



THE JACOB RADER MARCUS CENTER OF THE
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 2: Dan Pekarsky, 1981-2011, undated.

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Change Think Tank. Meetings. (Folder 4 of 4). 1997-1998.

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FACSIMILE TRANSMITTAL SHEET

TO: Dan PeKarsky FROM: _____

COMPANY: Dept of Educational Policy Studies DATE: 7/13/98

FAX NUMBER: 608 262 9074 FAX NUMBER: 212-532-2646

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URGENT		FOR REVIEW		PLEASE REPLY

NOTES/COMMENTS:

Aitz Hayim

WITH ALL OF MY HEART, WITH ALL OF MY SOUL AND WITH ALL OF MY MIGHT

Today is the sixth anniversary of our first Aitz Hayim service. It is, in many ways, a time of pure celebration--accomplishments beyond our wildest imagination. But beneath the surface despite or perhaps because of our success, it is a time for self-reflection and decision making about how we will continue as a community. Please indulge me a few moments to reflect on these six years and how the first Torah portion we read speaks to me poignantly, yet so differently than it did 6 years ago.

There are 126 synagogues in the Chicago area. Twenty-nine are Orthodox, 36 are Reform, 26 are Conservative, 16 are Traditional, 9 are Lubovitch, 4 Reconstructionist, 3 independent, 1 humanistic, 1 egalitarian and 1 interesting.

And that one is us. That's how we are listed in the *JUF Book of Life*. What makes us interesting?

Only one thing. We say we are.

Any other community in the Chicago area could so define itself. But we are the only one who chooses to do so. And what does that mean that we do?

And Moses said, "I must turn aside to look at this marvelous sight." He chose to look at the burning bush with fresh eyes; he saw what other passersby did not see. And it was with his consciousness that he created holiness.

There are other communities who bring more historic sources to their Torah discussions than we do. There are other synagogues who have more "aesthetic" music, some with more chanting and tambourines and less constrained services. There are many with far more intense social action agendas and others with more ties to the establishment. There are communities who do much better jobs of caring for their members in need and there are far more comprehensive educational programs.

But there is no other community that has our complex perspective on the range of human activities

and utilizes so much that Judaism has to offer in them. In the students of Jewish sociology we are undefinable. Our services draw from the renewal movement but our agenda is not that of the renewal movement. We are the number one synagogue in support of Federation but we are most challenging in evaluating the status of methods of their programming. We advocate more religion in Jewish communal life yet oppose the imposition of religious standards on the community.

We are the only minyan that dachins with b Cohanim. And we are the only community who mal pledges to JUF at the Torah. Our mission to Israel last year was a Covenantal Journey and we were the only mission in the history of the UJA that davened on the b on Shabbat morning after having a Shabbat dinner at secular kibbutz. We publish a Thanksgiving Haggadah to tell the American story in the form of our Jewish me of freedom. We believe that prophesy continues in the words of Abraham Lincoln, Martin Luther King, the signers of the Israeli Declaration of Independence and even in a *People Magazine* story about a mensch which why we recite them with trop as haftarah.

We are here because our ancestors came to act with the sense that the destruction of the Temple did not mark the "end" but rather signified the occurrence of paradigm shift. In fact, making changes and responding to the challenges of different circumstances in different ways is what the long history of the Jewish people is about. That change from Temple and sacrifice to synagogue and prayer was but one of many. There were others before and there were others afterwards. Whether it be taught by Irwin Kula, Donniel Hartman, Steve Katz, Barry Holtz, Alice Shalvi, David Kraemer, Larry Hoffman, Alvin Rosenfeld, or Joel Grishaver there was always one unchanging message in the history of the Jewish people and Judaism-- our tradition is a dynamic

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and changing one.

When Rabbi Yohanan ben Zaachi took the words in today's Torah portion which say the shofar shall be sounded at the time of sacrifices and decided to sound it on Rosh Ha Shana without the Temple and without sacrifice, he set the tone for generations of innovators in Judaism whether they be Rashi or Maimonides, or ordinary folk who just did things in their own way and set the pattern for the future. How many people remember back 500 years when Rabbi Leon da Modena shocked his congregation in Venice and was almost thrown out of town when he introduced an all male acapella choir to a Jewish people who had not had synagogue music for 1400 years.

These changes didn't occur just for the sake of change. Some were done by necessity. The Temple was destroyed. Others changes occurred because we found appealing the way people around us did comparable things. Do you think it a divinely inspired coincidence that the era of the great hazzanut, when cantors sounded like opera stars, occurred at the same time Jews were buying opera recordings and listening to opera on the radio in Europe and America. 4'11" tall Yosef Schmidt, who was killed in a Swiss "camp", was not only the leading hazan in Berlin but starred on the most popular weekly radio program in Germany in the early 1930s. (You may recall that we remembered him when Aitz Hayim participated in community Yom HaShoah teaching which emphasized how much a part of European popular culture Jews were).

Do you think it odd that the style of Jewish food in different areas resembles the food of their gentile neighbors? Or that the dress of Jews has always resembled like the dress of their neighbors or the architecture of the synagogues based on neighboring buildings? Or that our prayers are sung in the style of the rest of the world? Ayn Kelohenu will always have been a Lutheran marching song first and Aleinu a Viennese Catholic chant before it became ours. Or that halacha is local. In Poland the historic waiting

time from meat to milk is many times longer than in Holland, the cheese capital of the world.

Our purpose in creating Aitz Hayim was to respond to Jewish needs that we felt were not already being met in the Jewish community. To create opportunities for personal expression within the Jewish story. To make the service understandable and meaningful--for prayer to reflect our needs and concerns without diluting it to avoid challenge by ideas we don't accept or find relevant on first read. We wanted to allow people to bring into Jewish life their wide range of human affects. And we wanted to take the insights and lessons of our interaction with text and tradition into what we do "secularly"; thus infusing it with holiness. If there is any halacha that we discussed in Aitz Hayim that I personally violate regularly, it is talking on the cell phone when driving. My action fails to live with a reverence for life.

At our very first Shabbat of study celebrating Steve Silberman's 40th birthday, Neil Gilman outlined our Jewish master story, our perspective on the world that transcends generations and denominations. Jews organize the world on the premise that people were created in the image of God with infinite worth. Our path is to go from slavery to freedom to covenantal responsibility. This loving covenant lives and develops through mitzvot. That framework remains for us eternal. How each community lives that out in its deeds and metaphors is influenced by their time, place, and circumstance. Hellenistic Greece, medieval Europe, 19th century Germany, Morocco, Israel and 20th century America inevitably lead to different Judaisms. Larry Hoffman identifies that as the master image. To be an effective and relevant community, these two axes, the master story and the master image must resonate.

The metaphors of our observance must reflect our perceptions of ourselves and the world we live in. To come to shul on the High Holidays to experience ourselves as lowly supplicants before a king does not fit for most people today. Rather we see ourselves as proud people crowning the king while realizing that the universe is far more changing and complex than

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any scientist or engineer could understand. Irwin defines this theology very clearly, when he says "We stand tall unlike the generations of Jews who felt beaten in their daily lives yet we bow down to God as we acknowledge how much is beyond our control. We don't ignore what we have accomplished nor do we pretend that we have it all under control like the world of Disney." That is why it is not frivolous but profound that on Yom Kippur we dance and then all (not just the rabbi and cantor) prostrate ourselves before the God of the universe.

We realized that the first generation after the Shoah and the establishment of the State found their place in Jewish history by building and doing -- settling the Land and rescuing the Jews in Russia and Ethiopia. That was the Kedushah of their generation. The genius of Yitz Greenberg was that he told them so. We knew that the challenge to our generation was to integrate the holiness of visiting Russia, Project Renewal and AIPAC into our daily lives. Before there was an Aitz Hayim, Steve, Irwin and I presented a city wide conference which was an attempt to bring Federation and Synagogue leaders together to integrate the Jewish experience. We quickly realized that neither was ready or able. We realized that we would have to create our own institution to demonstrate to the entire Jewish world, one among many possible different ways, to achieve this purpose in our generation.

One of the steps in that process was to remove Judaism from the domination of professionals. You don't need a rabbi to be dead or to make a mi shebarach. You don't need a professional to practice Judaism for you. You don't need to create an institution that preserves values and norms that you then are free to ignore elsewhere. We simply said if it is *shabbasdik* for a family to bring a hallah and wine to Ravinia for a Shabbat dinner, it should be appropriate for our entire community. There are communities that see going to Ravinia as desecrating Shabbat. We respect them and wish them well. And then there are communities that say individuals can set their personal standards but their institutions should maintain standards distinct from the way their

people live. We know that this works for a number of Jews; and that is their right. But we think that it doesn't speak to many Jews who ultimately know that the commandment was not, "Remember the Sabbath and keep it holy in institutions that have norms different from the way you live." That is why we work to influence the JCC's: be open for Shabbat dinner and the Uptown Cafe soup kitchen to serve the most holy meal of the week, Shabbat dinner.

A prime example of this is how we eat Jewishly (keep kosher). For most Jews whether or not they observe, Kashrut is a meaningless system of the picayune. Nobody uses the health rationale anymore even though it was propagated by Maimonides in keeping with the thinking of his time. There are just too many healthy Gentiles.

That is why we studied what is behind kashrut: discipline, reflecting the creative process by making separations, and distinctions and eating with a reverence for life. Each perspective leads to emphasizing a different aspect of Jewish eating. For our community, it seemed that eating with a reverence for life speaks most meaningfully to us.

Eating Cheerios is different from eating a cow. The Kosher "one on one" slaughter of animals as a religious experience by a *schochet* is different from the impersonal unholy non Kosher slaughter. When our pilots were firing cruise missiles in the Gulf War, it was like a video game. When they saw actual human bodies on the ground, they realized they were killing living people. That is what eating Kosher meat ought to symbolize, a compromise with vegetarianism, a tension in the paradox that we lustfully choose to kill and eat living animals to enhance the quality of our own lives. That's not 20th century new age. That's Torah.

At Aitz Hayim trust and community also became important in our kashrut. We believe that it is more meaningful, more inclusive and more life affirming and affecting to be a trusting community that risks mistakes but encourages people to elevate their consciousness and to bring and share their kosher food at our Shabbat dinners no matter how else they eat at other times. Other communities who emphasize different meanings will prioritize differently within the

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system of Kashrut. They will have professionally prepared food supervised by an orthodox masgiach which emphasize a different aspect of meaning. For me, this appreciation of holy slaughter by Jews and its abandonment by Christians leading to their eating treif meat was expanded when I was in Jordan. How could I from this perspective consider the meat slaughtered by Moslem schohetim done with a reverence for life to be treif?

We believe that Judaism is not just a feel good experience. It begins with a sense of people having both good and bad impulses. The tradition and the community are vehicles for making each one of us act differently and behave in more Torah, like ways. Steve Silberman has taught that if the halachah does not lead you to spend your time or your money differently it is probably marginal and trivial. That is why sacred discomfort is what JUF Shabbat is about. Judaism has always said that if you only give from your heart, you are probably missing the mark. That is why lifting the Torah to give it honor without giving to our tzedakah fund when it was needed is the ultimate of trivial feel good Judaism. When our ritual impinges on us to love our neighbors as ourselves because we were once slaves in a foreign land, we live holier lives through Judaism. Isn't that why our most powerful moment in our service is the v'havienu and the Shema. It integrates the spiritual, the personal, the interpersonal, and the ultimate agenda for the greater Jewish community.

Mordechai Kaplan really was the architect of American Judaism. He understood that our civilization went far beyond the narrowness of a particular aspect of our tradition whether it be ritual, halacha, fund-raising, or a swimming pool attached to a synagogue as an add on. Judaism is a total full fledged civilization covering the spectrum of human life. When I said to Steve Katz one day, I couldn't see how Kaplan could have thought the synagogues could possibly fulfill such an agenda, he immediately said, "You're wrong because you are right." Kaplan knew the rabbis and the synagogues were incapable of integrating the whole of Jewish life. He had hopes for the JCC's.

For millions of Jews who abandoned the stifling orthodoxy of 19th century Eastern Europe, socialism, Zionism, and unionism were their vehicles for expressing their Jewish hopes. That is why it was not just trivial cuteness but a profound appreciation of who we are that on Labor Day weekend, we looked at the contributions of David Dubinsky of the ILGWU and Sidney Hillman of the Amalgamated and how they created unions, distinct from many others, that fulfilled visions of social justice. That union label on the corner of your garment says that the person who sewed it, works in dignity to earn the money to feed the kids and run the house. What tzitzit could promise more?

So how do we decide what we do? Isn't this what some call pick and choose Judaism as opposed to true mitzvah Judaism? There has never been Judaism without interpretation. Never. Never. Never. There has never been any "pure meaning." Steve Katz pointed out that there is no way to read the Torah without interpretation. David Kraemer taught us that most questions considered in the Talmud were left with multiple possible interpretations and ensuing behaviors. Furthermore, the rabbis were pluralists in that they emphasized that you were to respect and even adhere to practices different from your own when you went to different communities. For example, if you went to a community in which chicken was parve, you enjoyed "chicken parmigiana".

There is no pure way to "Remember the Sabbath and keep it holy" without interpretation. Donniel Hartman was with us and studied multiple historic Biblical conceptions of Shabbat that would lead to very different actions. And they would be very different and very contradictory. And they would all be authentic. A Shabbat of rest?, of joy? of being like God?, of wholeness, of reflection? Of distinction from the rest of the week? Play them out as Donniel did and they will all be different. And they are all legitimately and authentically Jewish.

So how do we decide? Is it whim or personal idiosyncrasy? I don't think so.

When Larry Hoffman was here he taught a three faceted model of looking at Jewish life. In the pre modern world, and continued primarily in Orthodox

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thinking, is the importance of separation--distinctions as an emphasis on the holy versus the secular. Fences around the Torah. Don't get too close. Do it right. We all apply this in much of our lives and in our Aitz Hayim prayers and rituals. But we are not a community organized around emphasizing barriers and boundaries. We have confidence that Judaism will do well in the world's marketplace of ideas and attitudes.

The modern period, perhaps as exemplified by the non-Orthodox denominations emphasized a search for truth through scientific knowledge. It became important to know the history and explore the archeological realities. Knowing what happened and what it originally meant would give Judaism status in a world in which we were critiqued by outside study. We study, Torah, history and previous models of Jewish existence. Our fascination with the history of prayers and our reclaiming rituals from their period of origin play a significant role in our discussions and in our sense of authenticity.

David Roskies introduced the concept of "creative betrayal" which means that often people save the tradition by criticizing, ridiculing and even eliminating parts of it that no longer work. The great Yiddish authors like Sholem Aleichem, I. L. Peretz, and I. B. Singer rebelled against the Judaism of their era and created the Judaism we remember. Who can recall the poignant story of Bonshe Sweig and not realize how Judaism survived by challenging itself.

When on Yom Kippur we replaced the traditional Ayla Eskarah, the medieval poem about the martyrdom of the Rabbis in Caesaria, with letters from a story in the *New York Times Magazine* between a German Jew and his West Virginia cousin during the Holocaust, we were changing the words but we were maintaining the traditional Yom Kippur idea that the Romans chose to punish the rabbis for the crime of Joseph's brothers failing to treat him like a brother. Irwin, who had not cried during the traditional recitation since he heard his father chant it thirty years ago, could not complete the words.

Finally in the post modern period the theme is

not the search for distinction or truth, but for meaning. That is the framework we utilized in creating Aitz Hayim. We realized that we (those of our generation and those who created our tradition over thousands of years) gave order to the world through the meaning we give it in our stories, our prayers and our actions. One fundamental continuity that we follow is that we link ourselves to the generations by reinterpreting the same texts. Now neurobiologists tell us that the stories we tell, the songs we sing, the values we emphasize in the most basic ways have biochemical impact on the we process new data. By immersing ourselves in Jewish culture and perspectives, we actually create "Yiddishe kaps."

Our world today can be lonely isolated and frightening, and we are searching for meaning. Alvin Rosenfield described the Hasidim of Antwerp who found meaning in their shared lives isolated and distinguished from the rest of the world. We in our community have decided not to be separate and live in a world apart from others. We have rejected finding holiness in our isolation. To put it concretely there is no one among us who has chosen to eat with a reverence for life by only going into facilities that serve Kosher food. We are always picking and choosing. We, as a group in this room, have not chosen to make Shabbat a day of withdrawal from all else in life. Other communities do so, some successfully, but we and 90% of Jews do not. Rather we have made our challenge to make Shabbat *shabbasdik*.

Our goal was to create a community to make who we are holier. All Jewish communities share that. But we began with the idea that for us in our time, our task is to bring that holiness to where Jews are in all the entrenched aspects of their lives. Some communities choose to perpetuate themselves by building fences. We chose to make ourselves so desirable that we could thrive in the greater world.

Six years ago when we read this Torah portion, Steve and I felt like Eldad and Medad, those two roguish characters who were off prophesying by themselves. Joshua wanted to stop them. Moses stopped him and said, "Would all my people be like them." Most of the people who were at that service were not interested in our agenda. They remain our

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AITZ HAYIM CENTER FOR JEWISH LIVING

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friends but that live different Jewish lives. Now 6 years later we have succeeded far beyond our wildest imagination.

Our ideas are being disseminated by Jack Riemer and used by hundreds of rabbis; we play an ongoing role in influencing the Jewish community in Chicago and other places around the country, and we remain the lab for Irwin as CLAL teaches rabbis and other professionals. We are looked to as the one place that consistently and ongoingly meets the challenge of making Judaism relatable to Jews who are not fulfilled and satisfied in other established communities. People pay attention to us and see how we are doing. At first they wondered, would we get off the ground? Then they wondered could we continue. Now they ask, can we maintain the energy and creativity without getting bogged down in our own orthodoxy?

Now as I read this Torah portion I relate to Moses. Moses was distressed: Why have you dealt ill with Your servant. I cannot carry these people who want to return to the way it was in Egypt.

My voice is gone and my spirit weary as we try to be a community that lives out these premises and evolving conclusions we have reached while at the same time accommodating those in our community whose Jewish needs are fundamentally different. No one ever said we could be a microcosm of the entire Jewish world. We only want to be one model. We can only be one model. Our goal is to have successes that stimulate the entire Jewish people and failures and mistakes that do not destroy it.

There are 120 synagogues in Chicago who define themselves in terms of what they want to preserve. We define ourselves in how we want to be. No one issue is crucial, we have and will miss many opportunities and make many mistakes. But to choose to abandon our path is fatal.

If you ask Steve who the founding hero of Aitz Hayim is, he will join me in saying General Aharon Yariv, the head of military intelligence during the 6 Day War, our friend and our teacher. He guided us. "Pursue your goals if you believe they are valuable. Don't give up and don't become deterred. And

never forget the element of surprise." One day in the car when he was visiting in the United States, he told us this story. He was an aide to Golda Meir and occasionally he was sent to brief Ben Gurion who was in retirement at Sde Boker in the Negev. He was there on Friday afternoon before Shabbat and the old man was alone. He thought he should take him home for Shabbat dinner. Then he thought how presumptuous of me; this is Ben Gurion. He chickened out. "This", he told us "was one of the biggest mistakes of my life. "Learn from it, boys." When we have followed the General, we have never gone wrong; when we have deviated from the path, we inevitably get in trouble. The first page of our first bulletin had words of greeting and his assessment of the peace process. Shortly thereafter, he suffered a fatal stroke. I am sure he would be truly pleased to be remembered in a synagogue that davens Shir le Shalom.

Two thousand years ago at a time of great change and turmoil the Jewish people faced four alternatives. Those same four alternatives exist today. They are ours to make as the Aitz Hayim Community:

1. To commit suicide: We climb the mountain and remember those zealots. But that is not desired by any of us.

2. To turn to Christianity: Though many opt out in the Jewish world our community is certainly all agreed that we believe that Judaism and our being Jewish is important.

3. To be Essenes in cozy haimish little caves content in our own personal Jewish happiness. This may indeed be a comfortable home for some, but for me it is neither fulfilling nor is it worthy of the effort that Aitz Hayim requires or the results it has already shown if we are trying to be a creative model for the greater Jewish world.

4. To join the Jews of Yavna or Tzipori in proudly bringing Judaism to face new challenges in a different and now inviting world and thereby living within and adding our little piece to our dynamic tradition. In that way will we be true to our purpose: To live in the image of God and to be guided forward through the mitzvot as we live them today in America in 5758.

I pray and I act so that Aitz Hayim will be a community capable of this halacha--of this path. ♣

Marc Slutsky

From: Chava Werber <CWerber@compuserve.com>
To: Dan Pekarsky <danpek@macc.wisc.edu>, Dan Pekarsky ...
Date: 6/29/98 1:36PM
Subject: Change think tank participants and their e-mail addresses

Dear Dan,

Nessa wanted me to send you a list of the participants listed on the Change Think Tank address list so that you could confirm their e-mail addresses. Please let me know if anyone needs to be added to the list or if any additional changes need to be made.

* Karen Barth: 104440.2474@compuserve.com
* Pearl Beck: 110422.3156@compuserve.com
* Gail Dorph: GZDorph@compuserve.com
* Adam Gamoran: Gamoran@ssc.wise.edu
* Amy Gerstein: amy.gerstein@ces.uu.holonet.ne
* Ellen Goldring: ellen.goldring@vanderbilt.edu
* Patricia Harte: pcharte@compuserve.com
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* Barry Holtz: baholtz@compuserve.com
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* Karen Jacobson: kjcije@aol.com
* Alvan Kaunfer: ac838@osfn.rhilinet.gov
* Henry Levin: hank@leland.stanford.edu
* Lisa Malik: 110422.3160@compuserve.com
* Nessa Rapoport: 74671.3370@compuserve.com
* Susan Stodolsky: s-stodolsky@uchicago.edu
* Linda Thal: no e-mail address listed

CC: Nessa Rapoport <74671.3370@compuserve.com>

Today's things

- 1) Homework
- 2) Elements + New elements
- 3) Conception of day
- 4) Conception of seminar

Ideas/Elements

1) 9³⁰-4

2) Sessions on Vision + Mini-groups
= Eli/Amy Karen + Alva Re: Strategic Conception

3) Session 1:

- 2 Conceptions of Jewish life/learning → Great Synagogue
- 2 "great synagogues" → Vision → Sources
- Introspective exercise re: "great synagogues"
+ Roots of conception
- Metaphysical/spiritual exercise (including Bensching)

4) Additional ideas: { Karen Response to criticisms
+ questions that have
arise vis-a-vis
Karen-idea

5) Specializations/functions in grp:
Eli - Sources
Gail, teach/learn
Karen - strategy/Amy/Hanka

6) Integrating
strong content
& process.
= challenge

From: "Lisa S. Malik" <lsmw@pacbell.net>
To: Nessa Rapoport <74671.3370@compuserve.com>, Dan Pe...
Date: 6/19/98 3:41PM
Subject: Definitions of Success

Dear Nessa & Dan:

As promised, I'm sending you some "definitions of successful synagogue change" to follow-up on our change think-tank discussion last week (6/11). The first part of this e-mail includes my own definitions of success (as of 6/18), and the second part includes definitions of success culled from the interviews I conducted with some of the leaders of synagogue change projects (Note: I have only included some of the project leaders' definitions of success in this e-mail since I am still in the process of writing up my summaries for the "map of the landscape" of synagogue change projects). For confidentiality reasons, please do not distribute this list of definitions with attribution; you can certainly consolidate the list, but at this point, I'd feel uncomfortable with anyone else knowing 'who said what' (i.e. which definitions go with which projects). Please note that these definitions of success (like the 'hunches' of factors linked to success) are unedited; much of what follows obviously needs to be condensed.

I hope this helps.

Shabbat Shalom,
Lisa

LISA MALIK'S DEFINITIONS OF SUCCESS 6/18/98

- A) "Content" definitions of success (i.e. possible objectives for a synagogue change project, vision of synagogue life desired)
- a synagogue in which there are opportunities for people of all ages to be engaged in Jewish living and learning
 - a synagogue in which "learning" and "doing" are co-existent throughout the institution:
 - experiential components are part of all Jewish education activities (e.g. don't just learn about prayer, do prayer)
 - education is part of all experiential activities (e.g. don't just read the Torah on Shabbat morning, also engage in Torah study & provide written commentaries to read during the service)
 - a synagogue in which multiple generations and multiple target groups in the synagogue are engaged in Jewish education (not just children, not just adults)
 - a synagogue with "shul spirit" (i.e. where congregants and professionals feel so connected to the synagogue that they take pride in synagogue activities, they view the synagogue as their primary affiliation, and they always strive to make it better)
 - congregants viewing the synagogue as their primary affiliation and community (vs. a fee-for-service institution)

B) "Process" definitions of success for the project itself:

-evidence that synagogue activities/programs are taking place that are consistent with the change project's vision of synagogue life

-awareness of and participation in the change process by people throughout the synagogue (professionals and lay people who are part of the "change team" as well as those who are not)

-widespread support and advocacy of the change process throughout the synagogue (beyond the core "change team")

-institutionalization of the change process throughout the synagogue (in the school & synagogue; viewed as legitimate and valuable by professionals, lay leaders, and other congregants; viewed as legitimate and valuable by people who are part of the "change team" and by those who are not)

Bergen County Federation's Synagogue Leadership Initiative

Definitions of "Success":

The Initiative has not yet officially defined "successful change".
Participating synagogues have been encouraged to develop their own
definitions of success through the leadership consultation meetings.

Beth Am Israel, Penn Valley, PA:
The Design Project:
Designing an Education System for Inter-Generational Neshamot

Definitions of "Success":

meeting the measurable objectives of the project:

*to increase synagogue attendance at Shabbat morning services, religious festivals, and synagogue classes by 50%

*to increase involvement in other synagogue activities by 15%

*to increase family practice (e.g. Shabbat rituals, independent study, increased interest in Jewish social groups, increased integration of Torah principles into family and social discourse) by 45%

*to improve the "Jewish self-image" of children and adults by 10% (i.e. defining one's self-image primarily through a Jewish frame of reference, making a more conscious use of a Jewish cultural and religious framework for decision-making and problem solving)

*to increase adult participation by 50% (e.g. participation in Shabbat rituals and activities)

Boston Continuity Commission's Change Initiatives:
Sh'arim, Me'ah, Youth Educator Initiative

Definitions of "Success":

Definitions of Success across all 3 initiatives:

- *synagogues articulating visions of who they are as congregations and asking themselves strategic questions such as, "What are we here for?"
- *synagogues seeing themselves as lifelong learning institutions (for youth, adults, and families)
- *synagogues implementing creative programs that reflect their vision
- *synagogues experimenting with new (or 'improved') professional staff and improved educational programs for youth, adults, and families
- *synagogues changing their governance structures in ways that reflect their new self-perception as lifelong learning institutions (with an integration of the governance structures for youth, adult, and family education): synagogues' governance structures being comprised of collaborative teams of stakeholders who represent different developmental stages (youth, adults, and families)

Sh'arim

- *synagogues increasing the quantity and improving the quality of Jewish Family Education programs
- *synagogues truly "buying in" to Jewish Family Education, as reflected in their personnel, programs, policies, procedures, governance patterns, and general orientation as a family-friendly community (examples: instituting a family education committee, providing nametags at events to promote a sense of community, having a full-time Jewish Family Educator on staff, having membership policies that encourage families to join)

Me'ah

- *increase in number of students enrolled from year to year
- *increase in number of sites applying to be selected as Me'ah sites
- *extent to which Me'ah is well-known and well-reputed throughout the Greater Boston community
- *student satisfaction with the curriculum and faculty
- *improved adult Jewish literacy: cognitive knowledge
- *involvement of Me'ah students and graduates in the life of the host institution
- *involvement of Me'ah students and graduates in Jewish communal life

Youth Educator Initiative

- *expanded pre-teen and teen programming in synagogues
 - *improved pre-teen and teen programming with upgraded Jewish content
 - *high advocacy for and visibility of Jewish teen programming in synagogues and in the Boston community at large
 - *synagogues instituting new governance structures that design, oversee, and implement Jewish youth programs
 - *synagogues being transformed into institutions where there is integration between formal and informal educational opportunities for teenagers/pre-teens and where teenagers/pre-teens have a more substantive role within the organization
-

Cooperating Schools Network

Definitions of "Success":

*rabbis, educators, and lay leaders planning and thinking differently about education in their congregations:

looking for intergenerational opportunities which take into account children, adults, and families when planning educational programs

*extent to which participating congregations are achieving each of the 10 specific goals of the network:

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

*the continuation and expansion of the CSN by the Jewish Reconstructionist Federation

Designated School Project

Definitions of "Success":

*the quality of the school climate
(successful if relationships are better and there is more interaction
between staff members)

**We are in the process of redefining our outcome variables. After all,
we are ultimately interested in "improved education". If everyone is
just talking to each other and there is improved communication, but the
educational system is not improved, I would not be happy. These are
just sub-goals to the greater goal of creating a better school and
having more effective learning".

Experiment in Congregational Education (ECE)

Definitions of "Success":

- *Jewish learning being one of the most visible and pervasive things going on in the synagogue, with deep Jewish learning going on in many ways throughout the institution
- *congregants' response to outsiders' inquiries about what is most important in the synagogue: "We are about Jewish learning and about Jewish living".
- *Jewish learning and values incorporated into various aspects of synagogue decision-making (including fiscal and membership policy)
- *more Jewish education going on in synagogues (more frequent opportunities for Jewish learning, more people engaged in Jewish learning, Jewish education that is deeper and/or broader throughout the synagogue, Jewish education that is text-based and substantive rather than "borderline Jewish learning" such as Jewish cooking classes)
- *many lay people engaged in Jewish learning
- *text-study and other forms of Jewish learning regularly incorporated into synagogue meetings (including board meetings, task force meetings, committee meetings) because of the perception "This is the way we now do business"
- *lay people doing most of the teaching in the synagogue (e.g. in the school, on the bimah, and at board meetings), with the professional staff acting as the facilitators and consultants who teach the lay people how to teach by being the "enablers" of Jewish learning in the congregation
- *parents having high expectations of what their children should get out of Jewish education in the synagogue (beyond Bar/Bat Mitzvah training)
- *having a governance structure that reflects the synagogue's emphasis on education
- *an energized school that is "doing creative things"
- *well-developed leadership partnerships between professional and lay leaders in synagogues
- *synagogues "doing business completely differently" as a result of the ECE process
- *congregants being more self-reflective (e.g. talking about programs after they have been implemented)

Koret Synagogue Initiative (KSI)

Definitions of "Success":

- *implementing more programs in synagogues
- *involving more people in synagogue programs
- *involving people more deeply in synagogue life, so that individuals "get more out of the synagogue" than when they started
- *enhancing participants' Jewish identity
- *enabling synagogues to "see the big picture"
- *changing the congregation's understanding of itself:
enabling each synagogue to have a clearer understanding of its mission and vision and what it wants to offer its congregants (in whatever arena it chooses to focus)
- *"some movement towards something"
- *growth: increase in synagogue membership

McKinsey/UJA-Federation Strategic Planning Workshop for Synagogues

Definitions of "Success":

- *synagogues successfully completing the strategic planning process
- *a synagogue's ability to launch a series of new initiatives as a result of the strategic planning process
- *increased level of activity within each participating synagogue
- **"sustained positive activity for the better" in participating synagogues
- **"positive impact on the synagogue community over the long haul"
- *synagogues attaining their own self-defined measurable goals (e.g. If a synagogue's vision is to have 100 people attend Shabbat morning services and they achieve that goal, that is success for that synagogue).
- *improved sense of Jewish community in the synagogue
- **"improved Jewish continuity" in synagogues

 Grants Program of the Jewish Continuity Commission of the
 UJA-Federation of New York

Definitions of "Success":

"Successful" diffusion of the initiative in the institution

(from Lilmod U'Lelemed-Volume One- p. ii):

*adoption of the initiative/innovation: taking root initially

*implementation of the initiative/innovation: thriving & managing
 change during the period of the grant

*institutionalization of the initiative/innovation: sustaining momentum
 beyond the grant period

Indicators of "successful" synagogue initiatives

(from Lilmod U'Lelemed-Volume One- p. 17):

* increased financial support & participation by volunteer synagogue
 leadership

* expanded synagogue membership

* increased rates & intensity of participation in synagogue life &
 membership

* more dynamic synagogue culture

Note: These are all possible indicators of success which reflect a
 cultural shift in synagogues. However, not all synagogues are
 interested in achieving all of these goals; these four things do not all
 need to be in place for a synagogue initiative to be considered
 "successful".

Other definitions of "success" culled from Lilmod U'Lelemed-Volume One

*successful integration of the initiative into the institution's culture
 (pp.2,8)

*ease of implementation and institutionalization (pp. ii, 3, 4)

*sustaining the innovation (p.6)

*ability to offer enhanced programs (p.8, 10, 13)

*successful adaptation of the change/innovation, including an ability to
 weather staff turnover (pp. ii, 12,13)

More ultimate definitions of "success" (based on interview notes):

**"success" at the institutional level: programs being transformative
 for the synagogue as a whole; programs successfully "turning the boat
 around".

**"success" at the institutional level: synagogues being transformed
 into more compelling, dynamic, and vibrant communities of Jewish living
 and learning

**"success" at the institutional level: initiatives being so
 successfully integrated into synagogue life that they are "in the blood
 stream" of the institution

**"success" at the individual level: individuals' lives being
 transformed; individuals connecting to their Jewishness through their
 involvement at the synagogue:

Unless there's a magic that individuals can experience & bring them closer to their Judaism, we haven't painted a picture of success. It's about individuals connecting to their Jewishness. We believe that it has to happen through communities, which we define as institutional settings. All of the other stuff (definitions of success) are the "enablers".

("We want institutional change in order so that people can experience the power of Judaism. All of that stuff defines successful change for the institution, but institutional change is not an ends, it's a means to success. Change for what? Institutional change is still just a means to a greater end-connection to Jewish life for individuals.")

Orthodox Caucus L.E.A.D. (Leadership Education And Development)
Rabbinic Fellowship Program

Definitions of "Success":

* successful implementation of rabbinic fellows' projects in their host synagogues and local communities

* successful achievement of the objectives of each fellow's project

(Note: The intention of project-based management training is to implement projects with measurable outcomes, with each rabbi's project having a different definition of success depending on its particular objectives.)

*rabbinic fellows' learning valuable lessons from the implementation of their projects that they can feed back into improving their management styles

*rabbinic fellows becoming mentors for other Orthodox rabbis around the country

*rabbinic fellows taking leadership positions in local and national Orthodox organizations

*rabbinic fellows publishing articles in Orthodox publications so that they can speak their vision and visions beyond their individual synagogues

UAHC's Partners for Synagogue Change (PSC)

Definitions of "Success":

"Specific outcomes are difficult to predict, as each PSC team will be grappling with its own synagogue culture and interests, but among the transformations we (UAHC) hope to see are the following":

- *growth and vitality within the synagogue, as reflected in the development of havuorot, increases in membership, active and diverse adult engagement, and solid attendance at services
- *commitment of synagogue board members to fulfill long-range plans
- *heightened level of Jewish engagement at board meetings
- *diminishment of personal tensions, ennui, and burn-out at board meetings
- *board members remaining involved in temple life after rotating off the board
- *heightened level of avodah (increased participation in communal worship and personal Jewish observance) and g'milut chasadim (increased participation in acts of social justice) among synagogue leaders
- *deepened interest in and familiarity with the history and personal experiences of the synagogue and its individual members
- *increased capacity for lay board members to speak in the vocabulary of Judaism
- *successful fund-raising based on Jewish concepts of tzedakah, wealth, and blessing
- *perception of board membership not as a final outcome of Jewish responsibility, but as a training ground for regional and national leadership
- *rabbis having a deepened understanding of synagogue management and new models of serving the congregation

In one of the participating synagogues, success is a process, not an outcome: e.g.) if the synagogue leaders can articulate a vision, generate some discussion about it in the congregation, and reach a consensus.

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To: Nessa Rapoport <74671.3370@compuserve.com>

Subject: Hunches

References: <199806021758_MC2-3EEC-B46E@compuserve.com>

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Dear Nessa: It was great speaking with you today. I look forward to our meeting on Thursday, June 11. I'll send you the monthly update info. under separate cover.

As promised, I'm sending you the "hunches" re: factors linked to "successful synagogue change". Most of the hunches are 'informed opinions' of synagogue change project leaders. I have also included some of Karen Barth's hunches, my dissertation-based hunches, and some hunches culled from a review of the literature.

Enclosed in this e-mail is the long (unedited) version of all of the hunches to date; I still have a few more interviews to conduct, so I'll be adding more hunches to this list in the next month. Keep in mind that interview respondents did not all define "successful synagogue change" in the same way. To some people, "success" means that the change has been institutionalized in the synagogue; to others, "success" means that more people are attending programs that have been prompted by the change project. Of course, there are also variations based on the "content" of the change process: For some Synagogue 2000 interviewees, "success" might mean "the respiritualization of the synagogue", whereas for some ECE interviewees, "success" might mean "a synagogue that is a learning community and a community of learners".

Anyway.. here are the hunches (Please note that transferring the file to e-mail caused the formatting to disappear, including indentations, bold-face type, and italics. My comments or questions on some of the hunches were italicized in the main file, but they now just appear in

parentheses) :

L'Hitraot, Lisa

CONFIDENTIAL!!!!

Hunches: Factors Linked To Successful Synagogue Change

updated 6/3/98

Bergen County Synagogue Leadership Initiative

-a stable professional and lay leadership

(no turnover?)

-professional-lay collaboration

-a starting point of stability, coupled with the sense that things can get better

-vision (this is a must!)

-Resources don't hurt. To make real change, money is essential.

-availability of consultative and/or supportive services

Bergen County

1) vision that is shared by the professional and lay people (lay leaders & others).

"If your rabbi is not in favor of this, you're not going to get anywhere. But, by the same token, if it's just the rabbi's vision, it's not nec. everybody's shared vision".

(This can be facilitated by changes in training of professionals: rabbis, cantors, & educators: need to train practitioners as well as scholars)

(Current rabbinic training is a stumbling block to having a shared vision)

2) a way of keeping the vision before people's eyes so that they don't forget why they are there .

(e.g.) moving away from mundane board meetings;)

(This can be facilitated by leadership development for lay leaders)

3) Moving away from a culture of mediocrity

(e.g.) not just getting warm bodies to be board members; having higher expectations of members)

4) breaking it down to manageable steps for synagogues & taking them through the process

5) Things get done when there is someone whose job it is: someone from the inside & the outside

6) Adaptation to individual synagogues' contexts

7) Sharing between synagogues of different denominations (e.g. in conference or symposium format): so don't feel isolated, & becomes a vehicle for community change too

Beth Am Israel

-Successful change occurs through Na'aseh Venishma. You must create facts

on the ground and try things on an experimental basis. When you only discuss change or a new idea, people get caught up in the possible negatives and a fear of change, and anxiety sets in.

-You can't do radical surgery; must build on previous change. Change is incremental & evolutionary.

-You must know what you want in order to effect change.

Beth Am Israel

-Leadership with a vision and passion

-a quality, caring professional staff and lay people who are "people-people" and committed.

-the feeling that this change is a mission, that it's critical to the lives of our kids and their parents and to the next generation. (who needs to feel this?)

-to be willing to take criticism and to believe that nothing is written in stone. (who needs to be willing to take criticism & to believe....?) (professional & lay leaders)

-to allow people to taste, experience what you want them to intellectually deal with.

Boston: Sh'Arim, Meah, & Youth Educator Initiative

-interfacing with larger national & Movement partners

("This is so important. It's so clear to us, so we don't understand why others don't get it)

-"collaborative efforts"ábetween professionalsá (frequent collaborative meetings) from the Commission, CJP, BJE, and the Movements: "That's what makes it work" because "the collaborative nature of it makes everyone want to get on board"; This is especially important for the Youth Educator Initiative

-"It doesn't matter who drives it... as long as there is a contagion"

-teams of lay leadersáfor maximum buy-in

-relationships between lay leaders and professionalsáso that no one owns the agenda exclusively

-links between change projects (e.g. Five yrs. ago, Jewish Family Education was just viewed as incremental change. Now that there is adult study with Meah and that there is a link between Meah and Sh'arim, JFE is now viewed as a major change in institutions)

-synagogues need to ask themselves "what are we here for?" and to articulate a vision (what they are as a congregation) & to create programs that reflect who they are

-synagogues need to see themselves as lifelong learning institutions (Is she articulating "ends" or "means" to an end? Is this the goal of these change projects, or is it a factor that contributes to some greater goal?)

-learning by actual experimentationámakes it work

(experimentation mode-learning together-has created new structures)

-governance structure needs to change in response to experimentation

(Is this a goal/"ends" or "means to an end"?)

-need to give the synagogues latitude to experiment with the different realms of family, youth, and adults.

(Continuity Commission gives a partially articulated program product, but leaves a lot up to the individual synagogues; e.g.) Commission doesn't tell synagogues exactly how JFE should look in their sites; not a cookie-cutter approach: opportunities for synagogues to individualize)

-(At the change project level): 3 services provided by the

Commissionáwhich help change institutions and the community at large:

òmoney

(e.g. CJP helped finance JFEducator positions beyond the first few years, and gave raises too),

òconsultative support, and

ònetworking opportunities ("We have nurtured a group of family educators ... that network and share ideas")-sharing & trust

-Commission had a sense of 4 components of changes in synagogues;

1) professional development, 2) new profession, 3) new programs, 4) governance comprised of teams. All 4 components involved an interplay of all lifelong developmental stages (?)

("But if we had said up front, "You need these 4 things to change", our projects never would have gotten off the ground")

(Lisa: shouldn't expect all changes to take place upfront? shouldn't expect governance structure to be a certain way a priori; acknowledge that certain changes will not take place immediately; can't require certain structural elements in place a priori... very different from Hartford's list of readiness criteria)

-Our approach is very different than some other change projects: Our approach is not "change one congregation at a time with one consultant per synagogue"

Different factors linked to success in the three different projects:

(couldn't really articulate the different factors for each)

òYouth Educator Initiative: synagogues need to think in terms of vision and advocate for that vision

Boston: Sh'Arim, Meah, & Youth Educator Initiative

-"Each of these three projects requires different pre-existing conditions and different strategies. If the goal is to change the whole institution, this will require yet a different set of strategies"

-"Because these three projects are so different from each other, there are different means of institutionalizing each of them":

òSh'Arim: Since we are creating a brand new field and profession and institutional infrastructures and since our aim is to institutionalize and embed this kind of change, we need:

consultation, training, reporting, and buy-in

òYouth Educator Initiative: aim here is to take something that is already in synagogues and to make it better or different

("So, the means we employ with the Youth Educator Initiative are different than what we do and what we ought to do with Sh'arim... In Meah, something different yet again")

òMeah: aim here is just value-added; not to replace existing adult learning opportunities; just to create a cadre of literate leaders...

-If each of Boston's three projects are like three different "trees", a synagogue change project that seeks to change the whole institution is like a "forest". If each of the "trees" require different strategies to facilitate success, then certainly the "forest" will require yet a different strategy and set of pre-existing conditions

-synagogues are different than public schools, so theories from public school literature don't apply

Given these caveats, some factors that are linked to successful change:

-teams (but this doesn't work in all institutions)

-a flatter hierarchical structure may be more conducive to change, but this may not be possible in all institutions

-open lines of communication are what are key

-leadership

-resources

-reflective process (but this can only be done at certain institutions)

-confidence-building experiences

Boston: Sh'Arim, Meah, & Youth Educator Initiative

"I don't take as a given that there is much synagogue change going on...

We're still in the first 3 or 4 years... Hawthorne effect...lots of "rah rah" ..But.. show me in 5 years if JFE is still there? Is it

institutionalized? Is it in the form that was originally envisioned?...

Have governance patterns changed?

Given these caveats, some factors linked to successful change:

-need an organization that can learn from itself (Senge, Argyris)

-need an organization that has a sense of what it wants to look like (not necessarily a vision)

-resilience: to understand that things are not necessarily so straightforward

-alliance between professionals and lay leaders

-optimism: a "can-do" attitude, "we can do it"

-resource slack (time, energy, \$)

("ECE would not have worked unless someone took responsibility for managing the process at the synagogue level. e.g.) At Temple Shalom in Newton, the Educator hired another staff person so that 1/4 of the Educator's time could be devoted to ECE)

-"manipulation of symbols"; good packaging: You can do radically different things, but these things wouldn't be noticeable unless they are packaged well

(symbolic representation of what you're trying to do)

-linkages between synagogue's project and what's going on in the wider community(?)

Often, "solutions precede the problem" (Therefore,.....?)

-good researchers

Chizuk Amuno

("not sure how much is replicable to other synagogues" "difficult to recreate")

-an outstanding staff (e.g.) One major donor-who gave largest single gift ever- to religious school because parent of kids in school & has "tremendous admiration" for the Religious School principal and his creativity)

-rabbi's role in choosing these staff members, seizing opportunities, and working around people's strengths and skills (e.g. Instead of hiring a 3rd rabbi to address the needs of older adults and Adult Ed, the sr. rabbi suggested hiring the current director of the Stulman Center-an experienced and skilled adult educator; The sr. rabbi took \$ that was allocated for a 3rd rabbi and used it to hire someone in a different position..He took advantage of the person with these incredible skills..."and you have success"

-team approach to how the staff functions

-staff is highly regarded and allowed to do their jobs; lay leaders are not overly intrusive. ("In many synagogues, there is a tendency for lay people to be overly intrusive. I certainly believe they should have a role (I was a lay person), but the staff members are treated with integrity.. very unusual..difficult to recreate")

-unusually capable "professional volunteers" like Lee (Myerhoff) Hender: comes in and does work, tremendous abilities, creativity, "a wonderful lay person to have on the team" (was chair of Planning Committee in August 94, is chair of Development/Fundraising Committee, is incoming president, is on board of CIJE)

-integrity of lay and professional leaders ("There is integrity here.. not to say there aren't politics or issues, but there is a standard of integrity, from the way the staff is regarded, and the way the staff is able to operate")

-leaders who have the ability to see the need for change and programmatic growth

-campaign process and the way solicitations have taken place (personal,

and 2 on 1)

-professional and appealing printed materials that convey "This is something you want to be a part of"; The synagogue "feels successful"

(Lisa notes:

-professionals and lay leaders who are involved as leaders in other Jewish and Jewish ed causes: e.g.) Linda Blumenthal is the president of the Central Agency for Jewish Ed. in Baltimore; e.g.) Lee Hendler is on board of CIJE)

Chizuk Amuno(Baltimore)

"If you go to Adam Gamoran's list "Markers of Change in Communities", it's all there.. characteristics that would move a community from one place to another"

(same characteristics that lead to community change can be applied to institutional change?)

-"It starts with leadership"..

"You can't do anything without a leader-on the lay and professional side. It couldn't have been done alone-by just the professional or just the lay leader... healthy organizations don't work this way"

"There has to be a professional and a lay leader"

"The ideal situation is a senior rabbi and a senior lay leader (not necessarily the president) leading the change process.. but you can't change without leadership"

Role of leader: to develop a mission and to passionately convey it to others, to inspire confidence in others, to lead others in taking risks

-(Components of leadership that are linked to successful synagogue change):

-clear laymen/trustee boundaries: the ability for lay people to wear two hats

(e.g. parents in the school and also members of the board-who can think beyond their individual personal issues; Lay people shouldn't generalize from their own personal experiences.)

-lay leaders who act 'professionally' : Lay people have to know when they can use information and when to keep their mouths shut in order to make themselves more effective.. Information is power.. When we deal with people in their spiritual home, there are lots of boundary issues. Laymen often can't divorce themselves from their synagogue. You don't

leave your Judaism behind you (like you do when you leave other NPO board meetings). It's a part of you and it does cloud the waters)

(L-That might explain why in some Conservative synagogues with regular shul-goers, people get more 'personal' and 'unprofessional' at board meetings-as in diss. case study)

-leaders with skills

e.g.) lay leaders who know how to implement strategic planning processes

-role of lay leaders ♂("They could not have done this without me")♂("The role of laymen is not to do it, but to lead it" by bringing other lay people in)

It doesn't necessarily have to be the President, but it has to be someone whom the President does not see as threatening.

-rabbi's role:

"It doesn't just happen because the rabbi thinks it's a nifty idea"

"I could see where a dynamic religious school head could drive a change process"

"However, we do have a great rabbi":

- passion

- integrity

- clear-headedness

- doesn't compromise standard of excellence; doesn't like mediocrity

- inspires devotion

- built an incredible professional team

(many people are against focusing on charismatic leadership, because it is not transferable but maybe "charismatic leadership" is transferable if we think of it as a set of skills that can be developed, rather than as a set of fixed traits)

-energy & confidence for the change expressed by the rabbi & key lay leaders

-a vision: a plan for getting there

(Tautology?: need a vision for successful change, but isn't the creation of a vision and mission statement one of the successful outcomes of the process?)

(Perhaps she is listing vision as a factor linked to success in synagogues.. i.e. you need to have a vision to be successful, and that is why the creation of a mission statement is part of the change

process)

(Need to acknowledge that vision is an underlying assumption of a factor linked to success & an intended outcome of several change processes)

-discipline: to hold yourself accountable, not to let your eyes get bigger than your stomach

-patience: appreciation that change takes time, no matter how good the plan is;
acknowledgment that "change is tough"

-process & communication:

"...lots of process stuff.. and synagogues aren't good at this.. getting as much buy-in as you can & helping people to identify and to invest (\$ & themselves)

-money: to invest in the change process; It's not enough for a bunch of well-intentioned lay leaders and professionals to want it; need financial investment upfront for bringing in consultants and/or staff people to manage the change process

-good outside professional leading the process

("I cannot overemphasize the importance of a good outside professional...")

(Rabbi Shelly Dorph, head of Ramah)

-someone who knows how institutions operate

-someone who knows the power of ideas that are clearly stated

-someone who has clarity about how to lead the change process

-You need a religious person, but not necessarily a Jewish person

(someone who understands how religious values can guide organizational decisions)

(perhaps we can learn from the mega-church phenomenon-Willow Creek Church)

-It needs to be done within a Jewish context:

-participants (lay & professional) need to be learned Jews & need to acknowledge what they don't know... so that when outside consultant comes in and says, "hachnasat orchim" or "tzelem Elohim", you know what he's talking about. This lets us "get away from Disney"

-a culture supporting the particular type of change (educational, in this case)

("You couldn't have done this de novo"; "We didn't say, 'Let's get into the education business'" ... "It doesn't just happen because the rabbi

thinks it's a nifty idea")

-culture of excellence: very hard-working place; lay leaders & professionals do not like mediocrity

-culture of integrity: You have to know that you stand for something and that it's inviolate. At Chizuk Amuno, it's education & it's what we stand for as an organization.

Chizuk Amuno (Baltimore)

"I don't know how it happens. That's just my job"

-clear sense of what you want

-surround yourself with people who buy into your dream (with \$ and other support)

-good staff (and this requires money, and lay people who allow us to hire good people and pay them well)

-"When you get the right staff and support, things happen"

-staff has to be really together; staff at C.A. is very close.
"The staff is a community and that's absolutely crucial"

-Top-Down:

"If we had to wait for people to say they needed a day school, it would never have happened. You create something good and people will come or not. If it's top notch, people will come"

"It's my view that lay men can't do anything without professionals except bungle, and professionals can't do anything without laymen".

-"There are ways to set up programs so that you don't fail"

e.g.) Don't announce the goal of a \$ campaign until you've raised some \$ from key lay people

e.g.) "We treat everything with seriousness so we don't fail. If we feel we can't do it well, we don't do it"

"We strive for excellence. We have standards. Once we meet the standards, we just up the ante"

e.g.) You have to plan properly so that you can't fail

e.g.) You have to articulate what you want.

e.g.) You have to have lay people buy-in

e.g.) You have to have a good product

e.g.) You have to evaluate (we're not very strong on this, but the

people who work here do have a pulse on what's going on, so we see what's failing and succeeding)

-(Things we're still missing:
an organizational structure that meets our needs. We need an organizational specialist/expert in charge who has some sense of the culture of a synagogue, who can help us rewrite our job descriptions. Now it's a lost cause to know everything that's going on & to have a pulse on everything. When we started, this was manageable. Now, we're just too big and there's too much going on)

(Lisa notes:
+dynamic rabbi with vision
+staff-driven synagogue?
+large staff that's paid well
+high standards + healthy dissatisfaction with the status quo; never feel that success has been achieved; just up the ante;)

Cooperating Schools Network

-some synagogues are in "states of readiness" more than others, but still hard pressed to define what "readiness" means
(Stumbling block to change: absence of readiness)
("readiness" a la Sandy Dashefsky and McKinsey, vs. ECE & KAB readiness process)

-need at least one person who is your idea champion
-need to give people a chance to experience a different form of Jewish education & to "dwell in a 'mikdash me-at'" as a prelude to structural reform; to show that it's worth making changes
-process of selling it to congregations
-rabbi's role ("I think the rabbi needs to be on board")
-(From Cleveland experience): "Unless you have a clear additive philosophy of how change will take place, you can wear your rabbis and educators to the ground with too many initiatives; need to prioritize initiatives; you can lose your focus on the bigger picture"
(Brandeis JFE Conference 1996: King Kong vs. Godzilla: initiatives collide because they come from different places)

(Lisa note: distinction between institutionalizing a particular innovation vs. institutional change in general)

from Al Regel Ahat: Lessons Learned Along the Way (from "JRF Covenant Grant Final Evaluation- April, 1996"):

(Factors linked to success of CSN in synagogues:)
-shortening the "shadow" between the initial enthusiasm generated in a group setting (in San Antonio, before CAJE 17) and the later

~~Explain~~
*
/

follow-through:

through increased staff time and attention to ongoing communication within the CSN (had a Bronfman Fellow for this purpose-who devoted 20 hrs. per week to the CSN); conference calls between participating congregations working on the same Jewish value or in the same geographic area

-systems: including rabbis in the planning: not just as symbolic advocates for Jewish learning, but also involved in thinking about their work with families and adults

-systems: leadership support from either the rabbi or educator or a lay person (or all three)

(One rabbi worked in 2 different congregations, and CSN 'worked better' in one synagogue because the educator helped the task force both maintain and perform)

-systems: institutional memory & how deeply awareness of the (change) project has spread throughout the system (These are required for the project to last even after professional staff members leave the synagogue)

-curriculum: "good education is good education": "The same educational care, judgment, and creativity that guides our best teachers with kids needs to be similarly present for adults and families"

-curriculum: "a greater role for texts"

-vision: "it comes from many angles": Michael Fullan: Vision-building does not follow a linear "ready, aim, fire" model; instead we need to find ways to productively "ready, fire, aim" , at least in the beginning stages of collaboration.

(Note: In Fall 1997 article in Journal of Jewish Education: Two conventional wisdoms that Jeff Schein debunks are: "Vision and goal-setting are critical elements by which a congregation or community can fulfill its educational potential" and "Integral to any worthwhile vision is the primacy of education over schooling". How CSN's approach differs from the "vision thing" in Jewish education: "Practically, we are certain that creating new visions for Judaism and Jewish education-however it might embrace a dynamic understanding of Jewish life-will weary the very best of visioning committees. Jewishly, we believe that our own work in the Reconstructionist movement of the past decade evolving a guiding educational philosophy of "spiritual peoplehood" grounded our whole process. Educationally, we believe that our emphasis on a single lens of a Jewish value promotes what Leroi Daniels has described as the "noticing function" of educational innovation that is more fundamental than either the action or planning modes of most models of educational visioning and research" (pp. 6-7))

(Lisa clarification: "visioning " process vs. "vision" provided by some outside entity or Movement philosophy that gives outside direction to the change process)

- "integrating mediocrity with more mediocrity leads to mediocrity": not sufficient to just have as a goal "integrating adult, family, and child-oriented Jewish education"; focus has to be on integrating high quality education

- "There are always unanticipated consequences as changes work their way through a system" (e.g. At one synagogue, parents got angry at kids' mid-week Hebrew school teachers because their programs seemed unimaginative compared to the family education programs)

- Godzilla vs. King Kong: Often, interactions between different Jewish education pilot programs create synergy. However, sometimes, multiple initiatives do not mesh easily.

ECE

- "There may be a list of 10 things that help facilitate change, but you don't need all 10, maybe just 7"

"Something I hope you will be able to say at the end of this study:

'It takes 10 things to succeed, but if you have these 7 things then it's OK'"

(e.g. One synagogue-Beverly Hills- doesn't have a wonderful task force chair, but change is still happening there)

Things that help facilitate change:

Good things but not necessary:

- wonderful task force chair

- skills needed by lay people, such as expertise in market research or focus groups or text-study ("It adds something quite wonderful to the process when people are able to add their expertise" "You can do it without them, but they really add")

- process: It would be hard to do this without "community conversations", "visioning" and "text-study"

- process: structured 4-step "readiness" process ("It doesn't have to be these particular 4 steps, but do need some "readiness" process) (Cohort #2 had a readiness session before the Kallah & it really made them come together at the Kallah, vs. Cohort #1

Necessary:

- a bunch of different lay champions of the change process who are excited about ECE, put energy into it, and "talk it up" because it's the most exciting thing that's happened

(and the more lay champions the better)

- a rabbi who is interested in learning & who is willing to put in the time as a participant in the ECE process without taking over (rabbis who "get it")

(Some rabbis will "never get it", e.g.) continue to read their mail at

meetings)

-a good coordinator (lay or staff) at the synagogue level: someone who schedules meetings, keeps people informed and plugged in, smooths ruffled feathers)

-skills needed by educator (still figuring out what these necessary skills are)

(From Isa's article with Michael Zeldin, "Change in Jewish Education: Prescriptions and Paradoxes", Agenda Jewish Education, JESNA:

List of the reasons why changes failed to take hold or to achieve their desired outcome-based on Jewish ed. reforms & ECE & Day Schools 21st Century:

- 1) Those who advocated change had a vision of a future state, but little understanding of how to translate their ideas into concerted and effective action
- 2) Advocates of change didn't anticipate and were not prepared to handle the resistance they would encounter because one or more of the following factors were at play: inertia, resignation, fear of the unknown, aversion to risk, failure to communicate a compelling vision in concrete and accessible terms
- 3) The decision to change was made by too small a group
- 4) People's conception of change was too simplistic and mechanistic. It was assumed that change could be accomplished either by telling people what to do; purchasing a new textbook, curriculum or program; sending people to a workshop in which they would learn how to make the change; or bringing in a new staff person
- 5) The institution did not have enough resources (either human or material) to support the change.

Lessons about change learned from ECE and Day Schools for 21st Century

- 1) Readiness for change requires both a baseline of stability and a modicum of dissatisfaction with the current situation
- 2) Change must be rooted in tradition while focused on the future
- 3) Successful change is both planful and emergent
- 4) The institution's leaders must be able to inspire others, even as they are inspired by them
- 5) Change agents must take the long view while navigating the short term
- 6) Successful change requires both action and analysis (managing all of the balancing acts in #1-#5 by reflecting and being self-critical of process); (need at least one person on task force who is skilled at analysis and evaluation)

(Lisa add:

-a process that learns from itself; built-in feedback mechanisms for continuous self-improvement and refinement of the process

(e.g. learned from Cohort #1 that readiness was missing.. so added it to Cohort #2)

ECE

- "There is no simple way to change"

- "Strategic planning is not synagogue change"

- Underlying theory behind ECE: "In order to bring about a change in any part of the synagogue, there ought to be a change in the whole. Change in a part requires some change in the whole".

- "...can learn from ECE but can't offer it as a product, unlike Synagogue 2000"

- need some internal resources (money & staff)

- a gifted educator (but only if you have the appropriately supportive synagogue culture that is conducive to change)

- rabbis who are not authoritarian and who do not view learning as "unidirectional from pulpit to congregation"; "Authoritarian rabbis are not very good candidates for synagogue transformation. You might have some cosmetic changes with clearly bifurcated roles and an authoritarian structure. How much is the charismatic model a hindrance to great change? That's a great question"

(means to an end or is non-authoritarian rabbinic leadership an end in & of itself?)

- some openness by professionals (rabbis) to "give up Jewish turf" and for lay leaders to help "develop the turf"

(Note: rabbis are vulnerable in ECE because they're required to change)

- some openness by professionals and lay leaders to redefine how they work together

- need some level of stability

(If changing rabbis every two years, it's not going to happen)

(no big changes in the size of the membership, + or -)

- capacity to develop an appreciation of process (among key professionals and lay leaders) ("That's a struggle every step along the way. Some say, "Let's stop talking and start implementing new programs")

- the development of a capacity to go for the long haul; the recognition

that things won't happen quickly and dramatically

-enhanced capacity (?)

-stumbling blocks to change:

òthe "brick wall" of congregational culture and structure
("Even the most visionary educator will only be able to go so far without the appropriate synagogue culture" that is conducive to change)
òrabbis who view learning as unidirectional from pulpit to congregation;
rabbis who are authoritarian

Hartford's Synagogue Initiative Program (S.I.P.) &

Laatid: Synagogues of the Future

-There needs to be some kind of consulting structure in place that's very ongoing; someone to help synagogues walk through the process (at meetings and 'backstage')

-the "nurturing piece" of the consultant: being able to hold hands and take synagogue leaders through the process; So: need a local person to be a confidant and to be there in person
("Marion, from Boston BJE, was wonderful but she was too far & wasn't on-site")

-"wraparound": We need to build strong lay and professional leadership that can do this without the consultant

(so have programs to build capacity of leaders, such as classes at Hebrew College & the Hebrew Institute)

-need to ripple it out to other committees within the synagogue so that it becomes part of how we think (not just the 15 people who are involved in the change process, or else the process won't take hold& the 15 people will get tired out)

-unclear about role of the rabbi

(Isa: "If you don't have the rabbi, you're in trouble"; Susan: "I'm not so sure")

Sandy: "I think it's easier, process-wise, to have the rabbi on board, but he may not be necessary for change to happen". In one synagogue, rabbi was on board but he left; In another synagogue, the rabbi was not on board initially & was even somewhat hostile; He's come around but he's not proactive.

-process that includes needs assessment of congregants

(didn't do this for S.I.P, but would like to do this for Laatid)

-readiness pieces are key (criteria of readiness that are pre-requisites to involvement in the change project)(Note: synagogues had to fill out a survey/checklist to apply for SIP)

(She included the following items in a list for her Hebrew College Class on Institutional Change 1996-Readiness: What Institutions need for Systems Change):

- stability of lay leadership and staff
- charismatic new lay leaders
- history of lay and professionals working together
- strong collaborations between lay leaders and professionals;
- internal champions for the project-professional & lay leaders with vision
- no other distractions (such as raising money to build a new building); not so many side agendas that you are sidetracked
- basic administrative competence
- time
- financial \$ & human resources
- a can-do attitude/culture
- a sense of positive pride
- colleagues (?)
- a positive political climate
- a vision
- a place that looks at goals and purposes

(The following 2 pts. were mentioned during the interview, but were not included in the written checklist:)

- knowing how to process conflict
- openness to risk taking

(Note: "readiness" a la McKinsey pre-requisites, vs. ECE and KAB readiness process,/ steps to prepare for the next steps of the process)

(She included the following points in a list for her Hebrew College Class on Institutional Change 1996-Levers to Help Create Change:)

- 1) a process to build lay/professional relations
- 2) assistance in forming the vision, the dream
- 3) experimentation/risktaking (not seen as failure or success)
- 4) professional training
- 5) models to guide the process
- 6) money
- 7) expertise-PR, technical aspects
- 8) demographic information about your community for planning
- 9) knowing how to process conflict
- 10) "can do attitude" (isn't this a readiness criterion?)(can something be a readiness criterion & a lever for change?)

Koret Synagogue Initiative

- KSI's underlying theory of change: "synagogues need more staff capacity in order to be able to make things happen"
- "outside momentum": impetus of outside entity (Koret)
- status associated with the Koret Foundation and being awarded grants

for hiring Program Directors

-buy-in by synagogue staff and lay leaders

("An outside entity like a Foundation or the Federation can provide momentum, but until staff and lay leaders at the synagogues buy-in, it is not really going to happen")

-planning in synagogues enables their Program Directors to be more focused

-teams of lay leaders and professional staff coming together (like Syn. 2000)

-on-site advisory committee (people to whom the Program Director can go to get input)

-synagogues there are effectively and professionally run with respect to "business stuff" (office staff support, dues structure, Bulletin coming out on time, good process for counting membership units, process for integrating new members)

("A structural barrier to success is that some synagogues aren't run very effectively... If they don't have the support of the office staff, etc....")

-the role of the rabbi is important (but not sure about what the ideal role should be) ("We picked synagogues that had strong rabbis who determine what goes on in their congregation and are pretty focused on that.. That was a good criterion because it means that rabbis are very invested in the project. However, the rabbi can also be a barrier if the Program Director has a different vision.. That could be a problem..")

(Note: 'Ideal rabbis' selected by KSI are very different than 'ideal rabbis' for ECE)

McKinsey/UJA (NY) Strategic Planning Workshop for Synagogues
Characteristics of the process that are conducive to success:

-continuity of facilitator & continuity of synagogue leaders

-the discipline of the process that forces synagogues to reach conclusions

(i.e. having a timetable that forces decisions to get made)

-skilled facilitator who helps bring people to closure & who helps clients reach solutions

(McKinsey consultants guide the process rather than doing the work themselves)

-having an outside presence (consultant) who is removed from the day to day history and politics of each synagogue)

-having a group of people in the synagogue who want to change and who are heading in the right direction ("change readiness")

From "Achieving Transformational Change in Synagogues"

(presentation to Continuity Commission Jan. 23, 1996):

Principles for Successful Synagogue Change:

- The objective is results (not change activities)
 - Should provide a compelling benefit to the community
 - Should reflect high, but achievable, aspirations
 - Should be measurable
- Change needs to be inclusive and to integrate differing viewpoints
 - Leadership
 - Actual and potential members (bottom-up)
 - Lay and spiritual (cross-functional)
- Change process must embody the changed values and behaviors (e.g. listening, collective decision-making) ("The medium is the message"?)
- Change-readiness is essential prerequisite (distinction between "readiness" as prerequisite vs. a set of steps or procedures to prepare people for the next steps in the process a la KAB & ECE)
- Leadership must be committed to change effort
- Teams doing real work together are key instruments of change
- Approach should be based on learning (from each other) by doing
- Energy must be maintained through focus on the objective
 - Cut lower-priority activities
 - "Syndicate" the change mission
- Each change mission is unique: cookbook approaches don't work
- Skilled facilitation (internal or external) is very important

(Lisa add:
 self-reflection & continuous improvement of process:
 e.g.) learned in Year 1 that it was better to have the same facilitator work with synagogues throughout the year)

NY Continuity Commission -Grants Program

4 C's (how we got to what we're looking for re: selection criteria for grants)

(Hunches=Selection Criteria for giving grants):

4 C's:

- 1) clarity of vision (clear picture of what instit. will look like in 5 yrs.; it has to be best expressed by the lead professional)
- 2) widespread & deep commitment to change ("leadership curve": lead professional has to be at the head of that curve; when he's not, that's a prescription for disaster; the rabbi really has to lead it)
- 3) capacity to implement change
- 4) clear content of that change

(Criteria for receiving a grant:

We come down pretty strongly on the lead professional (rabbi) being the lead articulator of the vision, with the lay leaders' support of course.

We have a few cases of grants in school setting. We found, if rabbi is not solidly behind it, it's just going to be a school project & it won't turn the boat around (& this is one of our requirements for funding that it be a transformative program that turns the boat around for the syn. as a whole).

- "4 C's selection criteria=hunches/factors"

Is this tautological?

Since all institutions must meet these criteria, which are more likely to succeed? Are there other criteria?

- Some of obstacles for change internally (UJA) are same as those in the institutions

Partners for Synagogue Change (PSC)

- leadership is key:

- professional side: sr. rabbi who is thoughtful, reflective, not defensive, demanding involvement from others

(means or ends? a desired outcome in & of itself?)

- professional side: role of educator is critical for ECE ("We should have thought more about the changing role of the educator")

- lay commitment is critical ("I'm aware that there are people missing from the PSC Team, but maybe we'll add more as the visioning process progresses")

- patience and "willingness to stick with the process which is countercultural in most cases"

- spending time reflecting and synthesizing information before kicking off the process (Sara Lee spent 1 year before kicking off ECE; didn't do this for PSC)

- process: having a well thought out process

"It's no secret that ECE is a much better well-thought-out process than PSC.. Isa and Sara are steeped in organizational theory and thinking about congregations for awhile, so there's was a much more thoughtful process";

-process: ♂(Things that make ECE a "better process" than PSC):
a perfect balance of a carefully crafted process and "not much mandated in terms of how that process unfolds" in individual synagogues (what it means for individual congregations varies);
some general roadmap (process) + a lot of flexibility and tailoring to the needs of individual synagogues.

-process: "not yet ready to say that the only model for synagogue change is to have a dedicated advisor who is at each synagogue pm a regular if occasional basis (like ECE) for change to happen"... "but I sure think it helps"

-process: meetings for advisors of different synagogues to share notes and learn from each other ("this works tremendously well for ECE")

-process: making "change resources" available to synagogues

Philadelphia CAJE: Designated Schools Project

- "People working together in a coordinated and cooperating way makes all the difference"... "If you have the rabbi and other staff and lay leaders working together in the same direction, then you get synergy" (This seems to be a working assumption behind this project; not factors linked to change... Is synergy an "end" in & of itself, or is this a "means to an end",/ a factor linked to successful synagogue change?)
-"These are all just means to a goal. If everyone was just talking to each other, I wouldn't be happy. These are just sub-goals to the ultimate goal of educational change".

For these sub-goals to happen:

-need an outside objective facilitator (can't always see yourself clearly from within)
-need people who are committed to the process
-need commitment by participants that Jewish education is central (or else this kind of change won't happen)
-For real change to happen, you have to have the synagogue power centers' buy-in. The school alone is not a power center. The power of change is not within the purview of the Education Director.

Philadelphia CAJE: Designated Schools Project

"Successful change, from our experience, can't be judged from the outset. What we've learned is that "you never know" and surprises are the name of the game. That said,..
-There must be someone or someones who are meshuga ladavar-At the

outset, we assumed that the rabbi had to be meshuga ladavar but we learned tht he/she just had to be reasonably supportive. This is a question that I'd like to think more about.

Philadelphia Federation-"Friday Night Alive" & other Continuity Commission programs

- "the marketing has made it work": beautiful logo & beautiful published pieces ("People don't usually associate Judaism and beauty"): very accessible and contemporary brochures distributed everywhere (therapists offices, bookstores, not just Jewish venues) + big ads in the Jewish Exponent every month + article in the Enquirer (4/25/98) + other articles; graphics person at CMS coordinated all the publicity
- "critical mass": CMS had a built-in audience of 100 people who are their "groupies" who attend these "Friday Night Alive" services
- buy-in from lots of different communities: people who care and who bring their friends
- "It became a thing": The event got really talked about as a service that was warm, friendly, & created good feelings; It "feels good", so you come to the next service (Success breeds success?)
- the Siddur itself (There are millions of possibilities for Siddurs, just like for Haggadahs. Why do people make lots of Haggadahs, but yet there are only a few Siddurs?)
- "For a great idea to emerge, it needs to be able to break the pavement". "Change comes about through creative thinkers, not through bureaucratic structures" such as Federation and synagogue (where there is "so much weight on top")

(Is a bureaucratic structure or 'corporate' work environment conducive to change or antithetical to change?)

"Friday Night Alive"

- charismatic leadership: "They (Silberberg and Solomon) make things happen.. Nothing is too big or small for them"
- lay support and advocacy: lay leaders advocating for the program and "putting their money where their mouth is"

Synagogue 2000: Adrienne Bank's write-up Year One Report: A Change Theory-In-Use-October, 1997-5 components of Syn. 2000's change process that were "intended to create the conditions for synagogue transformation":

- 1) large gathering at Ojai for experiential learning, intellectual

seriousness, and emotional intensity

(Acc. to AB; "Ojai 96 was successful")

2) team approach where a core group of 3-5 individuals per synagogue experiences something personally meaningful and then returns home to organize similar experiences for 20-30 others

3) written Itineraries (Prayer and Healing)-instructional materials with agendas, process techniques, study materials, and resources

4) suggested change process-inc. visioning, planning, taking small actions ("low hanging fruit"), and evaluation: nature & sequence of the mix is left to each synagogue

5) variety of supports and communication devices (e.g. liaisons for each synagogue, administrative back-up on W. Coast and E. Coast; between-Conference get-togethers for clergy and liaisons)

culled from Adrienne's report-Re: factors linked to successful change:

-core groups at Ojai were able to infuse larger teams, providing them with leadership, guidance, and staying power

-"The role of the clergy proved critical to the process": extent of clergy members' participation and their actions strongly influenced the team.

-Itineraries provided the appropriate content, process suggestions, and resources to structure the team's study activities

Synagogue 2000

-need both exogenous (pushes) & endogenous (pulls) factors (pushes & pulls):

-exo: dissatisfaction

-exo: loss of \$ or something else

-exo: positive impetus for change:

e.g.) overwhelming growth in one area of membership

-endo: leadership capacity

-endo: motivation

-skill gap needs to be addressed: need training to enable synagogue professional and lay leaders to inspire others and "turn them on" to the Syn. 2000 vision

-difficult for lay people to make changes without rabbi supporting them

-rabbi needs to at least be on board & not obstructionist

-role of cantor-in an unspoken but imp. role; needs an enormous amount of study

-music turns out to be enormously important

-cantor has to understand the role of music for individual congregants & how they respond to music; not just for performance &

self-aggrandizement

(e.g.) ideal cantor/rabbi team at BJ: cantor choreographs the music)
(Are these factors linked to success or Syn. 2000's definition of success?)

Syn. 2000

- I'm absolutely convinced that you cannot do this without a very strong partnership between clergy & lay
- more rides on the strength of the clergy
- I think a great rabbi (visionary & broad thinker) can bring along a lay team,
but not the other way around

Syn. 2000

- role of rabbi & other clergy & staff
- partnerships between clergy & laity
- If you have a good product & a good vision, people don't worry about sponsorship re: Movements
- synagogues themselves need to be validated; outside change agent can't come in & say "We're the experts"
- team ("We're struggling with the notion of team with Whizin")

Whizin Institute

- need a charismatic individual to lead the change
- change is not theory driven, it best happens as a naturally occurring process (?? áhow is this a factor linked to successful syn. change?)
- even in changing an institution, there must be personal transformation for
the individuals involved

(Is this a statement about factors linked to institutional change (that you need individual change in order for instit. change to happen) or just a clarification of what's impt. as an objective for Whizin (not just instit. change, but indiv. change as well) ?

(mostly interested in indivi. change, not instit. change)

Karen Barth's Hunches

(from mailing received 5/1/98):

(1) Synagogue Readiness Qualities

- a secure rabbi (? self-assured, or low turnover/ been at synagogue for awhile & intending to stay?)
- a driving leader of the project
- no crisis
- some recognition of an opportunity or crisis (?is that incompatible with "no crisis" criterion?)♂-some experience with building broad-based support for change

(2) Process: Things That Help

- outside consultant: time & relationship
- outsider or insider has a powerful, compelling vision of a different type of institution: rooted in Jewish text & ideas
- interaction between:
 - a) study, reflection, vision and
 - b) trying, testing, building on success
- keep powerful people significantly involved
- rabbi at least supportive-sees it as consistent with his or her vision
- skills of professionals who have to implement
- reflective process
- medium is the message

(3) Process: Things That Hurt

- too much process
- lack of resources
- lack of content & ideas
- not Jewish enough
- focus on too small a part of the institution to make a major impact

(4) Typical Stumbling Blocks

- burnout
- professional resistance
- arena for playing out other tensions
- distractions

Karen Barth's Hunches

(from Change Think Tank handout 4/29/98):

"What We Believe About How Institutions Can Change"

"Comprehensive Institutional Change requires 6 things:"

(1) Leadership is the most important factor in bringing about institutional change but with the exception of the occasional genius) is not usually sufficient to bring about sweeping changes.

(2) Vision is the second most important factor. Vision cannot be created in a vacuum but must be supported by an "infrastructure of ideas".

(3) Cultural change must be part of any change program. Without a real shift in mind set, change will not be ambitious enough and is unlikely to stick

(4) An explicit change process is needed as a roadmap for turning vision into reality

(5) Skill-building is needed to support the new methodologies and approaches initiated by change programs

(6) Sufficient and appropriate funding is needed to support a change process at the institutional level

-Piecemeal changes in institutions do not work. The whole institution must change from the inside out.

- The time frame of change is longer than most change programs acknowledge up front.

Lisa Malik's Hunches based on Dissertation

(but note that dissertation was primarily focused on the institutionalization of one particular type of change-Jewish Family Education and the CIJE study is about institutional change in which the institution as a whole changes)

Institutional Pre-Requisites:

-need certain institutional 'pre-requisites' for change to be more likely to happen:

-business-like characteristics:

-marketing perspective

-vision

-organized/professional work atmosphere w. some 'corporate'-like elements

-learning organization (self-reflective)

-organizational values consistent with the desired outcomes of the change process

(e.g.) synagogue culture that values education and educational staff (if the change project is focused on Jewish education))

-perceived need for the particular changes in question (and for change in general)

Individuals & Relationships Between Individuals in the Organization

(some of which can be developed):

-"leadership" (but this term needs to be unpacked more):

-which leaders?: need multiple leaders on board, including professional and lay leaders with high informal authority

-leaders' characteristics/attributes: charismatic & facilitative leadership models

-leaders' skills

-leaders' relationships

-formal roles of lay and professional leaders ('organizational chart'):

role clarity or active attempts to achieve role clarity;

clear reporting relationships or striving for clarity

-informal lay/professional relations:

informal networks characterized by few cliques

, & amicability between/among lay & professional leaders

-nature of the lay leadership: active lay leadership in certain

respects: manifested by high board attendance, low board turnover, &

active lay committees when they are needed (not nec. in certain

staff-driven congregations that have financial resources to afford to

hire many high quality staff)

Characteristics of the Change Process

-change process characterized by "big ideas" and "small steps"

-deliberate attempts to incorporate the institutional changes, from within the organization (not imposed from outside)

Advocacy for the Change Project

-high visibility and awareness of the change project throughout the synagogue

(visibility & awareness could be reflected by such indicators as budget line-items, committees, a board that is comprised of people who are involved in the change project, etc.)

-advocates for the change project who have high informal status and influence

Factors that are 'Nice' but Not Necessary

-There are some factors that are 'nice to have' but not necessary for institutional change:

-rabbi, president, or education committee chair who is an active advocate for the change process and who is actively involved in the change process committee meetings

(Note: It is more important for the people with informal authority in the synagogue to buy-in than for the people with formal authority such as the president and committee chairs; The rabbi's advocacy is always good to have, but active advocacy is not necessary for institutionalization of change)

-absolute role clarity

-integration of the roles of lay leaders and professionals

-integration of the school and the synagogue (This may be desired as an end in and of itself, but it is not necessarily linked to successful change processes)

-overall active lay leadership in all domains ((e.g. volunteerism, program planning and implementation, attending or leading services)

-lay 'empowerment' as an organizational value

-size (There are some advantages of large synagogues and some advantages of small synagogues with respect to change processes)

Lisa Malik: Hunches culled from Literature Review

Aron & Zeldin 1996:

- 1) Readiness for change requires both a baseline of stability and a modicum of dissatisfaction with the current situation
- 2) Change must be rooted in tradition while focused on the future
- 3) Successful change is both planful and emergent
- 4) The institution's leaders must be able to inspire others, even as they are inspired by them
- 5) Change agents must take the long view while navigating the short term
- 6) Successful change requires both action and analysis (managing all of the balancing acts in #1-#5 by reflecting and being self-critical of process); (need at least one person on task force who is skilled at analysis and evaluation)

Critique: no empirical evidence; reflections on past Jewish ed. reforms

Berman & McLaughlin 1978: Rand change studies:

Factors affecting the continuation of changes in public schools are similar to those factors that affect implementation:

- project's scope
- resources (inc., money for staff development)
- methods
- school's organizational climate
- school's leadership
- attributes of teachers in the school
- district management's support

Creamer & Creamer 1988- deductive study-tested Probability of Adoption of Change (PAC) model developed by Davis and Salasin with higher education reform.

Key condition for change in student affairs at higher ed. institutions:

- existence of support at 3 levels:
- top-level support from the board
- leadership from the recognized project leader
- championship from an influential advocate

Critique: success of organizational change efforts defined by individuals involved in the change process, rather than by external standards.

Cuban 1992-case study of junior high school reform effort

Circumstances that are conducive to the slow institutionalization of

change:

- leadership
- resources (inc. staff time)
- parental awareness
- stable staff
- teacher understanding of the reform

Critique: public school reform; As Cuban himself points out, the junior high school has been institutionalized at the expense of meeting the reformers' goals for fundamental change. Institutionalization is not the same criteria for success as effectiveness or fidelity to reformers' objectives.

Curry 1992-

Factors linked to the institutionalization of innovations in higher education:

- the intensity and direction of support from organizational leaders
- the extent of communication and decision-making regarding the innovation's essential features
- the incorporation of the "dissident voice"

-Both the leadership position (with the power invested in that position) and the leader's demonstrated ability to influence others contribute to the institutionalization of innovations. The leader influences the institutionalization process by managing attention, meaning, trust, and self.

-"lateral relationships" between different higher ed. leaders, inc. relations between leaders in different depts. (admin, finance, academic svcs. , student svcs.

Critique: practical; anecdotal; lacks theoretical and empirical support

Fullan 1982:

Factors that influence implementation of educational innovations in public schools:

- 1) characteristics of the school district
- 2) characteristics of the school
- 3) characteristics of the innovation

Fullan 1991:

Factors that influence implementation of educational innovations in public schools:

1) external factors (inc. the govt.)

2) local characteristics (community, district, principal, teacher)

"One of the most powerful factors known to take its toll on continuation is staff and administrative turnover"

"in-service staff support" is essential, particularly for new staff members who arrive after the innovation was adopted

3) characteristics of the change

Critique: public school reform; institutionalization and continuation of innovations vs. institutional change; impressions and analysis of others' theoretical and empirical works; lumps together a variety of educational innovation; not sure what he means by "continuation" (e.g. some innovations might officially be 'continued' by the school or district, but not necessarily institutionalized)

Howes 1974-empirical quantitative study of multiunit elementary schools-

Organizational, individual, and innovation-specific factors linked to institutionalization:

-user-attitudes

-user's cost-benefit decisions

-use of communication channels

-open & supportive environments

-supportive services and resources

-flexibility of the change process

Critique: statistical significance, but what about practical significance? How to identify or create an 'open and supportive environment'? ; Correlation doesn't imply causality

Kenney & Roberts 1986-quantitative empirical study of voluntary school improvement innovations (Active Teaching, Mastery Learning, Student Team Learning, Teaching Variables) in Maryland's county school systems-regression analysis:

Factors that explain almost 50% of the variance in school institutionalization:

-behaviors of administrative leaders that demonstrate interest and commitment to the innovation

-coordinated communication across hierarchical levels for program review

-increase in teachers' knowledge and skill

-improvement in students' knowledge and attitudes

Administrative support is the strongest predictor of institutionalization of innovations (including "affective" and "logistical" behaviors of leaders)

Kirst & Meister 1985-historical analysis of educational reforms in American secondary schools

Reforms that lasted possessed 3 characteristics:

- 1) new structures
- 2) powerful constituencies
- 3) evidence of compliance

Critique: just interested in longevity of innovations, not quality or other indicators of successful change

Levine 1980-empirical study of different innovations in one higher ed. institution (SUNY Buffalo):

The extent to which an innovation will be institutionalized depends on the profitability and compatibility of the innovation with the organization ("institutionalization-termination model")

Miles 1978-empirical study of urban high schools.

Five factors associated with implementation of innovations in these schools:

- vision-building
- evolutionary planning & development
- initiative-taking & empowerment
- resource and assistance mobilization
- problem-coping

Critique: public school reform vs. Jewish ed context; implementation of educational innovations vs. institutional change in general

Miles 1983-DESSI (Dissemination Efforts Supporting School Improvement) study. Several organizational factors supporting the "built-in-ness" of innovations in public schools:

- elimination of competing practices
- establishment of routines for the maintenance of the innovation
- survival of the innovation in the face of budget cycles & new personnel

Critique: some of factors seem to be indicators of institutionalization rather than contributing factors or causes of institutionalization; only gives organizational characteristics; does not include attributes of individuals or individuals relationships within the organization

Miles & Ekholm 1991-empirical qualitative study of public school reforms.

Factors necessary to institutionalize innovations in schools:

- characteristics related to the innovation
- a sense of ownership of the innovation among administrators and teachers
- the embedding of innovation-related structures and procedures in the organization
- internal support for the innovation within the school
- external support for the innovation
- policy-level confirmation of the innovation (at local, district, and state levels)

- characteristics & actions of individuals
- the school leader's attention to the institutionalization of the innovation

"The institutionalization of a change is more likely to occur if there is a school leader who develops specific activities directed at maintaining the innovation" (p.9)

- characteristics of organizations
- activities that support vision-building

Schaffler 1987-empirical study of innovations in Jewish ed in America: Most Jewish ed. innovations have come from volunteer leaders, not professionals

Critique: study not just focused on synagogues; methodological flaw: Because S. only studied innovations that required additional funding, it is not surprising that volunteer leaders initiated or supported most of these innovations since lay leaders are generally the ones who fund new projects.

Shevitz 1993, 1995:

"Enabling Characteristics":

- flexibility
- willingness to learn
- history of experimentation
- stability & harmony of key professional and lay leaders

Critique: no empirical evidence;

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May 26, 1998

Ms. Karen Barth
CIJE
15 East 26 Street
New York, New York 10010

Dear Karen:

I hope this letter finds you well. Thank you for the opportunity to attend the conference on Vital Congregations on behalf of the CIJE. Significant change cannot happen within Jewish afternoon school and other congregational education programs without managing change in the parent congregation. I certainly see that as I introduce educational innovations here in Columbia. I was able to immediately utilize some of the lessons from the conference into planning for our revitalized Hebrew High School.

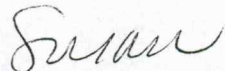
I am including an invoice, along with copies of my receipts, and a report on the conference, including a packet of the conference handouts as you requested. Please do not hesitate to contact me if you have any questions.

I look forward to other opportunities to work with you and share in building a revisioning of our community and the potentials of our people.

Warmest regards to Nessa, and of course to Sammi and Yishai.

My best for a truly revelatory Shavuot.

B'Shalom,



Rabbi Susan Grossman

Encl.

Vital, Vibrant, Visionary Congregations

a conference sponsored by the Rabbinical Assembly at Jewish Theological Seminary, May 5/6, 1998
facilitated by Rabbi Elliot Schoenberg and Suzanne Stier

Report by Rabbi Susan Grossman, conference participant

Conference Goals:

- 1) To provide theoretical and practical overview of how complex congregational life is.
- 2) Develop a brief (and therefore useable) tool to assess synagogue culture and the strengths and weaknesses of congregational resources for the support of and resistance to change.
- 3) Identify principles and strategies unique to synagogues (distinct from business applications of change management).
- 4) Identify strategies for successful innovation within the congregation based on an assessment of that synagogue's culture.

The material covered focused largely on these steps for successful change management.

- I. Do Your homework:
 - II. Make case:
 - III. Establish norms (what can expect in the process)
 - A. provide for adequate planning and implementation
 - B. make it fun, do it with enthusiasm
 - IV. Identify and involve stakeholders
 - V. Embrace the resistance
-
- I. Do Your Homework:
 - A. To do change well, the community needs to know
 1. Who we are
 2. Are we prioritizing well so we make the right changes
 3. Do we know the consequences of what we are seeking so we can predict the resistance and be better prepared for it.
 - a. Resistance represents loss. There is no change without pain, even if the change is positive. Often a community will change because either it is in pain or because the community is enlightened (continual improvement)
 - B. Know the community by Assessing Congregational Culture: The way things are done here.
 1. Culture exists in the beliefs, language, behavior of the community.
 2. It includes the shared history transmitted through stories of defining moments. (I call these the myths that encapsulate communal values, beliefs and self-definition.)
 - a. Culture can also be represented through the community's symbols and how they are understood through the explanatory stories that surround those symbols (art, memorial plaques, the building itself, etc.)
 3. Assessment Tool: adapted from the new edition of *Handbook for Congregational Studies*, ed. Jackson Carroll, Jack Wertheimer, et. al. (See accompanying sheet: Cultural Window) Definition of terms:
 - a. Program: what do we do (events and programming)

- (1) include artifacts (symbols, Holocaust memorials, historic items, etc.)
 - b. Context: what community surrounds congregation, including tone setting institutions (e.g. colleges), population served, area boundaries, neighborhood characteristics.
 - c. Identity: What is important and why to this congregation (values), e.g. We are egalitarian.
 - d. Process: How decisions are made, how do people communicate, how is conflict resolved.
 - e. Tacit Assumptions: What are the pieces everyone knows about but no one talks about.
- C. ✓Before introducing a new program ask:
- 1. What questions should be asked?
 - 2. Who will be affected? (Target)
 - 3. What resistance can be expected?
 - a. Who will be the biggest critic?
 - b. How resistant is the community? If the change is too threatening, the change will not happen.
 - c. What is the worst that can happen?
 - 4. Who should be involved in planning? (Process)
 - a. Seed the idea so others buy in.
 - (1) Ask others: what is the best way to do this?
 - 5. Who announces it?
 - 6. When should this take place? (Pace)
 - 7. Do a cultural assessment (“cultural window form”) and then go over it with others, asking: this is what I came up with, what do you think?
 - a. Remember there are many subcultures within a larger culture.
 - b. A change in any subculture will affect the rest of the community.
 - c. A community’s values are behavioral values (what one does) not espoused values (what one says). Therefore , we might hear a commitment to education but see a cut in the education budget.
 - 8. Gather data:
 - a. What is the history? How was change managed in the past? (Understanding this will help in framing this change better.)
 - 9. Articulate what will change and what will remain the same. (I.e.establishing norms)
- D. Ideally enough homework will have been done so there are no surprises.

II. Make a Case:

- A. Articulate clearly the reason for the change in ways that respond to WIIFM: what’s in it for me (people’s self-interest).
- B. To be successful, one needs:
 - 1. Strong leadership: Rabbi and President (lay leader)
 - 2. Understanding of the past (what one is leaving)
 - 3. Strong faith that we can make the vision a reality.
- C. Determine what is inventive and what is not.

- D. How to become a visionary community. Jill Janov identifies the qualities of "The Inventive Organization:"
1. Continually questions its assumptions. Revitalizing is a continual process that should be done when things are good.
 2. Focuses on how something is used not just on what it was designed for. Example: sticky notes were first designed for secretaries but then marketed for use for other purposes.
 3. Knows when to remove a service.
 - a. Whenever a new program is added, an old program must be deleted to preserve resources or moved to a new resource (e.g. an additional staff member)
 4. Learns how it learns about itself and what it wants.
 5. Has a dream, a compelling vision of what we will be doing when we are successful.
 - a. Should elicit: when I read this/hear this, I want to join
 - b. The vision statement is a one paragraph description of the desirable future written in the present tense.
 - c. The vision statement should stretch us beyond our comfort zone.
 - d. The vision statement becomes the place to bounce off and prioritize experimentation.: i.e. How does this fit with where we want to be?
 - e. Different than a mission statement which is what we are doing now.
 - (1) A mission statement asks the following questions:
 - (a) who are we?
 - i) is that who we want to be?
 - ii) what are the values you want this institution to live by?
 - (b) What is our "business"?
 - i) How do we do the values identified above
 - ii) What are the synagogue blasphemies (what can't talk about)
 - (c) How do we get it done (strategy)
 6. Encourages experimentation: rewards risk taking by creating small experiments
 - a. Every year there should be one significant piece of the overall synagogue program that the Rabbi is excited about.
 7. Provides the unexpected
 8. Responds flexibly to the environment
 9. Encourages the talent of everyone in the organization
- E. The Rabbi should be the shadow consultant to the lay leadership, not out there presenting the change to the community.

III. Systems approach: (different from family systems): the system is perceived as a whole without cause or effect. There is no one to blame. Rather the system functions as a whole in response to many stimuli and variables and always seeks stasis.

- A. Ask: what factors are involved in creating this situation? (Should be several factors).
1. A systems approach does not look at the power or influence of any one individual. The whole is more than the parts.

- B. System wants stasis.
 1. Resistance is not by the individual as much as a system's way of staying the same
- C. Example: A systems approach to membership growth:

1. Good children's programming

4. Attracting new members

2. Satisfied kids

3. Satisfied parents

1. Following this systems model, more time and money should be spent on programming than on open houses or advertising. Use of Rabbi's time is more effectively applied to a quality program than in an open house.

- D. Change small things, using them as a lever to tweak entire system.

1. Move slowly.
 2. Dealing with resistance and complaints: Do not go around person being complained about. First send complainer back to source of complaint.
 a. use active listening.
 3. Be careful not to position congregation as a product to sell membership but remain focused on overall quality of programs.

IV. Lay- Rabbinic Relations:

- A. When a new President begins, the Rabbi and President should discuss:

1. What does the President want to accomplish?
 2. How does that build upon what the former President did (so can seed continuity)?

- B. Lay-Professional Relations by congregational size (number of active congregants).

1. Resource: Roy Oswald "How to Minister Effectively in Family, Pastoral, Program, and Corporate Sized Churches" (Action Information, published by Alban Institute)

a. Family Congregations have up to 50 active members, are organized around a matriarch and patriarch and have loyalty to the congregation. The Rabbi serves as consultant and facilitator.

b. Pastoral Congregations have 50-150 active congregants, are organized around loyalty to the rabbi and the Rabbi serves as center of attention serving the pastoral needs of the congregation.

c. Program Congregation has 150-350 active congregants who are organized into independent groups and various constituencies and the Rabbi serves as the glue between the groups. Pastoral work must be shared with program support committees (e.g.. Visiting the sick)

d. Corporate Congregations are 350 and more active congregations organized around a triumvirate of Rabbi, Staff and Board who oversee the operations of the organization. There is little opportunity for congregant-

Rabbi contact among the laity. Role clarity (who is responsible for what) is extremely important here.

2. One big factor in successfully managing growth (change) is for the Board and the Rabbi to be willing to shift the role of the Rabbi, reducing the Rabbi's role in areas that served the smaller size community to allow for moving into the new roles.
 - a. For everything that is added remember to reduce something to remain in balance.
3. Every year, the synagogue board and Rabbi can set communal goals and priorities that, at the end of the year, can be assessed. (This is not a personnel review but an entire community priority and performance review, like a medical check up of the entire system, rather than something designed to point blame.)

C. Timing of Change is Everything

- a. ✓RULE OF THUMB: ONE CHANGE PER SIX MONTH PERIOD in a congregation
 - (1) Let the congregation know that we will be moving slowly
- b. Change within a congregation is slower than in other organizations
 - (1) change is not unilateral, one needs partners and allies
 - (2) planning in synagogue culture is often not an esteemed value.
 - (3) most effective plans are short term, not five year plans.
 - (4) If a strategic plan is proposed, the process is most important because it involves people and teaches them how to think through ramifications
 - (5) Any strategic plan has to be seen as a tool that is flexible and will be changed and adapted as time goes on.

V. Identify and Involve shareholders:

A. Change Agents (those involved in change):

1. Sponsor: who is endorsing this idea
 - a. influential members in the synagogue
 - b. those with vested interest in this area
2. Agent: who is the person leading the change
 - a. Rabbi
 - b. President
 - c. School Chair
 - d. Committee Chair
 - e. Other
3. Target: who is the recipient of the change:
 - a. Identify the different subgroups that will be affected.
4. Advocate: who is in favor of the change but does not have the power to implement the change.
 - (1) Identify individuals
5. Resisters: who objects to the change:
 - (1) identify individuals.
 - (2) find out what they think they are losing

- (a) embrace the resistance through
 - i) active listening
 - ii) maintaining relationship

B. How we spend our time: Len Hirsch has written about the bell curve shown in studies of how we allocate our time resources in interpersonal contact: Hirsch found that most people spend the majority of their time between the 10% of the population who are actively supportive and the 10% who are actively antagonistic and only a small fraction of their time with the 80% of the people in the middle. He constructs a bell curve:

	Supportive	Neutral	Antagonistic
		80%	
	10%		10%
Time Spent:	40%	20%	40%

However this is how we should be spending our time for maximum effectiveness:

	Supportive	Neutral	Antagonistic
		80%	
	10%		10%
Time Spent:	10%	80%	10%

V EMBRACE THE RESISTANCE

1. Utilize active listening
2. Those resisting have valuable contributions to make to the whole idea. See their resistance as constructive critique and weigh how their concerns can be used to strengthen planning for the change. (Polarity theory)
3. Remain in relationship

VI. Resources for Change:

4. The Fifth Discipline - Peter Senge
5. Managing at the Speed of Change - Donald Conner
6. Strategic Planning for Public and Non profit Organizations - John Bryon
7. Leadership and the New Science - Margaret Wheatley
8. Beyond the Wall of Resistance - Richard Maurer
9. Strategies for Change - Lyle Schaller
10. How Your Church Family Works - Peter Steinke



The Rabbinical Assembly • כנסת הרבנים

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6 April 1998

י' ניסן תשנ"ח

Dear Workshop Participant,

Welcome to our two day workshop on Vital Congregations. We are delighted that you are joining us for this special two day program. We expect it to be a wonderful interactive learning experience for the participants (and facilitators, too). Our goal for these two days is identify tools, to assess congregational culture and structure, to learn the best practices of change management and discover ways to vitalize congregations. Enclosed please find the proposed schedule for our time together. We will start at 10:00 A.M. on the first day of the Conference, May 5th.

However, to get the most benefit out of our two days together, we have enclosed several articles for you to read before we meet.

- A) Excerpts from *The Fifth Discipline* by Peter Senge (reprinted with permission of the publisher);
- B) *How to Minister Effectively in Family Pastoral Program and Corporate Size Churches* by Roy Oswald (reprinted with permission of the publisher); and
- C) *Twelve Principles of Organizational Transformation* by Richard Koonce (reprinted with permission of the publisher).

These three articles lay the foundation for our learning experience together.

Each participant is also asked to bring a one page statement presenting a change issue in your setting that the group will discuss and analyze together. This situation would be one that the rabbi would like to change and that the group will consult and work on together.

We look forward to meeting you personally. Best wishes for a חג כשר ושמח.

Sincerely,

Dr. Suzanne Stier

Rabbi Elliot Salo Schoenberg

Enclosures

Vital Congregations

Goals: To identify tools to assess congregational culture and structure, to learn “best practices” of change management, to discover ways to vitalize congregations and to apply systems thinking theory to congregational life.

Day I - May 5, 1998

10:00 A.M.	Coffee/Welcome
10:30 A.M. - 11:00 A.M.	Opening Exercise
11:00 A.M. - 12:30 P.M.	Assessment of your Institution's Strengths
12:30 P.M. - 1:30 P.M.	Lunch
1:30 P.M. - 3:30 P.M.	Systems Thinking - How to Use this Leverage
3:30 P.M. - 4:00 P.M.	Break /Minhah
4:00 P.M. - 6:00 P.M.	Building Lay-Professional Relationships

Day II - May 6, 1998

8:30 A.M. - 10:00 A.M.	“Best Practices” of Change Management
10:00 A.M. - 11:30 A.M.	Vision
11:30 P.M. - 12:30 P.M.	Individual Case Consultation
12:30 P.M. - 1:30 P.M.	Lunch and Minhah
1: 30 P.M. - 3:00 P.M.	Individual Case Consultation, cont'd. Key Trends of Innovation Plus Individual Case Consultation
	Action Plan & Wrap-Up

P.S. Each participant is asked to bring a one page statement of a situation that the Rabbi would like to change. Small groups will facilitate discussions of these statements.

Cultural Window

	Program		Identity	
Events	1.		1.	Symbol
Artifacts	2.		2.	Values
Programs	3.		3.	Why
	Context		Process	
Boundaries made	1.		1.	How are <i>decisions made</i>
Anchor Institutions	2.		2.	Who makes them
Populations	3.		3.	Comments about communication
Neighborhoods				Comments about leadership
				How is conflict resolved
		Tacit Assumptions		
		1.		
		2.		
		3.		

Discovering Synagogue Culture

The classic study on organizational culture is Edgar H. Schein's *Organizational Culture and Leadership*. According to Schein, culture includes each of the following, but is deeper than any one of them: (1) *the observed behavioral regularities* in a group (for example, people do not pray out loud in groups in our synagogue, and they will be embarrassed if you ask them to); (2) *the dominant values* of the group (for example, synagogue attendance is the ultimate expression of spirituality); (3) *the rules or "ropes"* of the group (for example, the usual way to become a member of the board is to serve several years on the finance committee); and (4) *the feeling or climate* that is conveyed (for example, it is also not acceptable to raise one's hands in the middle of services).

Program: Those organizational structures, plans and activities through which a congregation expresses its goals and purpose both to its own members and those outside the membership. Program is the "face" of the congregation both in official self-representation of congregation and to the outside world. It is the "what" of congregational life, e.g. annual reports, articles in the newspaper. Congregations often seem to fight over program.

Process: Has to do with the underlying flow and dynamics of a congregation that knit together in its common life and affect its morale and climate. The "how" of members relationships with one another. How leadership is exercised and shaped, how decisions are made, how communication is done, how problems are solved and conflicts managed. It is evidenced in the way members treat each other, in the agreements they make to maintain the coherence of the body and to nurture its growth. Unlike program, it is most likely to be hidden from view.

Social Context: Context refers to the setting, local and global, in which a congregation finds itself and to which it responds, e.g. demography, neighborhood. It is an open system - congregations affect their environments and congregations are shaped by their environment. Included in context are people, their culture and characteristics, institutions and social groups and the various social, political and economic forces operative in the setting.

Identity: Persistent set of values, patterns, symbols, stories and style that makes a congregation distinctively itself. Identity is another hidden face of the congregation - lodged in gossip, in unwritten rules and in tacit signs. The components of identity are more often stumbled upon than codified. Identity explores the individuality of a congregation that distinguishes it from its conditioning environment.

Summarized from "Handbook for Congregation Studies" edited by Jackson Carroll, Carl Dudley, William McKinney

STIER ASSOCIATES

ORGANIZATION CHANGE

1. Today companies compete through their values as well as their products. Customers want to know what a company stands for.
2. A company's reputation for good human values is as valuable an asset as capital investment
3. The biggest obstacle to corporate change is the reluctance of leaders to see the need for it.
4. Manage disparate talents to achieve common goals enhances company creativity.

TEN GUIDLINES FOR MANAGING CHANGE

1. Clarify your motivation...be clear about what change you want and why you want it
2. Clarify your vision...what is your picture of the change "Let's create an environment where everyone will do their best work"
3. Expand your focus...keys to success are individual ability plus a corporate destination.
4. Audit your Corporate culture...look at what your present culture looks like...what is the body of unspoken and unexamined assumptions, values, and mythologies that make your world go round...This should be done with outside help as a research activity...done mostly with in-depth interviews and a lot of listening at the water cooler...Check on the operative corporate assumptions....Corporate culture is a kind of tree. Its roots are assumptions about the company and the world. Its branches, leaves and seeds are behavior. You can't change the leaves without changing the roots, and you can't grow peaches on an oak. Or rather, with the proper grafting, you can grow peaches on an oak, but they come out an awful lot like acorns - small and hard and not much fun to eat.
5. Modify your assumptions...the real problem with this corporate culture tree is that every time you go to make changes in the roots, you run into terrible opposition. Every culture, including corporate culture, has root guards that turn out in force every time you threaten a basic assumption.

6. Modify your systems. The first purpose of examining and modifying assumptions is to modify systems. Promotion, mentoring, and sponsorship is one such system. Performance appraisal is another system. Compensation is another...
7. Modify your models. The second purpose of modifying assumptions is to modify models of managerial and employee behavior.
8. Help your people pioneer...managing change is difficult, and there will be many mistakes. The managers involved are change agents...middle managers need help, and a certain amount of sympathy...they need to be told that they are pioneers and judged accordingly.

Adopted from R. Roosevelt Thomas, Jr. by Suzanne Stier

VISION

Visions are powerful mental images of what we want to create in the future. They are rooted in and reflect what we care about most. They are in harmony with our values and sense of purpose.

Visions are the product of both head work and heart work. As such, a vision is more than a mental image and visioning is more than a mental process. It speaks to our inner being.

Visions take into account the present and they focus on the future. Visions help us explore possibilities and create desired futures. While a vision is a statement directed toward the future, it is experienced in the present.

By holding a picture of the present situation beside a picture of the desired future, we create the tension that moves us toward the vision. Without an ongoing awareness of what today is like, visions become powerless.

Another way to say this is that the visioning process creates a field in which the pull is away from what is toward the desired outcome. The magnetism of a vision is generated from an integration of an individual's and organization's sense of purpose, values, uniqueness, and interaction of mind, body, and spirit.

Visions represent our deepest desires of what we want to create. They are compelling and provide an over-arching framework which guides us in making choices. By following the map we create by the vision, we turn it into reality.

A shared vision and mission brings diverse people together. They provide links that unite people as they work together and is an expression of what they have in common. People who share the values that go into making up a vision and a mission are more likely to take responsibility for what they choose to do.

A shared vision represents the family's, group's, organization's core purpose or essence. An organization that is tied to their core purpose or essence is more powerful, command more commitment from employees and can accomplish more in a continually changing environment.

Change and Resistance

I. Dissatisfaction X Vision X First Steps

_____ = successful change
Resistance

(Richard Beckhand Model)

Points:

- 1) Shared dissatisfaction most important part of equation
- 2) Equation that reads times - if any factor at zero
resistance will take over
- 3) We all have our own pattern to avoid resistance
- 4) When are you ready
 - a) critical mass
 - b) key players
 - c) the timing is right
 - d) cultural fit
 - e) read history
 - f) change agents tend to see the positive results and minimize the risks

II. Dissatisfaction X Vision X First steps

X sensitivity to potential resistance = successful change

_____ Resistance

(Rick Maurer Model)

“Beyond the Wall of Resistance”

CHARACTERISTICS OF A "GOOD" VISION

1. CAPTIVATES PEOPLE'S IMAGINATION
2. ALIGNED WITH THE PERSONAL VALUES OF THE SUPPORTERS
3. APPEALS TO LOFTY CHARACTERISTICS, AND IS OBTAINABLE
4. IS VALUE ORIENTED
5. OFTEN USES SYMBOLS (WORDS EVOKE AND ARE POWERFUL TO THE EXTENT THEY CREATE A SYMBOL OR IMAGE IN THE MIND)
6. ACCOMPLISHING THE VISION WOULD ALLOW THE SUPPORTERS TO DEFINE THEIR LIVES AS HAVING MORE MEANING AND VALUE
7. A "GOOD" VISION WILL ANSWER THE QUESTIONS:
WHERE ARE WE GOING? (WHERE AM I GOING?)
HOW WILL WE GET THERE? (HOW WILL I GET THERE?)
WHO WILL WE BE WHEN WE GET THERE? (WHO WILL I BE WHEN I GET THERE?)
WILL WE FEEL GOOD ABOUT OURSELF DURING THE JOURNEY? (WILL I FEEL GOOD ABOUT MYSELF DURING THE JOURNEY?)
8. THE VISION STATEMENT IS WRITTEN IN THE PRESENT TENSE .

MOST PEOPLE ARE ASKING THESE QUESTIONS, EVEN IF UNCONSCIOUSLY. THE PROCESS OF DISCOVERING THE ANSWERS IS AS IMPORTANT AS THE ANSWERS THEMSELVES.

dr. suzanne stier

ACTION PLANNING

1. Things we need to continue doing.
2. Things we need to stop doing.
3. Things we need to start doing.
4. Our first project should be.
5. When should we start it.
6. Who should be involved.
7. We will know we have been successful when.

NOTES

EFFECTIVE BOARD MEMBERS ARE:

COMMITTED: Members are personally dedicated to the clients, the work of the agency and its vision for the future.

INVOLVED: In addition to attending meetings, effective Board members lend their skills, expertise and talents to the agency through committees and special projects. They work in partnership with the staff to effect positive change.

INFORMED: Board members educate themselves about the work of the agency, fiduciary matters, policies and procedures and their positions.

CLEAR ABOUT EXPECTATIONS: They understand what is expected of them and express their expectations of the staff on a regular basis.

CHALLENGED: In addition to lending their expertise, effective Board members seek to learn new skills and work in different areas of agency governance.

TRAINED: Staff and current Board members conduct orientation programs which provide knowledge about the agency as well as the important role of the Board.

HELD ACCOUNTABLE: Members understand the importance of attending meetings and making promises; those who cannot maintain that level of commitment are asked to work on advisory committees or councils.

Feedback Form

Evaluation

1. The three most important learnings I take from this program:

- A.
- B.
- C.

2. What were your personal goals for this program?

3. How well were they met?

Exceeded
Expectations

Met
Expectations

Not Meet
Espectations

4. Comments about presentation and presenters.

5. Comments about breaks, pacing, format, etc.

6. What issues would you like to address at future workshops?

7. If you would change one thing about this conference, what would it be?

8. Additional Comments (use other side)

Please return to Rabbi Elliot Salo Schoenberg, The Rabbinical Assembly, 3080 Broadway,
New York, NY 10027.

DND

April 27, 1998

TO: Change Think Tank Participants
FROM: Daniel Pekarsky
RE: Materials for our upcoming meeting

Though it may not be possible to review all of these additional meetings prior to our meeting, I am including them in the event that you are able to find the time. In addition to the short piece ("Some Building Blocks....") which I had promised to prepare, I am also enclosing the following:

1. Two short pieces prepared by Deborah Ball and David Cohen in preparation for a CIJE consultation on change that was held last year.
2. The proceedings of two CIJE meetings dealing with change-related issues (one of them a CIJE/Mandel Institute meeting with Israel Scheffler held over two years ago, and the second a meeting of the GUIDES group in Providence last summer.) These pieces identify varied issues and concerns that have entered into some of our deliberations.

In deciding what to read, it may relevant to keep in mind note that as a way of focusing our attention on Wednesday morning, we will probably use the short "Building Blocks" piece as a springboard to discussion.

See you soon.

Dan Pekarsky

GUIDES SEMINAR
Providence, 7/28/97

BACKGROUND

Part of the rationale for the CIJE/Mandel Institute Goals Seminar, organized in cooperation with CAPE in July of 1996, was the need to develop a cadre of talented individuals with the capacity to forward the educational agenda associated with the Goals Project. With this mind, a sub-group of the larger group that had met in Jerusalem was convened in December of 1996 to examine a case-in-progress presented by Dan Pekarsky. The group was convened a second time in July of 1997 in Providence, Rhode Island: this time, the group's work was defined by a twofold agenda: a) reflection on a project that, as a result of his work in the Goals Seminar, Alvan Kaunfer has taken on in Rhode Island; and b) the need to think through how this group of individuals might most fruitfully operate as a group and contribute to the work of CIJE and the Goals Project.

Attending the meeting were Karen Barth, Amy Gerstein, Alvan Kaunfer, Daniel Pekarsky, Nessa Rapoport, and Linda Thall. Invited but unable to come was David Purpel, who had recently participated in CIJE's Professors Seminar.

CONSIDERING AHAD HA AM'S MOSES

Our work began with a study session organized around Ahad Ha'Am's essay entitled "Moses". In introducing the session, Dan emphasized that our engagement in Jewish study should not be regarded as ritualistic or as incidental to the work that brings us together; for it has the potential to facilitate our creating a kind of learning community amongst us that will contribute to our more task-oriented conversations, as well as to introduce concepts, insights, and questions that will shed light on our discussion of critical educational issues.

Led by Alvan, this discussion focused primarily on Ahad Ha Am's characterization of the Prophet (in the person of Moses) as leader, a characterization that emphasized 1) the Prophet's identity as a person of truth, 2) his extremism on behalf of his vision: his wholehearted and uncompromising dedication to a vision, carried deep within his soul, of what ought to be and must be; and 3) the Prophet's need of a priestly figure -- an Aaron, a person of words -- to mediate between himself as bearer of the vision and the the situation down on the ground. For the very same characteristics that render the Prophet prophetic in the sense specified in 1) and 2) render him less adept at interpreting and adapting to the needs of the moment.

Our discussion of this article brought out on a number of

themes, identified below.

'Truthfulness'. The Prophet is a person of truth in a double-sense. It's not just that he or she sees things as they are, unbiased by subjective feeling, but also that he/she cannot but speak the truth (as he/she sees it) to others (and even to God). It is this inability or unwillingness to tailor his/her presentation of the truth to the audience and the context that necessitates the partnership with the Priest, who is described as "a man of words."

But what does it mean for the Prophet to see things as they are? Two (not necessarily incompatible) views were articulated. On one interpretation to see things as they really are is to be brutally honest with oneself (and others) about what one sees, not letting one's fantasies, fears, hopes, or just lazy thinking contaminate one's assessment of the situation in which we find ourselves. In this context, reference was made to Senge's insistence that efforts to bridge the distance between what is and the vision to which we aspire depend on a willingness to carefully and dispassionately study what he calls 'current reality' [To cite an example from out of our later discussion, in looking at the relationship between the vision a community articulates and existing social and educational arrangements, the Prophet type is the one who does not let us get away with facile efforts to see the vision as already embodied in the present, when in fact it is not; any such claim, this figure insists, needs to be grounded in strong evidence.]

On a second interpretation, "to see things as they are" is not only a matter of being dispassionate but of seeing things as illuminated by the vision, a vision which offers one insight into the present which is otherwise unattainable. Thus, the vision functions as a kind of lens through which the present situation and the challenges of the community are interpreted. This interpretation was accompanied by the suggestion that the first one seems to assume that it is possible to see current reality unencumbered by what the observer brings, and this led to some discussion of the following point: granted that the observer's understandings and commitments inevitably enter into what he/she sees, can't one nonetheless meaningfully distinguish (as interpretation #1 insists) between seeing things in a distorted and in an undistorted way?

Prophet and priest. There was considerable interest in the idea that the challenges of leadership require two different "types", both Prophet and Priest, and there was some discussion of how best to understand their relationship in the process of a community's growth. Does a community need different types at different stages in its development? Do they represent two dimensions of leadership that are constantly in interaction? Should we understand Prophet and Priest as two different roles in

the life of a community -- or, as one member of the group suggested, should we understand Prophet and Priest psychologically, as elements of the Self found within the leader?

In any event, there seemed to be agreement that both leadership elements were important to a community's growth -- that the visionary without the capacity to adapt the vision to the needs of the moment risked being too out of touch with the community to be able to guide its development, and that the Priestly type who is always attentive to the mood and desires of the people being addressed is in danger of losing a meaningful connection to the kind of larger vision that the Prophet represents.

Two kinds of genius? There was in this context a challenge to what some felt to be an explicit or implicit hierarchy in Ahad-Ha'am's outlook: the Prophet is the genius, the Priest is the (mere) implementer. It was suggested that the priest is also a genius -- a genius of implementation. To this it was added that it is inaccurate to describe the work of the priest as a "watering down" of the vision (compromising it) in the face of a recalcitrant reality; rather, implementation can be understood as an imaginative interpretation of vision that takes into account not just the vision but the situation in which it is to be embedded. [It is, of course, possible to acknowledge both possibilities -- that is, that in the process of implementation, visions are sometimes but not always or inevitably interpreted in 'watered down' ways. How to draw this distinction may be worth exploring.]

The problem of 'readiness'. Although time-constraints precluded serious discussion, our conversation pointed to a second dimension of the Ahad Ha-Am essay that is relevant to efforts to encourage transformational change in an institution (or community, or individual) -- namely, the problem of readiness for change. Here we took note of Ahad Ha-Am's discussion of the traditional view that the Israelites that had come out of Egypt were not ready to wholeheartedly commit themselves to and embody the vision that was put before them: neither the experience of great miracles leaving Egypt, nor powerful moments at the foot of Mount Sinai, nor even efforts at "training and education" seemed capable of overcoming in an enduring way the outlook and the values acquired as slaves in Egypt. Hence the need for the forty years in the desert, for a generation that had not known slavery. There is a sense in which "Moses" offers a pessimistic view of the ability of a group of people to transcend the outlook or culture within which they have been raised; hence the need to cultivate a new generation -- or to turn one's back on pathological existing institutions and try to create new ones.

THE PROVIDENCE CASE

Relationship to the "Moses" article. Alvan pointed out some natural bridges between our discussion of the "Moses" essay and some of the central concerns growing out of his work with the Rhode Island Jewish community. Ahad Ha'Am's Moses exemplifies the kind of "vision with punch" described in his written case, a compelling vision that is typically the product of an individual who passionately represents it -- the kind of vision that may be sacrificed in the search for a consensus aimed at allowing everyone to feel included (Alvan's "consensus" issue). And Alvan's worries about connecting the vision as arrived at by his committee and ratified by the Federation with the one-going development of education in the community (his "connector" issue) are illuminated in significant ways by Ahad Ha'Am's discussion of the relationship and role of Prophet and Priest.

Alvan's formulation of some pertinent issues. Having identified the "consensus" and "connector" issues as the larger concerns that he hoped we would jointly illuminate on this occasion, Alvan went on to identify other - what he called sub-issues - that he hoped we would address. For example:

choice and pluralism: in relation to the "consensus/inclusivity" issue, he called our attention to the committee's struggle with whether and how much to incorporate the language of choice and pluralism in its statement of vision.

the problem of breadth: Is the kind of vision produced by the Providence community too broad to elicit enthusiasm and to meaningfully guide priority-setting and other facets of practice (as compared, say, with the more focused vision emphasizing Study and Social Justice articulated by Barry Schrage in Boston)?

Discussion of Alvan's case. There was high praise for Alvan's work and for his write-up of the work in the form of a case. The writing, the exercises he used with the committees he worked with, his success in drawing attention to significant issues pertaining to change efforts informed by powerful ideas -- all of these and other virtues of his work will render this case a very useful teaching and learning tool as we proceed with our work. Below is a summary of some of the major ideas that surfaced in response to participants' reading of the case and to Alvan's presentation.

1. How far does the vision have to go? A point that is of conceptual and potentially of practical significance is concerned with how we understand the scope of vision. A vision could be understood as referring to 1) the ideal outcomes of a Jewish education -- the kind of person and community we hope to cultivate. It could also be understood to refer to 2) the kinds of institutions necessitated by #1. Finally, it could extend

beyond 1) and 2) to the inclusion of 3) the kind of infrastructure needed to support and maintain the kinds of values and institutions identified in #s 1 and 2. [While #s 1 and 2 are discussed in DP's piece on vision in Jewish education, attention to #3 pushes that discussion to another level.] All three levels in their inter-relationship are important, and it is of interest to consider how attention to them should be woven into the overall process of envisioning and implementation. [Note that while #s 2 and 3 pertain to the implementation of the ideas envisioned in #1, they are not in themselves stages of implementation; they are closer to ideas about implementation (not unrelated to Seymour Fox's Level 3, or "theory of practice).]

2. The difficulty of maintaining a high energy level. Alvan's process was much more time-consuming than his group had realized it would be, and there may have been a problem of flagging energies along the way. It was suggested that perhaps a less linear approach, one that allowed participants to regularly wrestle with questions of practice and implementation long before

their vision had crystallized, might help sustain their energy; well-conceived, it might also help illuminate the developing vision.

3. How might external inputs enrich the process of deliberation, and how can they be incorporated in ways that will have this effect and not seem like a distraction from the work of the group? Raised early in the day, we began - but, alas only began - to explore this question more systematically towards the end of the day when we spent some time considering how Menachem Brinker might have approached the questions addressed by the Providence community, and how an encounter with ideas like his might have enriched the deliberations of the group that Alvan worked with. Some of the pertinent issues in need of further discussion are articulated later in this document.

4. What are the purposes of vision and how might attention to these purposes inform the design of the process of deliberation aimed at articulating a guiding vision? It was suggested that it is problematic to assume that there is only kind of a purpose that a vision can legitimately serve; depending on circumstances, it may meet very different kinds of needs. Among the purposes and needs that a vision might satisfy in the life of an educating community are the following:

- a) program/curriculum design and evaluation;
- b) resource allocation;
- c) strategic planning;

d) creating "a big tent" under which the varied members of a community feel they all have a place;

e) symbolic action: through the vision announcing to ourselves and/or others who we are and what we stand for.

Which of these is judged to be primary in a given situation may carry implications for the design of the process that leads to the vision.

5. How narrow or broad, small or large, should be the group that is involved in working towards the guiding vision? In the context of Alvan's case, a concern was raised about the narrowness of the group involved in crafting the vision that was to guide communal decision-making in education. It was suggested by one participant that the process of working towards the vision is often more important than the final product; and that for this reason it might have proved important to expand the circle of individuals involved in formulating the Rhode Island vision. It was suggested in this connection that it may not be too late to meaningfully engage significant additional constituencies in this process.

6. The tacit dimension: priorities and commitments embedded - and discoverable - in existing forms of practice and organization. It was suggested that as part of a community's efforts to discover or refine its guiding vision it may be of value to surface priorities, commitments, and compromises that are embedded in existing practice. It may, for example, be instructive to identify the value-commitments at work in an educating community's budget allocations or in a school's schedule. In the case of some such inquiries - for example, analysis of a schedule, the activity may be relatively unthreatening inasmuch as schedules tend to reflect long-standing practice rather than the ideology or idiosyncrasies of any particular individual or body. In any event, the tension between the commitments and priorities at work in existing practice, on the one hand, and those that a community affirms as central can catalyze significant progress at the levels of guiding vision and/or practice; it can facilitate testing an avowed vision (or a community's commitment to it) and can lead to thoughtful revision at the level of practice.

7. Avoiding self-deception or smugness: insisting on evidence and on the attitude of a trustworthy physician. It was suggested that in looking at the relationship between the avowed vision and existing practice, there may be a tendency in the direction of self-deception, a tendency "to see" the vision at work in practice even when the relationship between the two is at best tenuous. To counteract this tendency, it was urged that exercises aimed at discovering the commitments and values

Fox's discussion of "the five levels", which highlights the complex and textured character of the relationship between vision and practice.

11. The leader's vision...or discovering the community's vision, OR....

In our initial discussion, there was a tendency to contrast two different approaches to vision: either a charismatic leader (a Moses) brings a vision to the people or a skilled facilitator helps the community to identify its own shared vision. In the course of our conversation, some other ideas surfaced. It was suggested that one of the challenges and tasks of a community's guide is to find a language through which to articulate this community's heretofore inarticulable understandings and values. Since these understandings and values can probably be articulated in more than one way, the guide's responsibility (for choosing a language that will be fruitful) is an awesome one.

Beyond and after playing an active role in helping the community unearth and find a language for its guiding vision, it may be the role of the guide to help this community deepen the vision by challenging it (e.g., by raising questions concerning ambiguous phrases, by offering different interpretations of key phrases, or by introducing difficult counter-examples). See in this connection #12.

12. The role of disequilibrium in the process of deliberation. The role of the guide, or coach, as a gadfly is a subject that was discussed at some length about two years ago in a CIJE/Mandel Institute consultation with Professor Israel Scheffler. This subject entered into our discussions as well. By confronting participants with the gap between what they say they are committed to and the values embedded in practice, by raising irksome but important questions about what they claim to believe, etc., the guide tries to foster among the participants a more thoughtful understanding of what they are committed to and its implications.

THE PLACE OF POWERFUL IDEAS, GROUNDED IN JEWISH SOURCES, IN THE PROCESS OF DELIBERATION AND CHANGE

As suggested above, early on a question was raised concerning how to infuse the community's deliberations concerning a guiding vision with powerful Jewish ideas. While some attention was paid to this issue late in the day, it requires much more sustained discussion. As a way of setting the stage for such a discussion (perhaps at our next meeting), you will find below a formulation of some of the issues in need of attention and a summary of a few points made in our discussion.

The challenges we face are a direct consequence of one of

our most basic convictions. CIJE strongly affirms that the process of educational deliberation needs to include serious struggle with questions of basic purpose and aspiration; and that this struggle will be enriched through the encounter with insights and perspectives found in Jewish thought. One challenge that grows out of this conviction is to identify ideas that will enrich deliberation in this way; a second challenge (perhaps that of the Priest rather than the Prophet) is to formulate and package those ideas in forms that will engage potential audiences; a third challenge is to find ways of meaningfully introducing these intellectual inputs into an individual's or a group's process of deliberation. Serious work needs to be done in all of these areas.

In relation to Alvan's case, the following questions come to mind as guides to continuing discussion:

- 1) what external intellectual inputs did Alvan try to introduce into the process he led, and for what reasons?
- 2) how and when did he try to introduce these inputs, and with what effects?
- 3) might there have been other fruitful ways through which to infuse the process with pertinent external inputs?

While this is not the occasion to address these issues, for future reference and discussion, the following point from our discussion may be worth incorporating.

While there is a tendency to think of the introduction of external intellectual inputs as taking place through an explicit encounter with Jewish texts or a précis of such texts, this is not the only, or necessarily the best, way to think about how Jewish ideas might be encountered. Consider in this connection the case of psychoanalytic therapy, in which the patient may learn all about projection, the super-ego, sublimation, and the unconscious without ever having read Freud. How does this happen? Through the therapist's questions, interpretations, and, on occasion, elucidation of concepts and insights that are at the heart of psychoanalytic theory. Offered succinctly at the right time and in the right way, such inputs can powerfully influence the patient's thinking and self-understanding.

Analogous considerations apply to guides helping clients (communities or educating institutions) strive for vision-sensitive educational practice. The guide's questions, formulations, metaphors, analogies, and interpretations at critical points in the process can introduce important new ideas and concepts in ways that powerfully affect the deliberation of

participants. If, for example, the client is wrestling with the aims of Jewish education, instead of urging the participants to read certain seminal articles, it might be more fruitful for the guide to offer short but graphic summaries of the ideas found in these essays (with careful attention to the needs of the moment).

If the guide is to play this kind of role, it is essential that he/she be steeped in the appropriate forms of knowledge and that he/she have the ability to access and use this knowledge at the right time and in the right (not heavy-handed) way to enrich the participants' deliberations.

DISCUSSION OF 'GUIDES'

This discussion focused on the possible wisdom of developing a serious and on-going group whose members would 1) serve as guides to communities, agencies, and institutions (and to CIJE itself) in their efforts to develop informing visions through a process that takes ideas (not limited to but especially ideas grounded in Jewish thought) seriously; and/or 2) develop materials of various kinds (e.g. theoretical pieces, portraits of vision-driven institutions, case-studies, cases, etc.) that would support and enrich the work described under #1. The proposal for "GUIDES" (an acronym for "Guiding Ideas Study Group") was handed out to participants at our meeting and served as the springboard to our discussion; this proposal explains why "guiding ideas" replaces the term "goals" in this document and tries to specify how GUIDES will function. No attempt is made to summarize that document, only to identify issues surfaced in the course of our conversation. As a prelude to this, it is important to note that members of the group that met in Providence reacted with enthusiasm to the possibility that we would constitute ourselves as an on-going group.

Purpose and character of the proposed group. In an effort to clarify how this group fits into CIJE and how, if at all, it differs from the Consulting Firm Without Walls, questions were raised concerning the basic purposes and character of GUIDES. The following points were offered in response:

a. GUIDES offers its members support and advice in their efforts to help Jewish educating institutions and the infrastructure that supports them to develop vision-guided practice through a process that takes ideas seriously.

b. The existence of GUIDES offers an opportunity to develop and expand a body of lore concerning how best to think about and to organize, in different settings and contexts, processes of deliberation and change that give a central role to informed and sustained reflection concerning basic purposes and aspirations.

This lore will include a developing body of concepts, insights, powerful examples, cases, case-studies, and theoretical formulations. These materials will provide us with springboards to our own continuing learning; they can also be used as tools in our teaching, in efforts at "seeding the culture", and in work with educating institutions that are struggling with their visional commitments..

c. GUIDES will offer its members an opportunity for growth that is simultaneously professional, personal, and Jewish. Jewish study figures prominently in the life of this group. Its centrality is predicated on the assumption that the insights, ways of thinking, and questions that emerge from the encounter with well-chosen Jewish sources will inform our thinking about the work that brings us together in powerful ways; and also on the assumption that the activity of learning together will contribute to the emergence of a kind of community and culture that will make our work richer and more personally meaningful.

d. While CIJE expects that members in the Consulting Firm Without Walls will be on-board with CIJE's beliefs concerning the centrality of ideas in the process of developing profound forms of Jewish educational practice, what will distinguish GUIDES is that the relationship between ideas and practice is at the heart of its members' professional and learning agenda.

The place of ideas in Jewish educational reform: three dimensions. Ideas being central to the work of CIJE and to GUIDES, it is important to note that our oft-repeated claim that ideas are central to the work of Jewish education is actually a summary of, or a generalization from, a number of distinct beliefs about the importance of ideas, including the following:

a. Judaism is rich with powerful ideas about human existence in its various dimensions, ideas with the capacity to engage mind and heart and to transform the way we understand ourselves and the world. Unfortunately, such ideas rarely enter into Jewish education as we know it. It is essential that Jewish education be transformed in such a way that its clients will regularly encounter powerful Jewish ideas in honest and powerful ways.

b. Too often educating institutions and the infrastructure that supports them operate without clear basic purposes that are capable of eliciting the support and enthusiasm of their constituencies; and even when lip-service (or more) is paid to a particular

vision or guiding idea, it rarely suffuses the life of the educating institution or agency in a more than superficial way. It is essential that Jewish educating institutions come to be informed by guiding ideas, or visions, that identify their central purposes and that suffuse day-to-day practice across contexts.

c. The process of clarifying or discovering an institution's, or our own, guiding vision is enriched through the encounter with powerful Jewish ideas that are pertinent to the questions under consideration. As examples, the attempt to develop a community-vision will be enriched through the encounter with variant Jewish conceptions of what it means to be a community; the attempt to clarify our vision of an educated Jewish human being will benefit from the encounter with philosophically different Jewish views of Jewish existence; and the attempt to develop an Evaluation Institute that will assess the work of Jewish educating institutions will do well to struggle with ethical and other issues pertaining to evaluation, confidentiality, etc. that are discoverable in Jewish sources.

While our work has sometimes suffered from a failure to distinguish between these related but different ways in which ideas figure prominently in our work, the GUIDES proposal, like the Goals Project that has given rise to it, assumes that GUIDES will be concerned with all three of them.

This formulation of the place of ideas in the work of GUIDES and CIJE brought forth a revised formulation. In contrast to the suggestion that Jewish thought has the capacity to elevate the level of discourse that informs deliberation concerning basic purposes, it was urged that we make the stronger statement that attention to Jewish ideas and perspective is indispensable in that it offers unique, otherwise unattainable, questions, insights, understandings, and solutions.

CIJE GOALS PROJECT CONSULTATION, JULY 1995
PROCEEDINGS OF DAY 1

SOME BASIC ISSUES RELATING TO THINKING ABOUT GOALS AND VISION

A number of general concerns were expressed concerning the challenge of meaningfully engaging educators and lay people in thinking about goals and about their relationship to educational practice. For example:

1. Nurturing the conviction that it is important for educators and lay leaders to wrestle with questions of goals and vision. There is a tendency to regard such reflection as irrelevant to the demands of practice, as well as a tendency to regard it as "too deep" for ordinary people. Either way, the result is that philosophical issues aren't engaged.

2. Avoiding being shallow and pedestrian/avoiding being too disconnected. If the conversation is overly-constrained by the questions, ways of thinking, and present outlook of the participants, there is a danger of shallowness. If, on the other hand, the conversation begins with reflections on "Great Thinkers" like Moshe Greenberg, it may feel too removed from their concerns and realities to seem relevant -- even if it seems interesting. How structure the conversation so that conversation seems tied to these concerns and realities and yet brings them to encounter rich Jewish ideas and conceptions that go their ways of thinking about things?

3. Will reflections on vision and goals infuse practice? Supposing that there is a rich and engaging conversation concerning our vision of a meaningful Jewish existence, it does not follow that the insights acquired and enjoyed in the context of that discussion will find their way into the world of practice. What must the conversation and/or its context be like if such discussions will not be compartmentalized and will in fact influence educational practice? Are there ways - say, via collaborative action-research efforts or through follow-up assignments, etc. - to make it likely that at the end of a seminar or a workshop the insights acquired there will inform what one does?

IF WE OFFER IT, WILL THEY COME?

Is there a demand "out there" for addressing fundamental questions concerning the goals of Jewish education -- so that if we say, "We're here to help you," communities and institutions will gravitate towards us?

Different views were expressed on this matter. Some felt that there is a demand, a demand fueled perhaps by a sense of desperation concerning our present predicament both as a

community and in our institutions.

Others wondered whether the demand would express itself through much more than a willingness to participate in a short-term seminar or retreat. Skepticism was expressed concerning the willingness of many institutions to sign on for a long-term process of study, reflection, and self-examination. Among the reasons offered for thinking that there might not be an eagerness to engage in this kind of process were the following: a) Like us, other educators are already feeling over-worked and feel that they don't have the time and energy to invest in such a process; b) such a process might seem to threaten the leadership's authority or what might feel like a fragile consensus among the membership; c) there might, as noted above, be skepticism concerning the practical "pay-off" in thinking about questions relating to basic educational aims.

To the extent that this skepticism is warranted, it highlights one of the major questions the project has to contend with: namely, how do respond to these obstacles? how do we bring educators, lay leaders, and parents to understand the importance of addressing basic questions concerning the aims of Jewish education in a sustained and serious way? How, as one of us put it, do we overcome the resistance to serious thinking and engender the motivation to engage in it. This question called forth a number of different kinds of responses:

1. A central challenge may be to make vivid the gravity of our situation as a People and the ineffectiveness of existing educational efforts to address this situation. Related to this was the suggestion that we make vivid to those we speak with that education is the arena in which we work out our future as a People.
2. Frame the conversation as an invitation to reappropriate our heritage as a People that has played the significant role it has in history because of its willingness to think about "the Big Questions".
3. Initiate and stimulate the conversation by inviting those we speak with to personalize "the Big Questions" --to ask themselves why they think it's important to raise their children as Jews, and how they will answer their children's questions concerning why it is important or worthwhile to live as a Jew.

It was noted, in this connection, that to engage not just individuals and institutions but the North American Jewish community as a whole in wrestling with this larger question may be the most important goal of the Goals Project. There was, in this connection, some

discussion of whether this larger question is being meaningfully addressed anywhere right now -- and if not, why not.

4. Offer a "For instance!" -- a vivid example of the good things that have happened when the stake holders in an institution have seriously wrestled with questions of vision and goals and their relationship to practice.

5. Attack - by showing the weaknesses of - the "quick-fixes" that are alleged by some to respond meaningfully and adequately to our difficult predicament as a community.

In these varied ways, the challenge would seem to be to nurture a culture or a consciousness that will welcome and even demand the kinds of serious thinking the Goals Project hopes to encourage. But, as noted above, the obstacles ought not to be underestimated.

SUPPOSING THEY DO COME TO US FOR HELP, DO WE HAVE MUCH TO OFFER?

The problem. As long as we confine ourselves to asking ourselves how to motivate people to want to wrestle in a serious way with a goals-agenda, we don't have to face a very tough question: would we know how to help them if they did seek our help? Do we yet know how to help them think about goals and vision in ways that will illuminate practice, and about practice in ways that will lead them to struggle meaningfully about questions of fundamental goals. We speak about the importance of doing these things - but do we know how to do these things - how to raise the level of discourse, or how to help an institution that has begun wrestling with questions of underlying vision to arrive at any shared conclusions that can inform practice.

The solution. We need to find concrete ways of infusing serious philosophical content and deliberation into the work of Jewish educating institutions - and to do so in such a way that the infusion will be neither pedestrian nor perceived as irrelevant. It was in this context that the concepts of maps (topographic and other), tool-kits, libraries of resources, and grids entered our conversations. To be effective in responding to a problem or situation, the coach will need a map of the domain in question that will suggest categories, questions, a range of alternative responses, pertinent materials and ideas of different kinds. The map serves more than one purpose: it helps to interpret the question or situation at hand, but it also suggests a range of possible ways that coach could, depending on his or her assessment of the situation, respond.

The concept of a map is pertinent no matter what the level

at which one starts. If one starts with basic philosophical questions concerning the meaning of Jewish existence, map could point one towards various views on these questions, towards the ways answers to such questions may implicit in existing educational practice, or towards questions concerning how a given answer to such questions - say, Buber's or Rosenzweig's -- might color one's approach to curriculum design or design of the social environment. The map would suggest directions to go and perhaps tools needed to move in such directions. Alternatively, the map could direct one from very practical questions -- Should the children be asked to wear Kippot? or what-not? - to questions at various other levels.

Given an appropriate map and an interest in engaging the participants in reflections on goals and their relationship to practice, any situation that arises in the coach's interaction with the participants can forward the agenda. It was the categories, the questions, the understandings, and the concerns with which DM listened to what the Agnon teachers were saying about Israel that allowed him to size up the situation and to respond to it in ways that led them to think meaningfully about basic questions concerning the meaning of Jewish life and the role of Israel (and Cleveland) in it. And GD's example that built on a video concerning "good Bible Teaching" also highlights the ways in which, informed by appropriate questions, categories, and materials, this situation might lend itself to illuminating basic goals-related questions.

It was noted that developing an adequate map could well be a difficult task requiring significant and varied forms of expertise. The particular example we focused on concerned the teaching of Bible, and we spent some time thinking about the kinds of individuals it would be useful to engage in identifying different conceptions of teaching and learning Bible, how reflection on a particular Bible curriculum could stimulate questions concerning the nature of Torah and its place in Jewish existence, etc.

While the concept of a map suggested various directions one could go and where they might lead, that of a library of resources suggested something that included strategies and resources as well. Using this library, the coach is someone who would size up a situation with an eye towards identifying the level at which the presenting situation should be responded to in order to exploit its potential to stimulate fruitful reflection, as well as to determine the kinds of resources and strategies that have promise of stimulating such reflection at this level.

All of this led us to discussions of grids that focus our attention on the different levels at which the conversation might proceed, on the kinds of resources and questions that might be pertinent -- all in response to a presenting situation that might

range from uncertainties about the Hebrew curriculum, the problem of vandalism, an interest in developing a school-wide mission, etc.

While a grid seems helpful in reminding us about the kinds of things we should be attending to, a caution was expressed about prematurely - or, indeed ever - reifying it and treating it as anything more than a flexible and revisable tool for illuminating the complexity and the choices to be made in a presenting situation.

Treated in this spirit, however, some felt that a grid could be very helpful a) in sizing up a situation; b) in determining a response along a number of dimensions -- level, materials, strategies, aims, etc.; c) in identifying some of the work-- indeed, the learning -- that the Goals Project needs to begin doing if it is to develop a rich map to be used in preparing coaches or in working with institutions.

An important point implicit in our discussion of maps, grids, resource-libraries, and tool-boxes is that none of them removed the need for good judgment on the part of the coach - the ability to size up what's going on and judging how to respond, drawing on the various concepts, strategies, and materials in his/her possession.

A "PROFOUNDLY SHALLOW" ALTERNATIVE

Although not made explicit, the model implicit in much of our conversation gives the coach a very active guiding role: the coach sizes up the situation and guides the course of the deliberations of teachers and/or the principal and/or the lay leadership towards , or back and forth among, certain levels in order to stimulate a more goals-sensitive community and educational environment.

As an alternative, I.S. proposed a very different model, one which emphasizes self-direction and self-study on the part of the institution's stake holders. On this model, what "we" would provide is a center to which the participants in an institution would come in order to get help in identifying resources that would be useful to them in addressing their real and living concerns and problems. They are the ones who would identify and interpret their pressing problems and the best ways to address them using what resources. The Center would offer them a menu of resources and possible routes to go -- but would leave it in their hands which route to go, which materials to use, or how to use them.

Though generally non-directive, the model allows for the possibility that at the beginnings of the process, the Center or a coach might play a more active role in setting the tone, in

establishing a culture that respects and encourages non-fake, genuine openness. But the aim is to make yourself dispensable-- and the best way to do this is to discourage dependence on the coach from the very beginning by putting the responsibility in the hands of the stake holders: it is by being responsible for our own growth that we develop a culture that thrives on being responsible for its own growth, rather than looking to someone else to stimulate it.

The aim, he suggested, is an institution which has internalized an ethos of continuous self-renewal through on-going reflection and self-study concerning what it is trying to do and how it is setting about trying to accomplish it.

The model has any number of appeals: For example: 1) it doesn't infantilize or create dependence on outsiders; 2) efforts always remained tied to the real and living concerns of the participants; 3) it affirms the power of human beings without special expertise and proceeding on their own to come to arrive at powerful insights and adequate solutions to their problems.

At the same time, the model called forth a number of concerns, including the following:

1. Left on their own, will there be a tendency to gravitate the least common-denominator?

2. Will potentially powerful and very pertinent materials not be considered or not be used in the most effective way because the participants didn't bring with them the requisite background of understanding?

3. Will the level of discourse remain superficial, rather than growing in depth?

4. Will critical questions not get asked? When I.S. studied a philosopher with his teachers-to-be, he asked them to think in certain ways about that thinker's bearing on educational practice? Assuming that this is important, can one assume that it will happen without the suggestion or prodding of an outsider?

This is, it was noted, particularly important when we think about figures like Moshe Greenberg: is it enough to encourage a reading of what he has to say, or is the impact richly enhanced if questions focus the attention of the readers on 1) how his conception differs from their own intuitive views, or on 2) what it would mean to organize Bible study or teacher-training or After-School sports on the Greenberg model.

Among the questions that got raised in this connection concerned the desirability of encouraging people to apply what they read or think about to questions of practice (via exercises, questions, etc.). As against the view that this was desirable,

the view was expressed that a rich encounter with a text is likely to have rich echoes in one's approach to one's work even if one hasn't systematically sought the connection, and also that the effort to force a connection might unduly narrow one's appreciation of the text. That there might be ways of encouraging attention to educational implications without unduly narrowing one's reading of the text was also a matter we considered.

5. The role of a thoughtful outsider - a "critical friend" as members of Sizer's coalition say - in identifying blind-spots in an institution's thinking, or points of resistance, or unspoken questions that lie behind what is uttered, was also noted.

6. A concern was expressed that while this kind of an institution might address varied concerns about one or another aspect of their school, it might never spontaneously move on to the "big questions" concerning the *raison d'être* of Jewish education and Jewish existence.

At work in many of these questions is a fundamental issue concerning the amount and kind of structure, direction, or guidance on the part of an outsider will be fruitful (and at what price) -- an issue whose resolution would seem, as one person noted, to depend (as does the other approach) on a number of basic assumptions concerning human nature and human learning.