal leaders? My guess is that what has happened is that some-- perhaps many-- fellows have been excited and turned on to Jewish study, but what they are to do with that excitement and how that translates into "leadership" is as yet unclear.
2. CIJE has as part of its mission (cf. A Time to Act, the Mandel Commission report which created CIJE): to "mobilize community support for Jewish education" ie developing lay leadership advocates-- both moral and financial-- for Jewish education. Or to put it in terms very real to Les Wexner: "how do we develop the next Sam Meltons in Jewish life?"
3. What would it take to help an Ilana Ratner, etc. become such an advocate for Jewish education? A love and excitement about serious Jewish study, about Torah learning, is certainly part of this. Here Wexner Heritage has made a great contribution. But more is needed. CIJE would argue: 1) An engagement with Jewish education issues at the deepest level, the big picture: Why be Jewish, what, in Dan Pekarsky's language, is our vision of "a meaningful Jewish existence?"; 2) An understanding of what are the specific policy approaches that communities should adopt to move their Jewish education systems forward. What do we know about "what works" in Jewish/general education? By helping lay leaders confront these issues all the important work that Wexner Heritage has done in the domain of Jewish learning could come to bear fruit in real change in living Jewish communities and institutions.
4. CIJE has been grappling with both of these issues and has something to offer in both arenas. Our experience in dealing with the issues of "the big picture", what we call The Goals Project, has been very positive as we've tried it out so far. Similarly in the second matter-- what we call Best Practices Project. How could we mutually move forward? Wouldn't it make sense that the cadre of Wexner Heritage fellows alumni be an ideal audience for exploring these two domains? To me it seems yes!
5. CIJE has been doing the thinking that could develop the curriculum for such learning (in both those domains). We've even tried it out in goals seminar in Israel last summer and in upcoming

goals seminars in Milwaukee, Cleveland, etc. CIJE has the talent to be the faculty (within limitations of time) or perhaps better, to train a faculty for it.

6. I'm not sure if the best way to go is a new, separate "course" in these domains or somehow to work them into your existing curricular structure, but I am enclosing Dan Pekarsky's (who directs the Goals Project) outline of the upcoming Milwaukee seminars as a good example.

7. Part two of the curriculum would be my work in the Best Practices Project-- what do we know about success in Jewish education. The two parts would be integrated into a single "course."

8. As I said to you on the phone, I think I would not call this a seminar on Jewish education or even on the goals of Jewish education. But rather something like: "Imagining a Jewish Future: How our Communities can Change"

I hope that this is useful to you. I believe that CIJE and Wexner Heritage have an awful lot that benefit one another and developing such a program would be very important for Jewish life in North America. I have no doubts that there is a need. The issue of do we have enough "faculty" to pull it off is the question. But developing a prototype model and then a faculty who could do it is a worthy goal in itself.

Let me know your reactions.

Barry

Daniel Pekarsky

## LOCAL CIJE GOALS SEMINARS

The Goals Project is one of several initiatives developed by the Council for Initiatives in Jewish Education that are designed to catalyze, encourage, and support improvement in Jewish Education. The two guiding assumptions of the Goals Project are straight-forward:

1. As significant educational research suggests, educational effectiveness depends substantially on whether or not educating institutions are organized around goals that are clear and compelling to the key stakeholders. Without clear goals, assessment of our efforts is rendered impossible. In addition, goals ought properly to play a critical role in the making of basic decisions concerning personnel, in-service education, curriculum design, pedagogy, and the organization of the physical and social environment in which learning takes place.

2. Educating institutions (both in general and in Jewish education) suffer from a failure to be meaningfully organized around educational goals that are clear and compelling to the major partners in the enterprise - the children, the parents, and even the

educators. In the case of Jewish education, the failure is typically of various kinds simultaneously. For example, sometimes the enterprise is not guided by any clear goals; sometimes there are goals but they are only marginally or symbolically represented in day-to-day institutional life; and oftentimes the goals are not identified with even by the educators. Numerous problems flow very naturally from such weaknesses.

Growing out of these twin-assumptions, the Goals Project is an effort to encourage serious attention to goals on the part of educating institutions in the Jewish community. While addressing our weaknesses in this domain is no substitute from addressing other needs such as the personnel crisis, it is essential to any serious effort at educational improvement.

The Goals Project began with a seminar in Jerusalem for lay and professional communal and educational leaders from a number of Jewish communities around the country. In the second, and upcoming, stage of the project, CIJE, in conjunction with these leaders, will sponsor seminars in these communities for the leadership of local educating institutions. These seminars are designed with the following purposes in mind:

1. to offer the representatives of participating institutions an opportunity to develop a heightened appreciation of the important roles that goals can and should be play in education, as well as the conditions under which goals can effectively play these roles.
2. to provide participants with an opportunity to acquire questions, concepts and tools that will make possible thoughtful institutional self-studies that are sensitive to goals-related issues. Along with this there will be assignments designed to encourage this kind of self-study.
3. to provide participants with a chance to better understand the process that leads from a vision of the kind of person and community one hopes to nurture to a statement of educational goals, and thence to the development of curricular and pedagogical practices. The seminar will include opportunities to work through this process in relationship to concrete cases.
4. to surface and address the difficult issues and dilemmas that must be dealt with if the kinds of institutions many of us work in are to become more effectively organized around a Goals-agenda.

5. finally, to encourage and offer support to efforts to become more effectively organized around a goals-agenda.

In short, CIJE believes that participation in this seminar offers representatives of educating institutions a special opportunity to grow much clearer about what they are fundamentally about, to identify weaknesses, and to work towards the kind of systematic improvement that we need in Jewish education. Through their participation, lay and professional leaders of an educating institution will be helped to approach more effectively many of the difficult decisions they face. In addition, CIJE is prepared to work with one or more interested institutions that complete the seminar and satisfy other eligibility requirements on a very intensive effort at educational improvement that is organized around a goals-agenda. The nature of this stage and conditions for participation will be discussed in the seminar.

The seminar will consist of four sessions, and participants are expected to be present for all four. While the precise character of each session will depend on a number of variables, including who the participant-institutions are and what transpired at the preceding sessions, the general design of the seminar is to allow for a different theme for each session. The seminar may well look something like this:

Session 1: An examination, with careful attention to examples, of the major ways in which goals figure inadequately in Jewish educating institutions and of the ways in which this undermines their efforts at education. Juxtaposed with this will be an opportunity to look at the opposite: to examine "vision-driven institutions," that is, educating institutions which are guided by a compelling vision of what they are after, a vision which is reflected in their goals and practice.

Session 2: With the help of homework assignments completed between Sessions 1 and 2, an examination of the way goals do and don't figure in the work of the institutions represented in the seminar. Participants will also have a chance to explore their own personal visions of the aims of Jewish education and how these do and don't fit with the institution's vision and with practical realities.

Session 3: From Vision to Practice. Participants will have a chance to study and reflect on two very powerful but different visions of the aims of Jewish education, and then to consider - indeed, experiment with - what

might be involved in a serious and systematic effort to use a vision as a guide to educational practice. Findings from organizational psychology and the field of curriculum will be drawn on.

Session 4: Content will depend on preceding sessions. As projected, however, this session will involve two components: a) a look at research that bears on the difficult problem of arriving at a shared and compelling vision in an institution featuring great diversity, and b) drawing on homework assignments, an examination of efforts planned by participating institutions to forward a Goals Agenda.

- Teachers are both guardians and transmitters of tradition
- a community of teachers, as well as being a community learners (teacher-learner)

# GOALS SESSION

1

educational

I. We've been exploring leadership in a variety of ways during the past few days:

- We've looked at leadership from inside ~~the~~ and from outside -- how we can approach leadership through different frames, through reflection on our own practice [cases], through our awareness of the variety of communities that are part of the leader's environment and concern.
- We've looked at issues of leadership through ~~the~~ Jewish perspectives [Prof Green + Tworok], an area of great richness that could engage an entire seminar itself.

So we've seen matters from inside our selves, our institutions, our tradition and from outside ~~in some~~ as well. We've focused on skills, but leadership is more than skills alone.

But one crucial issue of leadership that we have not yet focused in on in detail was raised yesterday and will be our topic this morning -- the goals of Jewish education or the "vision" of education that needs to inform our work.

I'm going to share w/ you some of thinking of CISE around this theme. Tomorrow Roland Barthes is going to ~~go~~ work w/ you on his approach to the topic of vision and we hope you'll see ways that they complement one another.

Sharon's session

II.

I'm not going to offer a formal definition of the word "vision", but instead I'd like to ~~answer the~~ offer an instrumental or practical definition and simply say that an educational vision is an attempt to answer ~~the questions~~ the biggest questions of education: "Towards what kind of an individual and towards what kind of a society are we educating" or to put it in another way: what is the outcome of education that we'd like to see -- the people, the world.

III

Practical outcome:

These are very hard questions and if they are answered seriously, they can help define an educational institution. Not only that but ~~the~~ ed research seems to indicate that a powerful vision is very closely related to educational success.

But if having a vision is so good, why ~~is~~ are what CISE calls vision-driven institutions so rare? ~~why would instit~~

Is there any reason why an institution would avoid homing in and defining a clear vision?

Discuss

③

(Out of this should emerge <sup>mandel</sup> Commission as well.)  
Summarize ~~the~~ answers

#### IV Exercise:

Think of ed institutions you've known -  
- can you think of one example of an instit.  
driven by a clear sense of vision

- can you think of one example of an instit.  
not driven by a clear sense of vision

what was life like at these places - characteristics  
On Board

V Go to Dan's definition on page 2 of vision  
driven institution  
and perhaps his pp 2-4 & 3 problems

VI ~~How~~ How does ~~the~~ vision play itself out in the  
everyday life of an ~~educational~~ education instit.?  
Translation from vision to reality.

The kitchen

Eton

Social/efficiency recipes

Dewey - apple picking

~~Dewey~~

teaches all the way that goals are expressed in the actual life of the school.

Issue of Hebrew as a Jewish ed issue

→ at all ages and settings (early childhood, adult ed, day schools of camps)

Dewey had a clear vision of the nature of human beings and society and that impelled his entire educational enterprise.

For us the issue of "outcome" is related to a philosophical question  
what is a meaningful J existence and society

Where does this come from?

From within ourselves  
and without [Moderate Jew project?]  
from our Jewish content

Not just personal opinion.  
explain

exercise What impediments would you find in moving your institutions toward refining its sense of ~~the~~ vision.

## SUMMARY OF CIJE GOALS PROJECT MEETING, Oct. 21, 1994

### UPDATE

The update covered developments since the Goals Seminar in Jerusalem. It began with a brief survey of what had happened with the three communities that had been heavily represented in Jerusalem.

It was observed that while not a great deal had yet happened in Baltimore or Milwaukee, there had been a measure of progress. In the case of Baltimore, a spring kick-off for the Goals Project has been planned with some kind of a major event. The possibility of bringing Pekarsky and/or Fox for this event is something they have been discussing. In Milwaukee, there was virtually no activity, except for a single meeting that didn't seem to give rise to much, until a planning meeting at the tail-end of September to which DP was invited. There plans were made to divide up the work of engaging different possible candidates for the local Goals Seminar, and it was agreed that a series of 4 seminars would be launched in January. Pekarsky agreed to prepare some materials to help them in their effort to generate a clientele, as well as to come down once or twice between now and January to meet with representatives of institutions that may be interested in participating.

In passing, it is noteworthy that the Milwaukee-folk requested that we consider the possibility of exempting rabbinic leadership from the local seminars, fearing that an insistence that the rabbis participate might reduce overall participation on the part of local institutions. At today's CIJE meeting, we decided against their suggestion on the grounds that without strong rabbinic involvement no serious effort would be likely to succeed.

In contrast to Baltimore and Milwaukee, Cleveland has really moved ahead with the Goals Project. 1) A seminar for local educational leaders has been organized around the theme of goals, with Ackerman appointed as seminar-leader. That seminar has already met once. 2) CIJE has been approached by the Agnon School concerning the possibility of participating with it in a venture designed to make it a more vision-driven institution, and for us to learn through the partnership; 3) Rob Toren has developed documents which, when distributed, will invite local institutions to enter into a partnership with the JECC towards the development of vision-drivenness.

With respect to Cleveland, we noted the importance of getting back to Agnon ASAP concerning their interest in working with us. Though we as yet have nothing conclusive to convey to them, to be in touch with them is critical. Holtz will follow up on this. It was also noted that Ackerman has indicated that he is not entirely comfortable leading a seminar organized around a Goals-agenda, and that it might make good sense for DP to offer

to help give the seminar a measure of direction. DP will be in touch with Gurvis around this matter.

On another matter altogether, Daniel Marom's memo concerning Amy Gerstein was discussed. There continues to be great enthusiasm for meeting with her to explore her ideas, and, if warranted, possibilities for further involvement. Regrets were expressed that we hadn't moved faster on this, and it was agreed that DP should contact her ASAP to see whether we could meet with her in November, during her projected trip east.

DP reported on our meeting with the Program and Content Subcommittee, and the great interest that was expressed there in the subject of 'community-vision' or 'community goals'. He also reported concerning the possibilities discussed at a recent O'Hare airport meeting between Barry, DP, and John Colman. These matters will be folded into the discussion below and will not be summarized separately here.

#### POSSIBILITIES AND DECISIONS ON THE HORIZON

Recognizing that we need to make some basic decisions concerning priorities and directions, we proceeded to sketch out a list of possibilities from among which to choose. We pre-identified the following criteria as basic to the choice-process:

1. Outstanding commitments.
2. Do-ability, including know-how and resource-availability.
3. Fecundity, understood as the capacity of a given activity to forward CIJE's principal agenda.

Here is a list of the possibilities mentioned:

1. The planned agenda: following local seminars for local educating institutions in each of the three major communities represented at the Jerusalem conference, institutions would be identified for intensive work from among the participants. CIJE would not directly work with these institutions, but it would move the process along via two kinds of activities: a) work with individuals appointed by the institutions to carry their process further; and b) the development of a cadre of "coaches" or "resource people", to be drawn from the ranks of the most talented educators in the USA, who would be available to offer guidance to participating institutions.
2. CIJE could identify 3 to 5 different kinds of institutions that, given its agenda, it finds particularly promising. An existing community Day School; a JCC Camp; a community Day High School in the planning stages; and one or two congregations were among the possibilities considered, with promising instances of each category identified. There may, for example, be an interest

in such a venture on the part of Lee Hendler's congregation in Baltimore, Jay Roth's JCC camp in Milwaukee, and the Agnon School in Cleveland; and there was conversation about the possibility of being involved in Atlanta with a projected venture to open Hebrew High School.

3. "Community-vision" agenda. In Jerusalem as well as at our Program and Content sub-committee meeting in early October, there was great interest in the subject of "community-vision," with individuals as different as Jerry Stein, Dave Sarnat, and Maurice Corson all speaking to a pressing need for communities to make progress on this matter. This was not, as we understood, at the heart of CIJE's initial conception of the Goals Project agenda. But given the urgency felt by many concerning this matter, perhaps it needs to be given a more prominent place in our efforts.

4. Spreading the news. The Goals Seminar in Jerusalem introduced 3 well-represented communities and 2 not-so-well-represented communities to the Goals Project. Perhaps other communities should be introduced to our efforts via an America-based conference that resembles the Jerusalem Goals Seminar.

5. Use of the Goals/Vision theme to engage lay leadership in efforts to improve Jewish education.

Of these varied possibilities, all but #5, which needs to be further fleshed out, were discussed, and we emerged at the end of our deliberations with the tentative conclusions summarized below.

#### FUTURE DIRECTIONS

A. The development of capacity and prototypes. Recognizing the need meaningfully to honor outstanding commitments, we felt that we needed to pay special attention to the fecundity-criterion in making our decisions. With this in mind, and recognizing what we do and do not know and have in place at present, we felt that the next two years or so need to emphasize the development of capacity and prototypes. That is, our immediate challenge is to develop basic skills, understandings, and resources (human and other) that will facilitate the progress of this project. Concretely, this might mean the following:

1. Conceptualizing, organizing, and calendarizing a program of study for CIJE staff (and other key individuals) around Goals Project themes. The program of study would be designed to help us develop an approach or a battery of approaches in which we have a measure of confidence -- critical if we are to work with institutions and/or work effectively with "coaches" or other resource people. Among other things, this program of study would involve

opportunities for serious discussion with representatives of movements like Sizer's which are engaged in efforts from which we might learn.

2. Identification and recruitment of resource-people who could potentially work with institutions interested in taking on a Goals Project agenda. Here are the kinds of names that surfaced: Josh Elkin, Vicki Kellman, Susan Shevitz, Joe Riemer, Rob Toren (by no means an exhaustive list).

3. A seminar, scheduled for next summer, designed to bring the resource-people (identified in #2) fully on-board. Participation in the seminar would presuppose "broad strokes" identification with the Goals Project effort. Conceivably, and assuming such identification, representation from denominational training institutions might be desirable.

4. Identification of 3 to 5 prototype institutions which we are prepared to work with intensively over the next few years - with an eye towards a) their improvement, and b) our own learning, and c) writing up and disseminating what we learn. Though CIJE does not see itself as working at intra-institutional levels, it may be that for purposes of our own learning, we may want to be more intimately involved with one or more of these local efforts.

5. Developing with/for the institutions identified in #4 a set of tasks/activities that will put them in a state of "readiness" for a serious goals-agenda.

B. Outstanding commitments. As planned, Pekarsky will work with Milwaukee this year in the local seminars, and efforts will be made to be helpful to Gurvis and Ackie in the Cleveland seminar that has recently begun. In addition, we will try to be helpful to Baltimore as it moves ahead in the spring. Where any of these initiatives will actually lead we'll have to see as we move along. One thing that was very clear to us is that we must do everything we can to help out in Cleveland, which is by far the most promising of the communities to date.

#### PERSONNEL

y The Goals Project does not currently have the personnel needed to carry out its agenda in a meaningful way. Pekarsky works full-time at the University of Wisconsin and does not have substantial time available for this very demanding project. And while Dorph, Hoffmann, and Holtz may be able to take on some pieces of the project, they too are extremely busy and cannot realistically be expected to take on much more. And yet the tasks on the horizon are many, including:

1. Responsibility for coordinating, tracking, and

leading the local seminars planned for this year.

2. Identification and recruitment of resource-people from among senior educators in the U.S. who might work with our project.

3. The conceptualization and actual development of our own program of study.

4. The identification of institutions we want to work with as prototypes and to negotiate with them towards such an agreement. Along with this, the development of a process that will ready them for this work.

5. The development of a summer seminar for the resource-people we identify.

6. Day-to-day logistical and administrative matters, including communication with various institutions, communities, the Program and Content sub-committee, etc. concerning Goals Project issues.

While existing CIJE staff may be able to help out with some of these matters on a short-term basis, we recognized a critical need for additional CIJE staff to work on the Goals Project. Without such staff we will have to drastically curtail our agenda -- or else doom ourselves to very mediocre work.

Against this background, we focused some preliminary attention on the kinds of people who might prove suitable for our work. Depending on availability, we could imagine hiring either a partner to DP in this effort or someone who would be an assistant. A number of names surfaced, including Mari Blecher and Debbie Kerdiman (both of whom have worked with Lee Shulman). There was also an interest in seeing what might emerge in our conversation with Gerstein.

#### IN THE SHORT RUN:

1. DP will speak with Marom and Fox this Monday.

2. DP will draft and distribute for comment a summary of our meeting.

3. Pekarsky will communicate to Milwaukee our belief that Rabbis need to be involved and will send them "copy" to be used in their efforts to recruit folks for the Goals Project seminars.

4. Holtz will be in touch with the Agnon school.

5. Pekarsky will call Gerstein to try to arrange a time to meet.

6. We plan to emerge from our meetings with Seymour Fox in November with a clear work-plan for the year ahead.

THE 'SEYMOUR-LENS'

1. What would optimal Goals Project success look like after, say, 3 years?

2. In the developing plan how might we take optimal advantage of CIJE resources?

a. How might the Monitoring, Evaluation, and Feedback Project contribute to the development of the Goals Project?

b. How might the Educated Jew Project contribute to the development of the Goals Project?

THE FIVE-LEVELS SCREEN

Philosophy

Philosophy of Education

Translation into Curriculum

Implementation

Evaluation

## CIJE'S GOALS PROJECT

### WHAT IS THE GOALS PROJECT?

The Goals Project of the Council on Initiatives in Jewish Education grows out of the conviction that effectiveness in Jewish, as in general, education depends substantially on whether educating institutions are vision-driven. To describe a Jewish educating institution as vision-driven is to say that it is animated by a vision or conception of the kind of Jewish human being and the kind of Jewish community it is trying to bring into being. Guided by the belief that Jewish educating institutions need to become significantly more vision-driven than they typically are, the Goals Project is an effort to encourage vision-drivenness in Jewish education. It will do so in two ways: first, through efforts to foster an appreciation among relevant constituencies of the importance of being vision-driven; and second, through strategies designed to encourage educating institutions to develop their underlying visions and to identify and actualize the educational implications of these visions.

### RATIONALE

To make good educational sense, an institution's decisions concerning what educational goals to pursue, as well as how to interpret and prioritize them, need to be anchored in, and justified by, a coherent vision of what it is trying to achieve. That is, its efforts need to be guided by compelling answers to the following questions: what kind of a Jewish person, featuring what constellation of beliefs, knowledge, attitudes, skills, commitments, and dispositions, should we be cultivating? And what form of Jewish community, defined by what purposes, ethos, patterns of activity, customs, norms, and forms of human relationship, are we trying to encourage? An adequate guiding vision does not offer a laundry-list of miscellaneous characteristics to be cultivated in students but exhibits how they fit together to compose a picture of a meaningful form of Jewish existence. Absent such a vision, not only are basic decisions concerning educational goals hard to reasonably make, so too are decisions concerning other important matters, including the organization of the physical and social environment, appropriate forms of pedagogy, and the skills desirable in educators. In addition, the absence of a vision of the kind of human beings and community it is hoping to cultivate deprives an educational institution of an important basis for evaluating the success of its efforts.

The importance of vision-drivenness can be defended on theoretical grounds, but not only on such grounds. There is also a body of research from general education that identifies the presence of a substantive guiding vision as indispensable to an educating institution's success.

The contention that vision is indispensable is, of course, not

intended to suggest the desirability of any particular vision. It is intended to suggest that it is important for each educating institution to identify or refine the vision appropriate to it and to look for ways to embody, or to better embody, this vision in its everyday workings. It is this effort that the Goals Project hopes to encourage.

The development of a substantive vision that is compelling to the relevant stakeholders and whose educational implications have been worked out in a meaningful way is a labor-intensive, intellectually and Jewishly demanding activity. It requires careful thinking, educational expertise of varied kinds, ingenuity, soul-searching, and study. And because it is likely that participants in this process will bring with them diverse and sometimes conflicting convictions, some serious deliberation and negotiation will need to go on among them. Not only is the work hard, it must be acknowledged that there are no guarantees of success. But it must also be stressed that the potential rewards for the participants in the process, both as individuals and as representatives of their institutions, can be very significant.

#### THE GOALS PROJECT'S RESOURCES AND AGENDA

In its efforts to encourage Jewish educating institutions to become vision-driven, CIJE benefits from the resources and the ongoing support of the Mandel Institute for the Advanced Study and Development of Jewish Education. Of special value to the Goals Project is the Mandel Institute's Educated Jew Project, which explores a number of significant conceptions of an educated Jew and then examines the implications of these conceptions for the goals and organization of Jewish education. The Educated Jew Project has developed through significant contributions by some extraordinary Jewish thinkers and educational theorists, including Professors Israel Scheffler and Isadore Twersky of Harvard University, Professors Menachem Brinker, Moshe Greenberg and Michael Rosenak of the Hebrew University, and Professor Seymour Fox, Rabbi Shmuel Wygoda, and Daniel Marom of the Mandel Institute. The contributions of such individuals to CIJE'S Goals Project has been and will continue to be invaluable.

In collaboration with the staff of the Mandel Institute and the Educated Jew Project, the Goals Project is launching a number of initiatives designed to encourage vision-drivenness in Jewish educating institutions. The principal initiatives are summarized below.

A library of educational resources. The Goals Project has begun a process of gathering materials, both theoretical and practical, that speak to the importance of vision and its relationship to educational goals and practice, as well as to the process of becoming vision-driven. This library of materials will be made available to communities and educating institutions that are interested in fostering vision-drivenness.

A Summer Seminar in Jerusalem. The Summer Seminar will bring to Israel lay and professional leaders in Jewish education, primarily but not exclusively from Lead Communities, for an intensive period of study and planning. The seminar is designed to foster in participants an appreciation for the critical role that vision plays in Jewish education and to offer them an opportunity to grapple with critical issues that must be addressed if Jewish educating institutions, in general and in their local communities, are to become more vision-driven than they typically are. The seminar is designed with the expectation that on their return from the seminar, participants will collaborate with CIJE in its efforts to encourage work in this arena in their home-communities.

Local seminars in Lead Communities (and beyond). CIJE will sponsor a series of seminars in each Lead Community next year for the representatives of local educating institutions. To participate an institution will need to agree to come to all of the sessions and to have in attendance the key stakeholders from its professional and educational leadership. The seminars are designed to encourage local educating institutions to begin the process of becoming, or becoming more, vision-driven. It is the responsibility of the community's lay and professional leadership to develop the clientele for these seminars.

#### CONCLUDING COMMENTS

CIJE does not believe that becoming vision-driven is easy or that it is sufficient to remedy the ills of Jewish educating institutions. But it is convinced that it is indispensable to success, and it welcomes your participation in the effort to encourage more careful attention to vision and goals among educating institutions in Lead Communities and elsewhere.

### C.I.J.E.'S SUMMER SEMINAR ON GOALS

The Goals Project of the Council on Initiatives in Jewish Education grows out of the conviction that effectiveness in Jewish education depends substantially on the ability of Jewish educating institutions to become significantly more vision-driven than they typically are. To describe a Jewish educating institution as vision-driven is to say that it is animated by a vision or conception of the kind of Jewish human being and the kind of Jewish community it is trying to bring into being. A vision-driven institution is one that is clear about its answers to the following questions: "What kind of a Jewish person, featuring what constellation of beliefs, attitudes, knowledge, commitments and skills, are we trying to cultivate? What form of Jewish community, characterized by what sense of purpose, ethos, patterns of activity, norms, customs, and forms of relationship are we trying to encourage?" Equally important, a vision-driven educating institution is one that has found meaningful ways of embodying its answers to these questions in its daily workings.

In its efforts to encourage Jewish educating institutions to become vision-driven, C.I.J.E. benefits from the resources and the ongoing support of the Mandel Institute for the Advanced Study and Development of Jewish Education. Of special value to the Goals Project is the Mandel Institute's Educated Jew Project, which explores a number of significant conceptions of an educated Jew and then examines the implications of these conceptions for the goals and organization of Jewish education. The Educated Jew Project has developed through significant contributions by some extraordinary Jewish thinkers and educational theorists, including Professors Israel Scheffler and Isadore Twersky of Harvard University, Professors Menachem Brinker, Moshe Greenberg and Michael Rosenak of the Hebrew University, and Professor Seymour Fox, Rabbi Shmuel Wygoda, and Daniel Marom of the Mandel Institute. The contributions of such individuals to C.I.J.E.'s Goals Project has been and will continue to be invaluable.

The Summer Seminar on Goals is one of several activities developed by C.I.J.E. in order to foster a climate and initiatives that will encourage Jewish educating institutions to become vision-driven. Planned in collaboration with the staff of the Mandel Institute and the Goals Project, the seminar brings to Israel lay and professional leaders in Jewish education, primarily but not exclusively from Lead Communities, for a period of intensive study and planning. The seminar is designed to foster an appreciation for the important role that vision should, but too often does not, play in Jewish education and to provide an opportunity to think through critical issues that must be addressed if Jewish educating institutions are to become more vision-driven. Topics include: what visions are and how they give coherence and direction to the educational process; the challenge, at the local level, of arriving at a vision that is shared, compelling, and concrete enough to guide practice; the process of devising educational arrangements

that are informed by a designated vision; strategies for engaging local educating institutions in the effort to become vision-driven. The seminar is designed with the expectation that on their return to their local communities, participants will collaborate with C.I.J.E. in its efforts to encourage local initiatives in this important area.

## IN-HOUSE INTERPRETATION OF CRITICAL THEMES AND CONCEPTS

This is an in-process, unpolished document that attempts to articulate concepts, themes, strategies, questions, and so forth that have emerged in our work on the Goals Project. Nothing that is found here necessarily represents any official CIJE position, and the document is, of course, revisable in a number of ways; it will no doubt be expanded, and it is likely that some things herein expressed will undergo change. This said, the document may be useful for us to review so that we feel confident that we are using the same language.

### CONTENTS

- 1 - 3           Goals: their importance, and their problematic place in the world of Jewish education
- 3 - 7           The concept of "Vision", why vision is important, and characteristics of Vision-Driven Institutions. For a discussion of different senses of "vision", see Appendix 1, pp. 14-17.
- 7 - 10          On moving towards coherent, shared, and compelling visions. Here some of the critical questions and insights that have entered into our thinking are raised; followed by a discussion (somewhat removed, perhaps, from what's feasible in most communities) of structural reforms that might make for more vision-drivenness.
- 10 -12         From vision to educational design: the problem and dimensions of translation.
- 13               Some questions that we need to be giving thought to (and that may be raised by participants)
- 14 - 17         APPENDIX 1: The Concept of Vision: here existential, institutional, and community-wide visions are distinguished, and some attempt is made to begin in a very rough way developing the concept of a Community-wide vision
- 18 - 19         APPENDIX 2: Is there a CIJE approach to engendering vision-drivenness? Some of the principles that seem to be emerging are articulated here.
- 20-32          APPENDIX 3: Organizational perspectives on the problem of nurturing a vision-drivenness. Because of my own relative ignorance in this area and my conviction that these perspectives may prove invaluable, I have done some reading in this area and am summarizing (for my benefit as well as for anybody else) the insights that I have

found worth thinking about, which is not to say that they are necessarily "right". Indeed, there are probably some serious difference of opinion between, say, Schein and Senge.

[Note that the fact that the document does not discuss issues of moving from vision to curriculum design is not intended to minimize the importance of this domain; but my assumption that there are among us people who know quite a lot about this area.]

AN IN-HOUSE INTERPRETATION OF CRITICAL CONCEPTS AND THEMES THAT DEFINE THE GOALS PROJECT

GOALS AND EDUCATION

1. No sense of direction, no adequate deliberation. Absent a clear understanding of what one hopes to accomplish via one's educational efforts, it is impossible to make intelligent decisions concerning the design of social environment, the determination and interpretation of content, and the appropriateness of different kinds of curricular choices and pedagogical decisions.

2. What are goals. "What one hopes to accomplish" could plausibly be understood as "one's goals." By "goals" we understand general statements of purpose that identify specific kinds of skills, attitudes, understandings, beliefs, commitments, values, dispositions (and so forth) that are to be imparted, encouraged, or cultivated through the process of education. An educational philosophy is likely to include a number of distinct, though inter-related goals, each of which is tied to the other in a meaningful way.

3. Critical role of goals. Goals play a critical role in the educational process: a) as intimated above, they are an indispensable guide to the design of educational environments and practices, to the determination of curriculum content and objectives, and to the selection and training of personnel; b) goals offer a lens, or organizing principle, for scanning the interests, capacities, understandings, and skills of the students; c) without clear goals, serious evaluation of one's efforts to educate are impossible, and this makes systematic effort as improvement hard to achieve; d) a corollary of c) is that in the absence of clear goals, accountability is not possible.

GOALS IN JEWISH EDUCATION: SOME ROUGH GENERALIZATIONS

Like many - indeed, most - general educating institutions, most Jewish educating institutions fail the test of being, in any serious sense, goals-oriented. In many instances, institutions have not developed a mission-statement that articulates their goals; and even when such a mission-statement does exist that purports to articulate the institution's educational goals, these goals fail to be adequately related to the world of practice. This failure reflects one or more of a number of problems, some of which are articulated below.

1. Vague and decontextualized. They are often so vague as to offer no real guidance to practice. To be helpful, goals have to be clear and concrete enough to offer a sense of direction and to communicate what it would mean to succeed or fail in a meaningful

way. The phrase "in a meaningful way" is meant to underscore the importance of thinking about goals in a broad and generous sense. Specifically, the goal of, say, "Hebrew proficiency" must include not just abstract abilities; it must also consider the contexts in which this ability is to be exhibited and the attitudes that should accompany the development of this proficiency. Dewey's comments concerning "collateral learnings" in EXPERIENCE AND EDUCATION are germane here -- particularly his concern that students may acquire a given skill in ways that lead them to hate the context in which they learned it and to be despising of the skill itself.

2 Achievement of goals not central to articulation of the educator's task. Many educators are not in any serious way encouraged to approach their teaching assignments with clear goals in mind. They may be told to teach a particular body of subject-matter, e.g. Hebrew, Bible, Israel, Jewish Holidays, but without any specification of what goals are to be achieved via this subject-matter. The result is that how educators approach the subject-matter is often very idiosyncratic and thoughtless. The guiding principle is often "what will keep them interested," rather than "How will the learning experiences I am designing fit into a comprehensive sequence of learning experiences that will move the students towards achievement of particular goals that we think important.

3. Problems of non-identification with goals and/or despair of achieving them. Even when educators are familiar with the institution's goals, and even if the curriculum comes with specific goals (itself a significant achievement!), implementation of the goals is hampered by a variety of typical circumstances: i. the educator does not in any personal way identify with the goal or embody it in his/her life; ii. the educator despairs of the very possibility of realizing the goal, given the cultural and familial environment from which the students come and to which they return and the available time.

4. Symbolic rather than systematic efforts to achieve avowed goals. There is no systematic effort to design the environment and the curriculum so as to accomplish goals that have been identified. By "systematic effort" is meant a thoughtful, careful assessment, informed by honest good judgement and whatever empirical data are at hand, of whether the practices in place or proposed have a reasonable chance of achieving the desired outcomes (in the face of constraining conditions). On the contrary, oftentimes the relationship between avowed goals and educational practice is primarily "symbolic"; that is, the institution feels comfortable if it can show that there is some educational practice which corresponds to the goal in question, but does not ask what constellation of efforts would be required if the goal is to be meaningfully achieved. corollary of this is that there is no serious and honest effort to evaluate the success of our efforts.

5. Too many goals. One of the reasons why any particular goal identified in a mission-statement is not meaningfully achieved is that oftentimes there are too many goals, a circumstances that diffuses any sense of purpose or direction. Institutions would often be better off committing themselves to the attainment of a few clearly articulated goals (or else deciding what is essential and what peripheral), rather than trying to cover the water front.

## VISION

Many of the weaknesses identified in the preceding section (points 1 through 5) speak to problems in the relationship between goals and practice. But some of these weaknesses also reflect a more fundamental difficulty, and that is that the goals identified by an educating institution are often not anchored in a coherent, organic vision of the kind of Jewish human being and the kind of Jewish community it is hoping to cultivate through its educating efforts. (While "vision" in this sense is the subject of the comments that follow, it needs to be distinguished from "vision" in other senses. See Appendix 1. for a discussion of these distinctions.)

1. A vision of the kind of person one is trying to cultivate does the following:

a) Elements: it identifies the attitudes, understandings, skills, dispositions, beliefs, commitments, knowledge, and so forth that are important;

b) Integration of elements: it explains how these various ingredients hang together and support one another in pattern of life; inevitably this integration identifies the nature of the ideal community of which the individual is a part. That is, there is a social dimension to the envisioned state-of-affairs.

c) Meaningfulness criterion: it makes evident why the kind of life that is represented in b) is "meaningful" in a twofold sense: i) it is a "worthy" way of living Jewishly; and ii) it is experienced as personally meaningful "from the inside", that is, by individuals who in their own life embody this vision.

2. A vision interprets traditional Jewish categories. A vision of a meaningful Jewish existence takes a position on the significance of key concepts like "God", "Torah", "the Jewish People," "Mitzvot," and "the Land of Israel." In the vision these concepts are interpreted, assigned a value, and understood in their inter-relationship.

3. The distinction between fixed visions and process-visions. Typically, we think of a vision as specifying an outlook and way of life, organized around certain fundamental beliefs, concerns, and values. It is, so to speak, a picture of what life at its best is like, a snapshot of a way of life viewed as ideal. But it is also possible for a vision to have a more open-ended, dynamic quality. What might be called a "process-vision" is one that specifies attitudes, skills, and abilities that engage the individual in an ongoing process of constructing and reconstructing his or her relationship to Jewish culture and tradition. A process-vision is not necessarily, as its critics might contend, agnostic about what is important Jewishly. A process-vision might well specify the importance of studying Jewish texts (narrowly or broadly understood) or experimenting with Jewish celebration in one's efforts to develop as a Jew; it might also stress the importance of understanding diverse views that Jews of different kinds and periods have taken on critical issues and the different ways they have lived. Chances are, any process-vision one will encounter will implicitly or explicitly endorse certain bottom-line moral and intellectual virtues. Still, the emphasis (within this framework) is on growth, development and change in one's understanding of an ideal Jewish life -- and the ideal Jewish life is one that allows for and encourages such growth. In general education, Dewey represents a kind of process-vision; in the Educated Jew Project, it is arguable that Menachem Brinker represents such a position.

Two kinds of process-visions. Note, before leaving this topic, that process-visions are of two kinds: there are process-visions which are thought of as culminating in a particular form of Jewish existence (which arises out of the designated process). There are also process-visions which are not thought of as culminating in any particular product; that is, the process is understood to be never-ending, and the ideal is to be the kind of person who is, in the right spirit, engaged in the process. Dewey's ideal of growth is a good example of this kind of a process-vision.

4. The social dimension. The preceding account of vision, understood as the ideal outcome of a Jewish education, is inadequate in that it fails to capture the social dimension of Jewish existence. Any form of Jewish existence to be aspired to will require a community organized in a particular way, without which the form of existence sought after will prove impossible. Some, indeed, would formulate the aim of Jewish education primarily in social terms -- that is, its task is to help maintain or create a community of a certain kind, a community which serves an important ethical, spiritual, or even metaphysical purpose. Perhaps the best way to think about "vision", understood as the ideal outcome of a Jewish education, is as encompassing both social and individual dimensions: to be guided by a vision is to be guided by a conception of human life in which the forms of social life enrich and are enriched by the lives of the individual human beings who make up the community. This kind of integration of individual and

community - in the vision itself- is explicit in Dewey's position.

5. Why vision is important -- Vision is the anchor for goals. To say that vision is the anchor is to convey a number of important but inter-related points:

a. Goals are not self-justifying; rather, they are justified by showing how they are anchored in a vision of Jewish existence that the critical stakeholders genuinely regard as meaningful. Absent this showing goals exist in a vacuum; they may well seem arbitrary and meaningless.

b. Vision also anchors goals in that it interprets and thus makes more concrete what the goals really signify. "Hebrew proficiency" a la Greenberg, Ahad Ha-Am, Menachem Brinker is not one thing but many: why Hebrew is important, the settings in which it is to be used, the attitudes that surround its use, and so forth are very different. The kind of clarity provided by vision gives direction to the educational enterprise of a kind impossible in the absence of vision.

c. Vision anchors goals in the sense that it explains not only the meaning and relative importance of goals, but also how the elements identified in different goals hang together to constitute a meaningful way of life.

6. What is a vision-driven institution? For reasons stated above, the Goals Project assumes that efforts at Jewish education will be substantially improved if educating institutions become significantly more vision-driven than they now are. A vision-driven institution is one that, down to its very details, Specifically, a vision-driven educating institution features the following formal elements:

a. The existence of a vision in the sense specified above. To say that the vision "exists" is to suggest that the critical stakeholders identify strongly with this vision, that they regard it as worthy and compelling.

b. The goals that guide educational practice can be explained with reference to the guiding vision.

c. The curriculum, as well as the physical and social environment, exhibit commitment to the guiding vision and the particular goals that are derived from it.

d. The educators who do the work of the institution strongly identify with and themselves exemplify the vision that the institution represents and thus approach efforts to actualize the vision whole-heartedly.

e. Because the institution cares deeply whether it is successful in realizing its goals and vision, it looks for gaps between intention and outcome and works hard to remedy them, There is here a tacit commitment to serious assessment and self-improvement -- this being a sign of a really serious commitment to the underlying goals and vision.

7. "Vision-driven" does not necessarily imply "planful" or "designed". Not all vision-driven institution emerge through systematic efforts to translate a shared vision into a blueprint for an educational institution, which is then translated into practice under real world conditions. In some vision-driven institutions, nobody has thought systematically about what the guiding vision is or about the way to translate that vision into educational terms.

a. Invisible hand institutions. Some such institutions have evolved more organically, spontaneously, and unself-consciously through a variety of cooperating circumstances over a period of time. [Such institutions come into being and exist in a way that is described by many "Conservative" social and educational theorists like Edmund Burke, Michael Oakshott, and Michael Polanyi. These thinkers are often skeptical, if not actually critical, of efforts to systematically articulate and then implant a vision.]

b. Sometimes institutional visions precede the vision of ideal educational outcomes. Sometimes an institution grows out of someone's vision of what an ideal educational institution looks like (and not out of a vision of the product of the educational process). In such cases as well, while there may be an animating vision of the kind of person and community one is hoping to nurture, it will not necessarily be articulated or readily articulable by the participants.

8. "Visions" and "Visions-in-Use". While the participants in an institution may not be capable of identifying a guiding vision that is at work in the institution, an anthropologically-oriented observer may be capable of doing precisely that. That is, the observer may be able to tie the predictable outcomes of participation in the institution to the body of practices, customs, organizational structure, and norms exhibited in the institution. The delicate balance of institutional life seems to operate, as though and perhaps in fact invisibly, to maintain this state-of-affairs: the outcomes remain the same over long periods of time, and institutional arrangements, down to the very details, tend to support them. Efforts to change these patterns change. In such a case, we might want to speak of a vision-in-use. "Vision-in-use"

is a conception of the outcome of the educational process which, were it actively subscribed to, would go a long way towards explaining the patterns of activity and organization and other features of the institution's living reality.

It is possible that when a vision-in-use is articulated, the participants will say, "Yes -- that is exactly what we're after -- except that now you've given voice to it." It is, however, also possible that the vision-in-use articulated by the observer will be disavowed by participants in the institution: "This is not at all what we're after," they might say. a) It is possible that this denial is an act of Sartreian "bad faith;" that is, they don't want to own up to the vision that they are in fact committed to. b) Another possibility is that they have simply failed up to now to understand the impact of the educational arrangements they have created and that they are truly disturbed by what they have discovered.

Suppose now that, disturbed by what they have learned, they set about trying to improve things but that these changes come to nought. It is an open question which of the two possibilities discussed above this state-of-affairs would support. Concrete study into the particulars of the case would probably be necessary to make a determination as between these - or perhaps other - possibilities.

#### TOWARDS COHERENT, SHARED, AND COMPELLING VISIONS

Jewish educating institutions typically serve an extraordinarily diverse clientele. Many of those who are tied to an institution have not ever engaged in trying to clarify their own visions of a meaningful Jewish existence, and to the extent that they have, what they discover is that there is great diversity of views amongst them. If vision-driven institutions are to become more prominent features of our educational landscape, the problem of how to generate shared vision must be addressed. Appendix 2 articulates some of CIJE's emerging guiding principles in this domain. Appendix 3 reports some pertinent insights that come from the field of organizational development. Here we limit ourselves to a skeletal account of some pertinent issues, beginning with two very general approaches to the problem.

The first approach focuses on strategies designed to encourage a group of diverse individuals in the direction of a shared vision; the second approach points to the possibility of structural changes that might substantially lessen the need to dissolve diversity. These are elaborated below.

##### A. Towards Shared Vision where none has existed before.

Most generally, assume for the moment an institution featuring

at least the impression of significant diversity of outlook among the critical stakeholders. Through what kind of process can a group of individuals be brought together under the umbrella of a vision that will be both shared and compelling? A multitude of overlapping questions cluster around this general issue. For example:

1. Assuming that there is more than one process that lead to this achievement, are there reasons to encourage one or some among them and not others?

2. What is the role of professional, lay, and denominational leadership in this process?

3.. To what extent, if at all, should some variant of the "democratic process" guide or define the outcome?

4. Is it the leadership's job:

a. to guide the rank-and-file towards an appreciation of a vision they judge appropriate?,

b. to help draw out from their constituencies a vision that reflects "where they are and want to be", that is, to work towards the development of a vision that integrates the visions of the key stakeholders?

c. to encourage a process that guides the membership towards disciplined, content-based reflection concerning what they want to be educating towards?

5. In what way does serious study enter into the process of working towards a shared vision? Must it be insisted on?

6. To what extent and in what ways should some variant of the democratic process enter into the process of developing a shared vision?

7. Who are the key stakeholders that must buy into a vision - and at what stages - if an institution is to have a meaningful chance of becoming more vision-driven?

8. Is it possible that the attempt to define an institutional vision -- of the kind of institution we'd like to see - should sometimes precede the attempt to define a guiding vision of the kind of person and community we want to cultivate?

9. To what extent will appropriate answers to these various questions depend on a variety of local circumstances, e.g., the nature of the leadership, the attitudes of the constituency, the history and culture of the institution, the desire of denomination leaders to be involved, etc.?

10. Through what process can members of an institution be brought to appreciate the importance of working towards vision-drivenness and to agree to make the effort?

11. Through what set of activities/processes should the stakeholders of an educating institution take stock of the institution's present state-of-affairs -- its structures, its impact, its vision-in-use, etc., and how can participation in such activities and processes encourage the effort to move towards vision-drivenness?

#### B. STRUCTURAL REFORM AS A SOLUTION TO THE PROBLEM OF GENERATING SHARED VISION

The immediately preceding section pointed to different strategies by which an institution lacking a coherent and compelling guiding vision might move - or be moved - towards one. Briefly and crudely summarized, the three strategies suggested involved: a) through a carefully devised process, a vision predesignated by the leadership comes to be shared by the critical stakeholders; b) an effort is made to elicit from the key stakeholders what their own visions are and then to develop a vision which integrates their respective visions into a coherent whole; and c) a process that involves the interplay between efforts to clarify one's own vision and efforts to understand and struggle with the articulated visions of thoughtful individuals who have wrestled with this problem in a penetrating way over a long period of time, e.g. Greenberg, Brinker, Twersky. The actual process may lean in one direction or another but may involve elements of all three strategies.

Here I'd like to suggest an altogether different approach to this problem - an approach that works from the assumption that it may be very difficult if not impossible to move people holding diverse views towards a shared and compelling vision of what they would hope to accomplish. The intuitive idea at the heart of the two proposals summarized below is that it may be easier to create structures that will encourage individuals who share a common vision to self-select into a congenial educational environment than it is to develop a shared vision among people who may begin light-years away from each other.

#### PROPOSAL 1: THE MAGNET SCHOOL MODEL

This proposal is modelled on magnet-school programs and choice-plans found in general education. In community X, a decision is made to dissolve the existing educational system which assigns children to educating institutions based on congregational affiliation. Instead, the community self-consciously establish a number of educating institutions, each informed by a different guiding vision. One institution might heavily emphasize text study as the heart of Jewish existence; another might emphasize social action, yet a third might make spirituality its core theme, etc. Parents, who have heretofore been expected to send their children to their congregation's educational institution, would be told that by virtue of their membership in the congregation they are eligible to attend any one of the educating institutions in the system. Their job is to pick an institution whose guiding vision they identify with. Through a process of self-selection different institutions tend to attract a population of individuals who share values, outlook, and aspirations. Under this system, parents wishing to enroll their child in a particular vision-driven institution would need to apply, and they might well be asked to agree to various ground-rules and expectations as a condition of admission. In such a system, we would not have to create shared visions; rather, individuals already sharing a vision would, through the operation of the system, be brought together under one roof.

#### PROPOSAL 2: THE SCHOOL WITHIN A SCHOOL MODEL

A congregation announces that within its existing educational system - say, a congregational school -- it is about to open a smaller and very selective "school within a school." All members of the congregation are eligible to enroll their children in the school-within-the-school, with the qualification that they must understand the vision animating the experimental institution and agree to its ground-rules and expectations.

Like Proposal 1, the arrangements identified in Proposal 2 operate to draw in a select group of families who understand and identify with the guiding vision of the educating institution -- in this case "the school within the school". The advantage of this strategy enjoys, as compared with the first, is that it does not require elaborate structural changes on the order of dissolving the institution of the congregational school.

#### FROM VISION TO EDUCATIONAL DESIGN

1. Having a vision does not guarantee the ability to create a vision-driven institution. Having a vision of a meaningful Jewish existence, even one that is shared and compelling, is no guarantee that one will be develop educational institutions that ably express

and guide students in the direction of this vision. Indeed, although it sometimes happens that a single individual is adept both at articulating a powerful vision and at developing educational arrangements that nurture that vision into being, there is no reason to think that typically these very different skills go hand in hand.

2. No unique translation. There is no unique translation of a vision into educational terms. It is not just that the elements of the vision will inevitably be somewhat differently interpreted, but that the translation into goals and educational practices necessarily relies on a variety of beliefs concerning human nature and education, e.g., the way, and the conditions under which, human beings learn and grow. Different beliefs concerning such matters will give rise to very different educational arrangements, even if one begins with the same vision of the ideal to be striven for.

3. Dimensions of the translation. To translate a vision into practice involves attention not only to curriculum and pedagogy but also to the organization of the social and physical environment -- to what some describe as "the culture" of the institution.

3. The how question. Through what kinds of processes and expertise can a vision, once agreed on, be meaningfully translated into goals, and from goals into the design of curriculum, institutional norms, patterns of physical organization, etc.? Where is the appropriate expertise to be found? Educators are sometimes to emphasize the problem of developing curricula that are appropriate to a particular vision; see Appendix 2 for a discussion of the equally important problem of creating an institutional culture that embodies the vision.

4. Variations in one's conception of the process of translation. While, as noted above, one's translation may vary depending on one's interpretation of the vision and one's assumptions about human nature, human growth, and human learning, translations may also vary because people understand the process of translation itself in very different terms. For example:

a. one school of thought may insist that one begin with vision, then move in linear fashion to goals, and then to objectives, and then to concrete learning experiences spread over X number of years. Regardless of the wisdom of that approach, it is worth noting that there are others.

b. Dewey's approach would probably be to use the guiding vision as an observational and planning tool. Meeting up with a new group of children, the educator interprets their impulses, behaviors, understandings and skills through the lens of the vision. Keeping the vision clearly in mind, the educator struggles, in true

progressive fashion, to guide the young into activities that they will find exciting but that will help to develop understandings, desires, and dispositions that will incline the individual towards the world that the vision represents.

c. Some approach the translation problem with a guiding-principle like the following: "The whole must be embodied in the parts; that is, the vision must be present in a meaningful and visible way down to the details of institutional life."

As may be apparent, such approaches are not necessarily mutually exclusive. Both at the level of theory and pragmatically, integrations of different kinds may be possible.

5. Towards total vision. A useful tool in the effort to transform an institution towards vision-drivenness is to do an exercise Mort Mandel recommended in the context of CIJE's effort to chart its own course. The exercise asks participants to do a version of "the future as history": assuming that things proceed as you would hope:

a. what would your institution look like ten years hence?

b. Describe the process that got it there, with attention to relevant obstacles, etc.

QUESTIONS FOR THE GOALS PROJECT THAT CHALLENGE ITS CONCEPTUAL FRAMEWORK AND ASSUMPTIONS

1. "Our pressing need today is not for conceptions or visions of the ideal product of a Jewish education. Rather, our principal need is to provide children and adults in our communities with experiences that bring home to them the life-transforming power of Jewish customs, understandings, and activities, so that they will develop a thirst for more and deeper such experiences. What we need is to catalyze a drive to seriously explore the resources of Judaism -- not a vision of the end of that exploration. Our energies should therefore focus on activities like Shabbatonim, Israel experiences, and text-study encounters that will awaken in adults and children alike a thirst for Jewish growth."

2. Do we really need an underlying "vision" in which our educational goals are anchored? Might it not be possible and enough for an educating institution to develop a clear and coherent set of guiding goals which are not wedded to any particular conception of "the Good Life" (Jewishly speaking)? Moreover, given the diversity of outlook among stakeholders within even most individual institutions, isn't it more realistic to think that we could generate widespread support for a set of general goals than for an over-arching vision of the kind of person we want to nurture? Perhaps we should be encouraging institutions to identify and commit themselves seriously to a small number of core-goals and give up the effort to develop an anchoring vision.

3. "Our problem is not 'vision', but something else. Many educating institutions do have visions (i.e. conceptions of where they want to head, of the kind of person they want to cultivate). Their problem is not an absence of vision but that the conditions of life make it impossible to realize this vision (for example, the culture that surround the children day-in-day-out, the time available for Jewish education, the attitudes of their parents, the unavailability of educators who have any commitment to the institution's vision). These problems - not "the vision-thing" -- are what we need to address.

## APPENDIX 1: THE CONCEPT OF VISION

Because the term "vision" is central to the Goals Project, it is crucial that it be clear. Since the term is used in a variety of ways, some of which may be inter-related, some critical distinctions need to be made. In the main body of the text, the emphasis is on "vision", understood as the kind of human being/community towards which we should be educating. Reserving the term existential vision for vision in this sense, I want to point to two very different kinds of vision, which I will label, respectively, institutional vision and community-wide vision.

### INSTITUTIONAL VISION

An institutional vision is a conception, image, or portrait, of the kind of institution one aspires to. What would our educating institution at its best look like? Towards what kind of an institution do we aspire? Such a vision can be thin or rich in details and dimensions. It might include reference to architecture, social organization, ethos, kinds of programs and learning that go on, kinds of personnel, routines and rhythms for students, staff, and parents, etc.

Having an institutional vision can be an invaluable guide to educational planning, both long- and short-term. It provides a basis for determining specific goals and objectives, for program selection, for resource allocation, etc.

From the standpoint of the Goals Project, the important point is that there is a close connection between existential visions (what we should be educating towards) and institutional visions. At their best, institutional visions are tailored to the requirements of a particular existential vision -- so much so, that the existential vision may be inferred through an examination of the institutional vision. There are, of course, times, when the existential vision is implicitly rather than explicitly present in the institutional vision.

Viewed in this light, vision-driven institution at its best is one that has actualized an institutional vision that is informed and guided by an existential vision to which the stakeholders are committed.

### TOWARDS VISION-DRIVEN COMMUNITIES: COMMUNITY-WIDE VISION

CIJE'S Goals Project is primarily focussed on the development of vision-driven institutions, not on vision-driven communities. Still, there is much that can be said about "vision-driven communities" that is pertinent to the work of the Goals Project. Some thoughts concerning this matter are sketched out below,

beginning with the observation that the kinds of communities that have become engaged in the CIJE process are all communities that have announced their commitment to the cause of Jewish continuity. But what does it mean for a community to say that it cares about Jewish continuity? What is it committing itself to if it seriously announces this as its central concern? Reflection on this question offers a sterling-opportunity to work towards a community-wide vision.

Communities might choose to answer this general question in many ways. A community might, for example, interpret its "caring about Jewish continuity" as entailing the following:

1. We are a caring community. We are a community that in varied ways communicates to its members that they are cared about and that their basic needs will be met. To say that we are a caring community is also to say that we offer our members meaningful opportunities to be the givers of care to others (not just the receivers).
2. We are a community that offers its members opportunities for activities they will find personally meaningful. What these activities are -- whether in the realm of celebration or prayer, social action, study, meeting the needs of others - needs to be determined; but the key is for the community to offer its members opportunities for engagement that they might not otherwise have.
3. We are a community that takes education seriously.

Just as it is not self-evident what it means to be a caring community or a community that provides its members with avenues for meaningful engagement, so too, it is not self-evident what it means to be a community that takes education seriously. But here is one thing it does not mean: it doesn't mean that the community announces works towards a vision of an ideal Jew and then proceeds to try to actualize it. Such matters, which are at the heart of the Goals Project, are more appropriately addressed at local, institutional levels.

But to say that a community shouldn't be in the business of articulating and trying to actualize its own vision of an ideal Jew doesn't mean that it is stuck with articulating "motherhood and apple pie" kinds of goals. On the contrary, a community that announces itself to be serious about education can articulate a coherent vision of itself with some real bite. Here are some possible elements:

1. We are a community that works hard to encourage its constituent institutions to develop an adequate personnel

base. We are committed to their being an able educational director working full-time in each sizeable institution and we will do what we can to raise the educational level of the educators.

2. We are a community in which everybody - including lay and professional community leaders - is engaged in serious learning, and will work hard to make this image of ourselves a reality.

3. We are a community that develops meaningful educational opportunities for those (say, inter-marrieds) who may be currently excluded from our purview.

4. While we as a community do not have a vision of a meaningful Jewish existence which we represent, we believe it important to do what we can to encourage our constituent, local institutions to become vision-driven, and we commit ourselves to using our energies and resources to making this happen.

The foregoing represents one way to approach the challenge of developing "a vision-driven community", that is, a community that establishes practices and priorities based on a vision of the kind of community it would like to be, a vision that incorporates its core values and commitments. One way to work outwards such a vision is for members of a community to imagine that they have been successful in their efforts to encourage Jewish continuity, and then to answer the following question:

To what do you owe your success? What pattern of priorities did you establish, and what goals, objectives, and activities, flowing out of these priorities, gave rise to your success in creating a flourishing Jewish community?

It should be clear that to have a vision-driven community does not entail any particular existential or institutional visions. Although there are communities of meaning that are vision-driven in this strong sense, e.g. the Lubavitch community, most American Jewish communities (like Baltimore, Milwaukee, and Cleveland) are pluralistic in ways that preclude congruence between community-vision, on the one hand, and existential and institutional visions, on the other. This said, the preceding discussion suggests that even under contemporary conditions of pluralism there is an intimate connection between "community-wide vision" and vision in the other senses. The point is this: a vision-driven pluralistic community must be one that encourages its various constituencies to work toward vision-driven educating institutions, while at the same time working to preserve an atmosphere of tolerance, mutual respect, and dialogue amongst individual and institutional

representatives of different existential visions.

## APPENDIX 2: IS THERE A CIJE APPROACH TO ENGENDERING VISION-DRIVENNESS?

In one sense, the answer is "No." CIJE has no well-defined processes or formulae which it is prepared to recommend to educating strategies. On the contrary, CIJE holds that there is no across-the-board formula that will work. Institutions differ in their history, in their culture, in their leadership, and in other matters which influence the best way to proceed. This said, CIJE is guided in its efforts by a number of guiding principles:

1. While aware of models that emphasize visionary leadership and of other models that emphasize consensus-building (a la values clarification), our own model a. recognizes that both may enter in, though in varying ways depending on the institution, and b. insists that a process of serious study of different conceptions of what we should be educating towards needs to be part of the process.

2. The major stakeholders -- in a congregation, Rabbi, educational leader, and lay leader - need to be involved and supportive of the effort. Precisely who the major stakeholders are may itself vary by institution. Also, it may be that the relevant stakeholders may vary at different stages in the process. Ultimately, it is important that ways be found to engage the lay rank-and-file, especially the parents, in struggling with, adapting, and appropriating the vision.

3. "Having a vision" may not be an all-or-nothing matter. The important thing is to make progress towards being more vision-driven.

4. It is tempting to dismiss the effort to become vision-driven in advance -- on the grounds that "it's impossible." CIJE's view is that all the practical considerations that might be used to snuff out the effort need to be acknowledged but cannot interfere with the effort to understand what we're committed to and what would be entailed by a serious effort to realize this. The fact that many educational interventions have failed in advance does not speak to the impossibility of educational interventions.

a) There have been some successful interventions;

b) most educational interventions have not been thoughtfully conceptualized and/or implemented, with attention to other pertinent

variables.

5. Brutal honesty! Institutions need to be brutally honest with themselves concerning what it is they are really committed to and prepared to realize - what really matters to them. They also need to be brutally honest in assessing the relationship between their hopes and the educational practices they now have in place. Such honesty must infuse the process.

### APPENDIX 3: ORGANIZATIONAL PERSPECTIVES ON THE PROBLEM OF NURTURING VISION-DRIVENNESS

The Insights of Edgar Schein. Those looking to the possibility of institutional reform are likely to place heavy emphasis on the role of the leader. Where they differ is in the role they assign to the leader. Schein is representative of a school of thought that views the leader as the shaper of the culture of their institution. The leader is the one with an explicit or tacit vision of the kind of institution that is desirable and sets about developing and implementing policy in ways that embed that vision in the life of the institution. For Schein there is no sharp distinction between "selling" a vision and introducing it into the culture of the institution. The same processes that serve to embed the vision in the life of the institution also serve to generate support for it.

A. Schein articulates a variety of ways by which leaders can embed and transmit culture:

1. What's paid attention to/what's ignored. What gets a reaction, what provokes an emotional outburst. This is particularly true in certain contexts, e.g. planning meetings.
2. The Reward System: what gets rewarded and what gets criticized and punished.
3. Recruitment, promotion, retirement, "ex-communication," and firing.
4. Reaction to critical incidents. How does leadership react in the face of, e.g., a serious failure or an instance of insubordination. Such a reaction sends critical messages to institutional actors.
5. Deliberate role-modelling on the part of the leader.

B. The foregoing 5 ingredients represent the primary tools available to the leader in his/her efforts to embed a vision. But supporting these are various secondary reinforcers:

1. the organizational structure can be made consistent with the cultural assumptions that the leader wants to embed.
2. Routines and procedures can be made coherent with these assumptions.
3. Architecture and the design of the physical work-environment.
4. Stories and myths about the organization and its

leadership may highlight its basic ethos and assumptions.

5. Formal statements of philosophy and mission-statements.

C. The role of culture. Standing behind Schein's analysis of organizational cultures are some very basic assumptions. One of these is that culture consists of those very basic assumptions which stand behind, give rise to, and explain the visible phenomena an observer encounters. "Culture" as Schein understands it serves two distinct purposes: 1) it solves some critical organizational, task-related problem; 2) it reduces anxiety by giving participants directions concerning how to behave; it creates predictability and gives meaning to one's work.

"Culture develops around the external and internal problems that groups face and gradually becomes abstracted into general and basic assumptions about the nature of reality; the world and the place of the group within it; and the nature of time, space, human nature, human activity, and human relationships. Culture can be thought of stabilize solutions to these problems, and pattern of particular assumptions that represents these solutions can be thought of as the underlying "essence" that gives any given group its particular character. Though culture is ultimately manifested in overt behavior patterns, it should not be confused with overt behavior patterns. Culture is not visible; only its manifestations are...Culture solves problems for the group or organization, and, even more important, it contains and reduces anxiety. The taken-for-granted assumptions that influence the ways in which group members perceive, think, and feel about the world stabilize the world, give meaning to it, and thereby reduce the anxiety that would result if we did not know how to categorize and respond to the environment. In this sense culture gives a group its character, and that character serves for the group the function that character and defense mechanisms serve for the individual."

D. A desirable kind of culture? Schein avoids generalizations concerning the desirability of particular kinds of culture. A lot depends on the surrounding environment, on the size of the organization, and other such variables.

E. Inconsistent messages? Sometimes leadership gives mixed or inconsistent messages. While this can be debilitating, it is not necessarily so. The culture may evolve ways of interpreting and dealing with the inconsistency.

F. Top-Down model. While Schein acknowledges the need to achieve

buy-in, the model has a top-down quality. The job of the leader is to articulate, sell, and embed a vision in the life of the institution --- to create a particular kind of culture. Top-downness is also implicit in the suggestion that an outsider, a so-called cultural therapist, may be critical in developing insight concerning the problems and challenges of the institution.

G. Blindness to the cultural regularities, to the ethos, of an institution on the part of efficiency-minded experts or leaders brought in from outside will likely defeat their efforts at reform.

H. Schein also stresses that the job of inducing change in the culture is a very different one, depending on the stage in the institution's development. A young institution, a mid-life institution, and a mature one may require different kinds of intervention-strategies.

I. Schein proceeds to list a series of pertinent intervention strategies, designed to change the culture. Prominent among them is the possibility of organizational therapy, in which an outsider helps members of the culture achieve insight concerning assumptions and realities that survive unexamined and dysfunctional. He describes a process that involves unfreezing existing assumptions in a climate that provides the psychological safety needed to examine these assumptions thoughtfully, followed by the articulation of new, more adequate assumptions, followed by a re-freezing process in which the new assumptions enter into the fabric of things.

Says Schein: "The key both to unfreezing and to managing change is to create enough psychological safety to permit group members to bear the anxieties that come with reexamining and changing parts of their culture....The process of developing new assumptions then is a process of cognitive re-definition through teaching, coaching, changing the structure and processes where necessary, consistently paying attention to and rewarding evidence of learning the new ways, creating new slogans, stories, myths, and rituals, and in other ways coercing people into at least new behavior. ...it is the willingness to coerce that is the key to turnarounds." By "coercion" Schein seems to be referring to an ability to prevent people from leaving/exiting (though an appropriate system of incentives) while at the same time creating increasing and increasingly powerful opportunities to realize the inadequacy of the old assumptions and the desirability of the new ones.

J. As already intimated, Schein's analysis emphasizes the role of the leader as a "culture manager." Several key ingredients are required of the leader.

- i. The leader must have insight into the ways in which the culture is dysfunctional.

ii. The motivation and skill to intervene in the cultural process, which involves a willingness to communicate the painful news that all is not well and that things need to change. Dedication of a strong and visible kind to the organization's larger purpose is critical here.

iii. Emotional strength. Unfreezing requires creation of psychological safety. The leader must have the emotional strength to absorb much of the anxiety that change brings with it, and he must have the ability to remain supportive to the organization through the transition phase even if group members become angry and obstructive. The leader is likely to be the target of anger and criticisms because, by definition, he must challenge some of what the group has taken for granted.

iv. Ability to change the cultural assumptions. Leaders must have the ability to induce "cognitive redefinition" by articulating and selling new visions and concepts. They must be able to bring to the surface, review, and change some of the group's basic assumptions.

v. Creation of involvement and participation. A paradox of culture change leadership is that the leader must be able not only to lead but also to listen, to involve the group in achieving its own insights into its cultural dilemmas, and to be genuinely participative in his approach to change...The leader must recognize that, in the end, cognitive redefinition must occur inside the heads of many members of the organization and that will happen only if they are actively involved in the process. The whole organization must achieve insight and develop motivation to change before any real change will occur, and the leader must create this involvement even as he sells his vision.

vi. Depth of vision. Leadership in this sense means the ability to step outside one's culture even as one continues to live within it. It is not enough just to set goals and sell symbols. The goals and symbols and the assumptions on which they are based must be "correct" in the sense that they will indeed solve key problems for the group and will fit with other deep cultural assumptions. The effective leader needs to use his deeper vision before trying to sell anything.

The insights of Peter Senge. While Senge's approach bears some similarities to that of Schein, the differences stand out even more. Senge's approach is much more, and much more genuinely, participatory and dialogical. Below some of his main terms and ideas are summarized, chapter by chapter.

## PERSONAL MASTERY

For Senge, the discipline of personal mastery is the indispensable foundation of the learning organization. It includes two inter-related elements: a willingness to search out and to repeatedly re-examine what it is one really wants, and an equally powerful willingness to examine current reality, a willingness to get clearer and clearer about current reality -- an indispensable ingredient if one is to expand one's ability to use the current reality as an instrument of moving towards one's vision. As is discussed below, neither of these is easy to achieve. Nor is either of them a state-of-affairs that is achieved once and for all. On the contrary, we are always in danger of losing the focus on what we really want, of substituting states-of-affairs that are symptoms or means for the end that we really seek; of losing sight of e.g. the ways in which we may contribute to our current reality through the ways in which we think and act.

A. Key terms. "Discipline," "creative tension," "emotional tension," "Structural conflict (growing out of belief powerlessness and/or unworthiness, which pulls you away from personal vision even as you strive towards it)," "telling the truth," "negative vs. positive vision," "purpose," "vision,"

B. Some major themes.

1. Personal vision. Senge believes in the importance of each of us, both as individuals and as members of organization, clarifying for ourselves what it is we genuinely want to achieve. "Vision" is not "what we want - under the circumstances," but what we really want. For a vision to be "positive", the emphasis should not be on "not being X", or on being "better than Y", but on achieving some state-of-affairs that seems to be intrinsically worthwhile. To be clear about what we really want, what we really care about achieving -- this is the important thing.

2. Vision versus purpose. Vision in the sense specified differs from "purpose." As understood by Senge, "purpose" is abstract and general, whereas "vision" is typically a concrete image, which interprets the general purpose. "Purpose" is a healthy environment; "vision" is a green planet. "Purpose" is "meaningful Jewish continuity," "vision" is "children and their parents in the community engaged in regular study together." Purpose is the best space program imaginable; vision is "a man on the moon by the end of the decade."

3. Creative tension. Creative tension arises out of the recognition of a gap between one's vision and the reality in which one finds oneself. The tension is "creative" because it challenges the individual to find ways to bring the reality closer to the vision; it offers new understandings of the present, understandings that focus on the potentialities for transcending the present and

moving towards the desired future. A symptom of creative tension is often "emotional tension" -- and this is not at all bad if it can be harnessed to the effort to pull the real towards the ideal. Unfortunately, the effect of the emotional tension that accompanies recognition of the gap is often a compromise of the vision, a compromise that will render it more realizable -- but not exactly what we want. Such compromises, once made, tend to be made again and again; they grow out of an inability to live with creative tension.

4. Structural conflict. Structural conflict refers to a state of affairs in which, simultaneously as the vision is pulling the individual towards itself and towards a careful effort to struggle with current reality, there are structural features of the situation which pull the effort back down towards the real. Such structural features include, most prominently, belief in one's own powerlessness (that is, one's inability to catalyze significant change) and/or belief in one's unworthiness (belief that one is not worthy of achieving one's dreams). These beliefs do not easily give way and may undermine the effort to move towards one's vision.

5. Telling the truth. As an aid to breaking out of the cycle of structural conflict, Senge recommends "telling the truth" as the initial strategy. For Senge "telling the truth" means doing what one can not to shy away from current reality, to look clearly and honestly and without deception at what is. The aim is to develop a clear view of current reality. "Telling the truth" also and substantially involves trying to discover and root out the ways in which one's own ways of thinking and acting actively contribute to the reality one despises. It involves "breaking idols" -- squarely facing the unexamined assumptions and biases one uses to guide one's thinking and one's understanding of the real.

6. Learning. For Senge, learning is not acquiring more information, but expanding the ability to produce the results we really want.

7. Mechanisms for dealing with structural conflict. Whereas for Senge the way to break out of structural conflict is through a serious commitment to the truth, often-times we try to overcome such conflicts in less desirable ways -- e.g. through the exercise of will-power, self-motivation in which we goad ourselves to succeed, perhaps using fear as a stick, eroding our vision.

8. Work in the learning organization. For Senge, work in the learning organization is sacred in more than one sense. First, the worker is regarded by the organization as a being worthy of self-esteem and self-actualization and respect; second, work itself is regarded as a calling as an integral element of one's development as a person.

9. Strategy for clarifying personal vision. There is always a

danger of confusing means with ends. Hence the effort to clarify one's vision, especially where closure seems imminent, is to ask concerning the outcome (allegedly) sought for, "What would this outcome get me?" This is a strategy for ensuring that the means is not confused for the end. For there is, as elsewhere noted, always a danger that attention to means may end up crowding out careful attention to the vision of what you want to accomplish.

[10. Self-esteem. Self-esteem is critical in the process of personal mastery because otherwise a person may feel to vulnerable to look reality in the face, to take responsible and productive note of his or her mistakes. This point is reminiscent of Schein's comment that effort to induce change require an atmosphere of emotional safety.]

11. The sub-conscious. Senge stresses the power of the sub-conscious as an instrument in the effort to clarify and realize one's vision. The sub-conscious can integrate a vast amount of data; moreover, via imagery, it can enrich our efforts to achieve. The challenge in personal mastery is to put your sub-conscious to work for you.

12. "Compassion" is common among people with personal mastery. Compassion arise out of our awareness of the ways in which our actions and those of others are embedded in, and are prisoners of, structures and ways of thinking to which we ourselves contribute.

13. Can't mandate personal mastery! What one can do is to create a supportive climate, to encourage it, and to model it.

14. Senge, the Pragmatists, and Rousseau. There are many similarities between Senge and the pragmatists, particularly Dewey. Connection to the whole; the ideal of growth and its relationship to ever increasing competence; the sacredness of work; the recognition of problems and failure as an occasion for growth; the union of social interest and individual interest. At the same time there is a significant difference (at least with Peirce's theory of inquiry): Senge, unlike Peirce, encourages us to create, to stimulate, the irritation of doubt, via the process of struggling to define what it is we really want. In a similar vein, there is a big difference between Senge and Rousseau; for Rousseau is terribly concerned about the power of imagination to paint for us a world that transcends our ability to achieve it.

#### MENTAL MODELS

The main theme of this chapter is that we unknowingly walk around with a variety of assumptions concerning the nature of the world which we use to construct the world, never realizing that these assumptions are anything but features of the world. [In effect, we have here the Kantian notion that we unwittingly

construct the world we inhabit, never realizing our own contribution to this construction]. We see the world through the filter of these assumptions; hence it is difficult to see them as assumptions, or, when we do see them, to critique them.

Many of these assumptions are actually wrong-headed; but so long as we don't regard them as assumptions, that is, as part of our own belief-system, we can't subject them to critical analysis.

Thus, they continue to guide, limit, and sometimes seriously distort our perception of, and hence our action vis-a-vis, the world. For in the end it is our mental models, the way we see the world (e.g., the nature of organizations, the nature of "people", be they colleagues or consumers, etc.), that determines our conduct.

Hence, the critical importance of surfacing and subjecting to scrutiny the mental models that construct our understanding of the world. For Senge, a good deal of learning is a process of trying surface and examine such mental models. Towards this end, Senge identifies a number of things to look out for and a number of strategies:

1. Organizational structures that encourage more open, less stereotyped thinking In one company studied by Senge, the ruling principles were openness -- an encouraging the kind of openness one might find over cocktails after work - and merit, understood as an insistence that decisions be based, not on bureaucratic ease or friendship but on what's really best for the company.

2. The use of simulation-exercises (the SHELL example) to reveal the limits of our mental models

3. Discovering leaps of abstraction; that is, coming to recognize the ways in which certain "brute facts" turn out to be abstractions from the data; followed by an effort to inquire into the data-base and the assumptions that govern the inference. (Senge offers us the case of Laura, who seems cold and arrogant, but in fact has a hearing problem, or else is painfully shy.)

4. The Left-hand column exercise, adapted from the work of Chris Argyris. The idea here is that on the right side one describes one's actual or anticipated conversation with Y, while on the left side of the page one writes out what one is really thinking -- the beliefs and the assumptions that inform one's responses but which do not get communicated to the other person. What often emerges on the left-side are elements of one's mental model.

5. Balancing inquiry and advocacy. Too often we enter discussions as advocates for our view. This affects both the way we present our view and the way in which we listen to other views. Senge calls for a different approach. In presenting one's own view, for example, one's job is not to cast it in the strongest possible light, but in such a way as to reveal one's assumptions, one's data, and reasoning and to invite others to inquire into them. The goal is not to win the argument but to jointly find the best argument, through a willingness on part of the parties to reveal their thinking to one another in an open way.

There is an interesting connection between this strategy and the left-hand column exercise. The Left-hand column exercise reveals the extent to which our conversations fail to achieve the requisite openness, due to various assumptions that one makes, sometimes unwittingly, about the other's attitudes and abilities. This point is developed extremely well by Argyris in his discussion of the ways in which what he calls our "defensive routines" undermine our conversations. (See his discussion of this matter.)

6. Mental models can drown the best systems-insight. Moreover, mental models have a kind of staying-power. Even after they have been surfaced and exploded, they may return if their contraries have not been carefully institutionalized.

#### SHARED VISION

The development of shared vision presupposes an environment that encourages personal vision and personal mastery. Where there is a shared vision, there is a coincidence of personal vision and communal vision; it is not a matter of bracketing one's personal vision.

When it is achieved, shared vision is not an idea but "a force in people's hearts, a guiding ideal that connects them to the organization, to their work, and to one another in a richly meaningful way. Senge takes note of the longing for feeling connected to others and suggests that this is one of the functional by-products of the development of shared visions.

Shared vision, Senge stresses, is a very powerful force; indeed, the pull towards the status quo, the tendency towards inertia, is so strong that only a shared vision -- a vision of a state-of-affairs genuinely thought worthy of commitment -- can counteract this power and energize real change away from the status quo.

Once such a vision is shared, its presence is often sufficient to establish a willingness on the part of people to expose their data, their reasonings, perhaps even their mistakes. The reason is: they really care about realizing the vision, and nothing will stand in the way of this -- not even their own foibles.

"With a shared vision, we are more likely to expose our ways of thinking, give up deeply held views, and recognize personal and organizational shortcomings. All that trouble seems trivial compared with the importance of what we are trying to create."

Conversely, says Senge, in the absence of a great dream [as George Counts might have said], pettiness prevails.

While shared visions may have their beginnings at the top of the organization, this need not be the case and many shared visions have their origins elsewhere. The important point is that it is not the origin of the vision but the process through which the vision becomes shared that is crucial.

The process through which a vision becomes shared needs to be one in which the participants are not "sold" or "inspired" but a powerful thinker, but one in which they are encouraged to enter into an open, candid honest dialogue with those representing a new idea.

There are several ways to relate to an organization's vision, ranging from compliance (begrudging or willing) to enrollment, all the way to genuine commitment. The key is to achieve general commitment. There is no way to guarantee this; people will and should make their own choices. But, says Senge, here are some guidelines: 1) Be enrolled yourself; 2) Be honest. 3) Don't sell.

The road to shared vision is not necessarily an easy one, and there are predictable obstacles along the way:

1. Anxiety concerning the ability to unite in the face of our initial diversity of outlook. Along with this goes the fear that my own views will get lost in the process, will not be expressed in the final vision. There must be patience in this arena, as opposed to a premature desire to close ranks by coming to agreement. It is indeed ok for people to emerge with multiple visions -- so long as they feel that theirs has been heard and taken seriously.
2. Gap between the ideal and the real: how can we possibly make this transition, given size of the gap.
3. Given the day-to-day demands on our time, we don't have the time and energy to engage in this process

4. Loss of respect for one another. When the climate of open dialogue, of advocacy balance with inquiry, is lost and people feel that others are trying to proselytize them, then the quality of the conversation erodes.

To his earlier distinction between purpose and vision, Senge here adds a third notion, that of core-values. Core-values are the day-to-day guiding principles of an institution -- e.g. openness and merit, or integrity, loyalty, autonomy, etc.: how we want to act, consistent with our mission, along the path towards achieving our vision. Says Senge, a vision that is not consistent with the values people live by day-by-day will not inspire genuine enthusiasm. Vision, purpose, core-values jointly represent the governing ideas of the organization -- what we believe in.

Senge stresses that vision can become a living force only when people truly believe that they can shape their own future.

"The simple fact is that most managers do not experience that they are contributing to creating their current reality. So they don't see how they can contribute towards changing that reality...But as people in an organization begin to learn how existing policies and actions are creating their current reality, a new, more fertile soil for vision develops. A new source of confidence develops, rooted in deeper understanding of the forces shaping current reality."

This point is critical, suggesting a twofold connection between mental models and vision. 1) The road to vision requires a careful, candid understanding of the current reality which is to be transformed, an understanding that overcomes the destructive effect of our mental models; 2) and this is the new point, our confidence that current reality is capable of transformation may itself depend on our recognizing the ways in which -- through our ways of thinking, our assumptions, and our decision to act in certain ways -- we contribute to the maintenance of this reality, a reality which has hitherto seemed independent of us.

[Note: though Senge is writing about the world of capitalism, he has appropriated a variety of insights that are at the heart of much Left-wing thinking. For example: 1) Senge's insistence on open, honest, non-manipulative dialogue as the road to insight bears comparison to Freire's ideas on dialogue; 2) His vision of work as sacred is close to an ideal espoused by both Dewey and Marx; 3) his suggestion that current reality is a social construction to which we and other unwittingly contribute echoes insights of Kant, Hegel, Marx, Peter Berger, and even Thomas Kuhn.]

Insufficiency of Personal Mastery and Shared Vision. A critical point is this: an organization whose members participate in the discipline of personal mastery and who own a shared vision are not by virtue of these things alone able to work effectively and fruitfully with one another. To accomplish this, to become capable of team learning (which is a necessary condition of being a learning organization) requires additional abilities.

How team learning contributes. To work and learn as a team is an extraordinary energy-saving device, since otherwise our energies are scattered in varied and sometimes oppositional directions. But team-learning is also to be valued because, through dialogue, genuinely new insights can emerge. That is, the group working as a single higher intelligence that absorbs the intelligence of each of the participants and weaves them together in unexpected ways, may produce unanticipated and exciting results that could not have been predicted.

Dialogue as compared with discussion. Such insights are to be expected not so much from discussion (in which individuals trade positions and the rationales that underlie them) but from dialogue. In dialogue, conversation flows freely in sometimes unpredictable directions. The conditions of genuine dialogue are: 1. Collegueship: regarding the other as an equal who is worthy of carefully being listened to; 2) a willingness to suspend one's assumptions. This does not mean letting go of them but literally suspending them before oneself and the others for careful examination; 3) a facilitator who can keep the dialogue on track.

Analogue to dialogue. As analogues to the kind of synergy and shared intelligence Senge associates with dialogue, he offers us two examples: the Celtics at those moments when they are "in a zone," and a jazz group making music together.

Obstacles to dialogue and team learning, in general: defensive routines. Relying heavily on the work of Argyris, Senge emphasizes the ways in which defensive routines stand in the way of the kind of team learning that is necessary if members of an organization are to engage in significant learning. The account of defensive routines briefly developed below relies heavily on Argyris.

Function of defensive routines. "Defensive routines" are behaviors people engage in which serve to protect them from a sense of incompetence, from being regarded as imperfect, as wrong, as responsible for failure -- as being anything less than fully in control. Defensive routines function to deflect blame and responsibility. Such routines are an outgrowth of what Argyris regards as a widespread theory-in-use, which he refers to as Model I thinking. Model I thinking is defined by the following assumptions: our goal in social situations is: a) to remain in unilateral control; b) not to surface uncomfortable, negative thoughts and feelings concerning the other.

Such defensive routines are antithetical to genuine learning. For example, they stand in the way of our ability to acknowledge and therefore learn from our failures. For failure, in Model I thinking, is intolerable.

Invisibility of theory-in-use. Oftentimes we are taken in by our espoused theory and don't recognize the ways in which we are guided by a very different set of assumptions (our theory-in-use). The result is that, in practice and unwittingly, we often do the opposite of what we say we are trying to do. For example, we may tell ourselves that are avoiding making the other feel threatened and uncomfortable by "easing in" rather than "being blunt", whereas in fact the effect our approach is to make the other defensive and resistant to our view, even as he/she may not express this.

[Note that confrontational and "easing in" approaches both presume that we know and need to transmit some truth.]

Strategies for dissolving defensive routines. One way to dissolve defensive routines is to create a social climate in which it is ok not to know everything or to have made a mistake. Another strategy is to do an exercise of the kind Argyris describes as "left-hand column" exercise. Role-modelling on the part of the leadership may well be important here -- although as Argyris points out, the troops may not follow in this direction; that is, they may continue to work with Model I thinking.

The critical question: how defensiveness is handled. What distinguishes a learning organization is not the absence of defensiveness but how defensiveness is handled.

Opportunities for practice. Just as a symphony or a basketball team need to practice to develop into a team, so too should organizational teams have the opportunity to practice. Practice allows one to stop the action, to go back a step, to experiment with new moves, etc. In architecture and other fields, opportunities to experiment with "virtual reality", with a true to life but not immediate situation, may provide the arena in which team-skills can be developed and refined.