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73

Folder
7

Change Think Tank. Synagogue change project, 1998-1998.

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SECOND-GENERATION SYNAGOGUE CHANGE PROJECT CONFERENCE CALL: SUMMARY OF THE OCTOBER 1997 CONFERENCE CALL

What follows is not a blow-by-blow account of the conversation but rather an attempt to identify major issues and questions that arose. Overall, this was an exceptionally thoughtful, congenial, and fruitful conversation -- quite a feat considering the number of participants and the fact that we were all on a conference-call.

KAB's clarifications. At the beginning of the meeting, KAB clarified a couple of points which she felt had not been clear in the original proposal. One of these was that the emphasis in year 2 of the project would be on the **learning aspects of congregations**; the second is that year 2 of the project is not just an experiment in synagogue-change, but also in collaboration among a variety of key stake holders in a local community, including denominational movements and Federation, with CIJE as facilitator. It was noted by more than one person that the involvement of these stake holders was not clearly articulated in the document considered by this group.

Are there enough local change-ready institutions in any one community? KAB's initial approach to the project is to identify a community that includes a number of change-ready institutions. Isa expressed considerable skepticism, at least initially, concerning the likelihood of identifying in any one community a sufficient number of change-ready institutions, and she suggested that we might therefore want to consider an approach that wasn't local but, instead, regional or national. In response, and based on his experience with Synagogue 2000 (using the Washington D.C. example), Larry indicated that he was considerably more optimistic concerning the identification of a sufficient number of change-ready institutions. In the Washington example, quite a few congregations offered themselves as possible participants, and it was not difficult to identify 5 that seemed very promising. Though Larry acknowledged that a congregation's capacity to present itself as change-ready in the "courting-phase" might not prove an accurate index of whether it really is change-ready, his comments served to alleviate some of the sense of anxiety felt by others, including Isa (who seemed to let go of her initial skepticism). In any case, from a learning point of view, Isa seemed to feel that it might be interesting and fruitful, in Year 2 of the project, to include congregations at varied levels of readiness; this would allow for experimenting with different intervention-strategies that may be appropriate at different stages of the change-process.

Involving Federations and Denominations in the process. As noted above, the document was lacking any significant statement concerning a matter which, for KAB, seems to be critical -- namely, involving Federations and Denominations, in the overall process. The sense of the group seemed to be that although involving these bodies would enormously complicate the project, it was well worth it (from the standpoint of contributing to systemic change, of growing the project beyond the initial congregations that were to be its focus).

The wholesale/retail distinction. This distinction, advanced by Larry, concerned the way we planned to operationalize, or move forward from, the project's findings. While I personally did

not entirely understand what the two models would look like, there seemed to be a general sense that the distinction was an important one in guiding our work.

“Second-generation” language. More than one person expressed uncomfortableness with the “second generation” terminology -- especially those individuals who are involved with what are by implication “first generation” change-efforts, efforts which - so the language implies - are being surpassed by new, more advanced approaches. There seemed to be a shared sense in the group that this terminology should be abandoned.

The project’s objectives. Some of our discussion focused on the objectives of the project as delineated in the “Summary of the Proposal”. Below are some of the points that were made.

1. To Isa, #3 (pertaining to “Creating written materials”) did not rise in importance to the level of the others, and she expressed serious doubts concerning whether materials developed under the auspices of various projects actually get used in a meaningful enough way to justify their creation.

2. There was a rich discussion of objective #4 that pertains to the development of “models of excellence”. Isa expressed a wariness of such models (and even of the term “model”) on the ground that the implication seemed to be that everyone should emulate, should try to be like, the model-synagogues; she expressed the concern that they would be placed on a pedestal, and that other institutions would suffer as a result -- either slavishly imitating these models of excellence or coming to feel that it’s impossible to be like them. I think it was Larry who, in this connection, suggested we consider dropping the phrase “models of excellence” in favor of something like “test-sites.”

While everyone seemed to concur that holding up models of excellence involved certain risks, not everyone agreed that the effort to develop “models of excellence” (or even the use of this term) would have the results Isa feared. In fact, several people seemed to feel that the availability of varied examples of excellence could be enormously helpful, motivating, and inspiring to congregations striving to improve themselves, so long as such examples were presented in ways that were mindful of the kinds of dangers Isa had identified.

“Research questions” section. Here are some issues that were raised and some points that were made::

1. Whereas questions 1 - 5 indicate an interest in the way congregations conceptualize “success” and the place of Jewish ideas in these conceptions and in the approach to change, these emphases drop out in #6, the “Based on the above” question, which tries to pull everything together.

2. Missing from the research questions was a question that concerned the congregation’s

philosophy of education and the role of this philosophy in the process of change.

3. Other missing dimensions that were noted included the following: How does a congregation decide to get involved? What's the impact of involvement? What kinds of resistance are encountered in the process? What's the lay/professional role and pattern of relationship in the process? [In other words, missing from the research questions is a sociological/ethnographic dimension that captures the process of change itself.]

Nature of the research/inquiry strategy or methodology. There was a rich discussion of what might be the most appropriate strategy or set of strategies for this project. This discussion began with the suggestion that it is dangerous to use hypotheses as guides in qualitative research, a suggestion that was responded to with the suggestion that the kind of research that is appropriate and whether research should be informed by explicit hypotheses depends on the state of the field. Likely as not, at our own stage, a mixed approach drawing on different inquiry strategies would be appropriate, it was suggested by one participant.

In the context of this discussion, a number of different possible research-strategies were alluded to. These included using surveys, ethnographic studies, and interviews as vehicles of illuminating the phenomenon of interest. Which of these (and others) are appropriate will depend on what it is we want to find out. In this connection, one participant identified what he/she considered 4 critical questions that should inform our thinking concerning the project's research-agenda:

- a. What would we count as success?
- b. What processes get to success?
- c. What kinds of data regarding process and outcome do we need to collect?
- d. How can these data best be collected, i.e., what methodology or inquiry-strategy is appropriate to our needs as they emerge from answers to a. - c.?

By the end of this discussion, there was a consensus that the issue of appropriate inquiry-strategy is of central importance, and that CIJE should draw on its research-expertise resources in general education to enrich its deliberations on this matter. It was also suggested that we call on a person (name???) who recently offered a powerful critique of the Coalition of Essential Schools to learn how he/she approached his/her study of these schools.

Interface between this project's research efforts and research already going on under the auspices of projects like ECE and Synagogues 2000. It was suggested that we should try to build on rather than duplicate research efforts already going on. Among the reasons offered for this was that synagogue-change projects already place substantial demands on congregation-based individuals who are involved with them, and there is a danger of over-loading them.

Though the idea that we should build on rather than duplicate existing efforts was not challenged, Isa indicated that she was not as concerned about over-loading folks at the local level: based on her experience, people love opportunities to talk about what they're doing.

General rather than institution-specific findings. It was suggested by Karen that inasmuch as our project is concerned with general strategies, processes, and ideas, and not in individual institutions, findings should be presented without naming particular institutions to which these findings refer.

Where does this project fall on the Scaling-up vs. modeling continuum? This distinction was introduced at some point in our discussion and may prove a useful one in trying to understand and illuminate the nature of the project. It was noted that some of our discussion on this occasion seemed to assume the importance of "growing" new efforts, i.e., of scaling-up, **but** that this emphasis is not reflected in the document's statement of design and objectives.

The concept of "significant change". This project declares itself to be interested in 'significant change'. But the question arises: what is to count as "significant change", and who is to be the judge of what counts as "significant change"? In response to this question, nobody felt the need to arrive at any single answer. It was suggested that we might be interested in answers to the question "What counts as significant change?" that emanate from four different sources: 1) the rabbis [Did this refer to the rabbis of congregations associated with change-projects?]; 2) the concept of "significant change" associated with some of the national Change-Projects (like ECE and Synagogues 2000); 3) significant change as understood by the Steering Committee of this umbrella project; 4) significant change as understood by 'the people on the ground' [I'm not sure I remember who this referred to.]

What would 'we' (the Steering Committee of this project) count as 'success', as "significant change"? In the midst of discussing the concept of significant change, participants in the conference call were asked how they would respond to the concept of "success" or "significant change" that seemed to be embedded in the proposal-document ("....." See the paragraph in that document that speaks to this issue). The group seemed comfortable with this formulation. One person suggested that in trying to grapple with what we would consider "success", we would do well to consider Woocher's formulation in a particular article [Need to find the reference; ask Woocher or Isa]

Who is to do/oversee the research? A question was raised concerning who should do/oversee the research? As against the possibility of hiring someone to oversee the research-project, it was suggested that Karen Barth would oversee the project as a whole and would parcel out different pieces of research as appropriate. Challenges on the horizon include a) getting a list of names of people who have the ability to do different kinds of pertinent research (names like Shusterman and Laura Samuels and Kugelmass were mentioned; so were Sandy Dashefsky, Lisa Malik, and Kathy Simon; b) convening a small deliberation team that will include a senior researcher who is an expert in multi-site research (someone like Matt Miles). [Not mentioned in this phase of this

discussion, but perhaps implied in our earlier discussion concerning determining a deliberation-strategy, is that at some stage in this process, and perhaps at the beginning, it may be wise to convene a meeting of individuals with research expertise who can help us think through the question of research-methodology in relation to our aims.]

Time-line. At least one participant in the conversation expressed some concern about the time-line for the project; it seemed to this person unrealistic to think that we would know enough after the second year of the project to come up with substantial research-findings. It was responded that the time-line was crafted with attention to the requirements of the organization distributing grant-funds, and that it was understood [by us and by the granting-organization??] that the project would need to extend beyond the specified period.

Steering committee involvement in the project: hard questions of time and money. A question was raised concerning the amount of time the participants in the phone-conference and others who might be added to our group would be expected to spend on the project and what kind of compensation might be involved. KAB suggested that because of the different circumstances of the participants, these matters would have to be handled on a completely individualized basis. The fact that for some of us this work falls under our job-descriptions, whereas this is not so in the case of others, makes any single policy impossible to devise.

Adding others to the Steering Committee?? There was some discussion of the advisability of expanding the project's steering committee. The names of Reimer, Shevitz, and Prell were mentioned as possibilities.

Our working together as a group. As noted at the outset, the sense of the group is that this was an exceptionally fruitful meeting, and a question was raised concerning future meetings of this group. Three ways were proposed: face-to-face, conference calls, video-conferencing. The sense of the group is that it may be necessary/wise to use all three strategies. While complex schedules make face-to-face meetings difficult, participants seemed to feel that, along the way, some such meetings would be desirable.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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FAX TRANSMISSION COVER SHEET

Date: July 29, 1997

To: Dctn Pekarsky

Fax:

Re: Synagogue Change Project & Conference on Rabbinic Education Proposals

Sender: Megan Ifill for Karen Barth

YOU SHOULD RECEIVE 14 PAGE(S), INCLUDING THIS COVER SHEET.

CONFERENCE ON RABBINIC EDUCATION

The American rabbinate is in flux. With synagogue transformation in the air and the baby-boomers coming into middle age, the congregational rabbi is being called upon to fulfill new roles and to carry out old roles in new ways. At the same time, more and more rabbis are moving into careers outside of congregational settings.

The leaders of the major rabbinical schools are struggling to respond to the challenge of these changing realities. Many of the major schools are in the process of looking at how to revamp their programs. They are talking about rabbis as spiritual leaders, rabbis as change agents, rabbis as educators (in the broadest sense), rabbis as community builders, rabbis as chaplains, rabbis as pastors, rabbis as outreach workers. They are trying to define what these mean in relation to educational goals, curriculum, pedagogical approaches, campus life, role models, field experience and many other aspects of their programs. At the same time they are struggling with the reality that most incoming students need an enormous amount of basic learning in language and texts.

In the course of CLJE's consulting work with some of these institutions, it has become clear that they have much to learn from each other and that they might also gain from learning about state-of-the-art thinking from outside of the Jewish world: e.g. from the field of general education in such areas as faculty training, curriculum development, mentoring programs, models of teaching and learning, goal definition, and from approaches used to train leaders in other fields.

THE OBJECTIVES OF THE CONFERENCE

We are proposing to plan and hold a conference that will bring together the leaders of rabbinic education programs from around the world. The objectives of the conference will be four-fold:

- 1) Reflection - To provide the leadership of rabbinic education programs with an opportunity to step outside their daily environment and reflect upon the changes happening in rabbinic roles and the implication of these changes for rabbinic education.
- 2) Idea Sharing - To provide a forum in which ideas can be shared and leaders can learn from each other.
- 3) New Perspectives - To present and discuss ideas from related fields of endeavor such as: business, general education, political science, and the training of leadership, that might stimulate new thinking about rabbinic education.
- 4) Discussion of ongoing needs - To encourage these leaders to think about whether they might benefit from meeting or working together in an ongoing way, and, if so, in what context this might take place.

THE CONCEPT

In the business world, conferences are occasionally organized between the top executives of an industry, bringing together corporate leaders from competitive organizations who otherwise might not ever have occasion to speak to each other. At these conferences, with the help of highly skilled facilitator, these leaders have an opportunity to discuss the big issues that the industry as a whole faces and to exchange ideas with others who are facing these same issues. Typically, such conferences include brief presentations by a select few industry analysts and thinkers. These are usually delivered in an interactive style, keeping lectures to a minimum. Senior executives find these gatherings extremely interesting and helpful, and very rarely turn down an chance to attend.

Our concept is patterned after this model. We will bring together the senior leaders of the world's rabbinic education programs in a setting conducive to roundtable discussions. The group will be a small one in order to encourage interchange of ideas during the formal program and also during the informal parts of the conference. Facilitators will help ensure that the conversation stays focused. Presenters will offer new ways of thinking that would seed the deliberations with new ideas.

THE PLANNING PROCESS

We will convene a planning meeting to which representatives of all the institutions will be invited. The international institutions and those finding it difficult to travel can join by teleconference. This planning group will decide on the agenda, the invitation list, the topics to be discussed, the presenters and the logistical arrangements. Recommendations in each of these areas will be prepared in advance of the planning meeting by CIJE staff, based on phone calls with the participants.

PROGRAM

We envision a 3-day, 2-night conference. Some of the issues that might be addressed are:

- ◆ Changes in rabbinic roles and their implications for educational goals and programs
- ◆ The development of the rabbi as a spiritual person
- ◆ Approaches to teaching and learning inside and outside the classroom
- ◆ The recruiting, training, development and ongoing management of faculty
- ◆ Improving the educational effectiveness of mentoring and field work programs

- ◆ The role of rabbinic education programs in the ongoing development of rabbis after graduation.

The program will be developed by the planning committee but will likely include some or all of the following:

- ◆ Facilitated roundtable discussions on key issues
- ◆ Brief presentations followed by discussions with leading thinkers from other relevant fields
- ◆ A panel/discussion with leading congregational rabbis
- ◆ A session devoted to sharing of specific new ideas and to discussing experiments currently underway
- ◆ Text study
- ◆ A discussion of what ongoing meetings or collaborative projects might be fruitful.

INSTITUTIONS TO BE INVITED

Our initial thoughts are that the following institutions should be invited:

- ◆ Hebrew Union College
- ◆ Jewish Theological Seminary
- ◆ University of Judaism
- ◆ Reconstructionist Rabbinical College
- ◆ Yeshiva University
- ◆ The Academy for Jewish Religion
- ◆ The Leo Baeck College
- ◆ Jews College of London
- ◆ Seminario Rabinico Latinoamericano, Argentina

- ◆ Any other major Orthodox seminaries interested in attending

The smaller institutions will be invited to send up to two people, the larger ones up to three. This would mean a group of roughly 25, plus presenters and CIJE staff.

LOGISTICS

Our initial thinking on the logistics is to hold the conference at the Chauncey Conference Center in Princeton, New Jersey. This conference center is 1½ hours from New York City and 1 hour from Newark Airport. It is a beautiful, secluded spot with rolling lawns, ponds and garden and modern, business-like meeting facilities. It is less "corporate" than most such facilities but still efficient and comfortable.

Kosher food can be brought into the facility from a nearby kosher caterer, heated and served by the Center's kitchen staff. A local *Mashgiach* would be hired to oversee the food service.

* * *

It is our firm belief that development of dynamic, inspiring leadership is the most important challenge in the revitalization of Jewish life in North America, and that the education of rabbis is an important place to start reexamining the way the Jewish community prepares people for leadership roles. This conference could become a catalyst for important change in the way rabbinic leaders are recruited, trained and developed, and could ultimately have far-reaching impact on the preparation of all types of leaders for Jewish organizations.

BUDGET

CIJE

Staff	\$20,000
Secretarial	5,000
Postage, Phone, Supplies	1,500

PLANNING MEETING

Travel, Meals, Hotel	3,500
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CONFERENCE

Facility (250/day x 2½ x 35)	22,000
Travel (Participants)	15,000
Honoraria and Presenters travel	10,000

PUBLICATION OF PROCEEDS

Publication costs	5,000
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TOTAL	<u>\$82,000</u>
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CIJE would contribute its staff and secretarial time, postage, phone and supplies as well as the cost of the planning meeting and publication (total \$35,000). We are seeking a grant for the balance of \$47,000.

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SECOND GENERATION SYNAGOGUE CHANGE PROJECT

PROJECT BACKGROUND

CIJE is committed to the revitalization of Jewish life through education. We believe that development of vibrant synagogues as centers of Jewish learning and living is a critical -- perhaps the most critical -- factor in meeting this challenge. As Dr. John Ruskay, Group Vice President Program Services, UJA-Federation of New York, wrote in *The Journal of Jewish Communal Service (Fall/Winter 1995/96)*:

For Jewish education to be effective, there must be Jewish community in which what is being taught is visible and valued....If communal policy seeks to strengthen Jewish identity for marginal Jews, then creating compelling, engaging, inspired communities and institutions is necessary and must become a more significant communal strategy. Synagogues, JCCs, Hillels, and Jewish summer camps are of particular significance in the creation of compelling communities. For it is precisely in these institutions that marginal Jews encounter Jewish life. And of these institutions, the synagogue is of particular import because more Jews cross its portals than any other institution.

The synagogue today is in trouble. While 40-50% of U.S. Jews are members of synagogues, few of these seem to be seriously involved on a year-round basis in the study programs, prayer services and volunteer activities that the synagogue offers. Rabbis and synagogue lay leaders report frustration that so many members view their membership dues as a fee-for-service that buys them access to high holiday tickets, education for their children and the availability of a friendly rabbi for life-cycle occasions. Focus groups with less engaged members suggest that many find these occasional encounters with the synagogue to be unexciting and irrelevant to their lives.

Is it possible to change this? Is it possible to create synagogues where the majority of members are actively involved on a year-round basis? Where both adults and children are engaged in serious learning, prayer and volunteer work? Where these activities are infused with a sense of real meaning and are a vehicle for spiritual growth? Where even those who have previously rejected organized Jewish life can find something worth coming home to?

There are reasons to believe that it is. Around the country are examples of charismatic Jewish leaders who have created a synagogue, Hillel or adult study program that has begun to engage people on a large scale. In the Christian world, the mega-church phenomenon has demonstrated that redesigned churches can attract tens of thousands back into church life.

These examples give us hope, but there is still much work to be done to create a culture

of excellence in synagogue life with sufficiently developed models to inspire and guide the revitalization of synagogues on a broader scale. Around the country, there has been a wave of synagogue change projects. These include the Experiment in Congregational Education (ECE), Synagogue 2000, the McKinsey Synagogue Project and many smaller projects sponsored by federations, foundations and individuals. These projects, while relatively new, have already achieved some inspiring successes. However, many of us who have been involved with synagogue change projects feel that the success rate and the degree of change has been lower than we would like to see, and that we might benefit from stepping back, reflecting on what we are doing, and building a second-generation approach to synagogue change.

SUMMARY OF PROPOSAL

In the belief that such an effort is of critical importance, we are proposing to develop this second-generation approach to synagogue change, to pilot it in select synagogue settings, to systematically study and learn from our experience and to disseminate the findings. The objectives of the project we propose go far beyond the development of a few great synagogues. They include:

1. Beginning to create a knowledge base about synagogue change that can inform the thinking of those doing this work around the country
2. Creating written materials that can be broadly distributed and used in the training of rabbis, synagogue lay leaders and others in key leadership positions
3. Helping to push forward the thinking of the key people running major synagogue change projects by providing them with an opportunity to learn from each other's experience and to reflect on their own experience
4. Facilitating the development of a few synagogues as models of excellence that can become resources for the broader dissemination of the ideas and approaches that they have developed.

OUR APPROACH TO THE PROJECT

Our thinking about how to develop this second-generation approach to synagogue change brings together three significant elements which we believe will, through their dynamic interaction, produce credible and significant results:

1. Ideas about effective institutional change grounded in the experience of CIJE staff and consultants facilitating change in a variety of settings, as well as in systematic studies of change processes in different contexts

2. Commissioning a careful review of recent synagogue-change projects, a review designed to maximize our learning from what has already been tried
3. Establishing a leadership-team for this project that includes thoughtful and imaginative individuals with a range of important and complementary competencies who are serving as leadership in current change-efforts. The job of this team will be to scrutinize the ideas and findings identified in 1. and 2. and together to develop the project's second-generation approach to change

CIJE'S emerging ideas about change

Based on our work and research to date, we believe that effective institutional change requires systematic attention to six elements:

1. **Vision** - A clear articulation on the part of the leaders of the change project of the nature of the changes that the project is seeking to create, i.e. a clear statement of what about the new model is different from the old one. Such a vision must be based on ideas that are powerful enough to inspire real transformational change
2. **Leadership** - Internal leadership that is ready and capable of driving the change process. The leaders must be truly "on board" with the vision that the outside organization is offering
3. **Change process** - The project must have a change process that lays out the steps necessary to move the organization from where it is today toward the vision for the future. While every situation is different, such a process usually includes ways of involving a broad base of people in the change process and building toward consensus, a methodology for customizing the project's overall vision for the individual institution, an approach to communication with various constituencies, the development of a change leadership group, the design of the research, analysis and decision-making mechanisms necessary to put change initiatives in place, and a way of addressing the likely obstacles to successful change
4. **Culture** - The culture of the organization must support the desired changes. If it does not, specific approaches are needed that can move the culture and the mind-set of the congregation forward
5. **Skills** - The skills of the people who must do the work almost always need to be retooled in order for them to succeed in the changed environment. Change projects often deal with the above four issues but forget to address the skill needs of the people who will be left with the job of actually implementing the changes

6. **Resources** - The organization must have sufficient human and financial resources to implement change

Based on this model of change and other insights that have emerged in the course of our working with synagogues and other Jewish settings, we have developed a set of, we believe, powerful ideas about how to approach second-generation synagogue change efforts. While the design of the project allows for the possibility that these ideas will undergo interpretation and revision as the work unfolds, we are confident that they will significantly shape the direction of the work. They are:

- Clear specification of the **vision** of the revitalized synagogue, with a stronger focus on building something that works for "outsiders" to synagogue life
- An emphasis on encountering powerful Jewish ideas which have the capacity to illuminate the process and aims of the change project
- Extensive skills and ideas training built into the process for lay and professional leadership and for other employees of the synagogue
- Tough "admissions" requirements for synagogues with particular attention to the issue of leadership and to the availability of resources
- Sufficient planning time and resources up-front for careful design of the change process, based on serious reflection and analysis of what is working, what is not working in current synagogue change programs, and why
- A focus on serious Jewish learning as both a vehicle for change and an end product of change
- Sufficient funding and a small enough number of congregations to allow for intensive consulting resources to work with each synagogue
- Selection of synagogues from one geographic area to facilitate frequent meetings and cross-fertilization of ideas

In addition, while this project would address all aspects of synagogue life, we feel that there is a particular need to deal with the synagogue as a center for education. When we say education we mean it in the broadest sense as **the transmission of culture across generations**. Therefore, we believe that this project must pay careful attention to:

- Methodologies for education of adults that can both inspire and inform
- The challenge of the education of children and families i.e. the redesign of the system of supplementary education in synagogues

The leadership team

We propose to put together a leadership-team that brings imagination, critical thinking, substantial experience with synagogue-change, and to put in its hands the responsibility for jointly developing this second-generation approach to change to change. Our current thinking is to include the following people:

<u>Name</u>	<u>Institutional Affiliations</u>	<u>Committed</u>
Karen Barth	CIJE	Yes
Larry Hoffman	HUC/SYN 2000	
Ron Wolfson	UJ/SYN 2000	
Linda Thal	UAHC/ECE	Yes
Isa Aron	HUC/ECE	Yes
Barry Holtz	JTS/CIJE	Yes
Jonathan Woocher	JESNA	
Rob Waitman	McKinsey & Company	Yes
Carolyn Keller	Boston CJP	
Daniel Pekarsky	CIJE/University of Wisconsin	Yes

Reviewing first generation change efforts

Our plan is to hire researchers who will meet with the leaders of major synagogue change projects and with the lay and professional leaders of a representative group of the synagogues themselves. Interviews would be conducted in order to understand how the nature and the aims of the change process are understood by those engaged in those projects and to assess the degree of change underway, the extent to which the process itself helped or hindered change, the major obstacles to change and the key factors in examples of success. Cases would be compared to evaluate whether there are any systematic differences between the synagogues that are achieving greater success and those that are less successful. The researchers would also look at the ways in which Jewish learning and Jewish ideas are integrated into the change process.

The leadership team would meet 5-7 times to review and interpret the research as it unfolds and to begin to debate and design a next-generation change process. A small working group would meet more often to plan these meetings and pre-digest the research data.

THE PROJECT TIMELINE AND WORKPLAN

Year 1 of the project would be devoted almost exclusively to research and design of the process.

Midway through Year 1, we would begin to recruit synagogues and consultants for a project to start up at the beginning of Year 2. The leaders of the selected synagogues and the consultants would be brought into the design process toward the end of Year 1.

Year 2 would kick off the actual testing of the second-generation process. It is impossible to detail the exact activities of Year 2 ahead of time, since the specifics will be developed during Year 1, but it is likely that they would include some or all of the following:

- An intensive training program for lay and professional leadership focusing on powerful ideas that can help them to build a communal vision, and on the techniques of change leadership that can help them turn the vision into action
- A training program for the consultants to ensure that they are working with the synagogues in a consistent way and that have the necessary tools to do the work
- A retreat for participating teams from each synagogue to enable them to learn from each other in an intensive environment and to provide an opportunity to model the types of changes that are encompassed by the project's vision of a synagogue
- 4-6 additional meetings of the synagogue teams to touch-base and share problems and successes
- Intensive consulting support for the synagogues to guide them through the process and keep things moving forward
- A travel program for members of synagogue teams to visit centers of excellence.

In addition, the researchers would continue to work with the project to provide feedback to the leadership team, which would meet regularly to make mid-course corrections.

In Year 3, the project would likely begin to intensify its focus on making change happen within congregations. Ongoing consulting support and training for the synagogue leadership would continue to be provided and at least one retreat would probably be held for the synagogue teams. The process of ongoing reflection by the leadership team would continue, and the results of the first two years would be written up for publication.

All evidence suggests that three years is too short a time frame to complete a process of synagogue change. We are looking for funding partners who are willing to consider a renewal of funding for a second three-year period, if the evaluated results of the first three years suggest concrete direction and real promise for the future.

CIJE EXPERTISE

CIJE staff members and consultants bring unique expertise to this project. Karen Barth, Executive Director of CIJE, brings 10 years of experience working with large corporations on issues of change and innovation. She also has extensive experience with change projects in Jewish organizations and has been intensively involved in several important synagogue change projects. Barry Holtz, a Professor at the Jewish Theological Seminary and a consultant to CIJE, brings knowledge and experience about education in the synagogue setting. Dan Pekarsky, a Professor of Education at the University of Wisconsin and a consultant to CIJE, is an expert in questions of educational vision. He is one of the leaders of The Goals Project, a collaborative effort between CIJE and the Mandel Institute in Jerusalem to create new approaches for helping educating institutions to articulate and realize their visions.

* * *

The time is right for the development of effective methodologies for synagogue change. The demand is there from synagogue and communal leaders. The current projects will continue and new ones will start, but if we cannot build effective change techniques informed by compelling visions of congregations and of Jewish life, we run the risk that the "synagogue change movement" will become a fad that in its disappointments will leave a bad taste for decades. On the other hand, this enormous interest in change is a terrific opportunity. If we can take advantage of this energy and openness to change, we have the potential to create vital institutions that could be at the very center of the revitalization of Jewish life in North America.

PROPOSED BUDGET

	<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>
<u>Personnel Expense</u>			
CIJE Staff	\$36,000	\$36,000	\$36,000
Leadership Honoraria	30,000	20,000	20,000
Researchers/Evaluators	40,000	40,000	40,000
Consultants	10,000	40,000	40,000
<u>Travel</u>			
Researcher Travel	10,000		
Leadership Meetings	20,000	20,000	20,000
CIJE Staff Travel to Site	3,000	5,000	5,000
Retreats		30,000	30,000
Synagogue Meetings		5,000	5,000
<u>Secretarial/Office</u>			
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Supplies	4,000	4,000	4,000
Postage, Misc.	2,000	2,000	2,000
Phone	2,000	2,000	2,000
<u>Publications</u>			
Writing	3,000		2,000
Design	2,000		2,500
Printing	6,000		6,000
Distribution	<u>2,000</u>	<u> </u>	<u>2,000</u>
TOTAL	\$180,000	\$214,000	\$226,500
25% =	\$45,000	\$53,500	\$56,500

We are requesting 25% of this funding from the Nathan Cummings Foundation. We hope to fund the balance in the following way:

Second Foundation Grant	25%
Local Federation	25%
CIJE	<u>25%</u>
	75%

Note that although we have included a budget for leadership honorarium and travel expenses, we are hoping that most of the institutions involved would agree to sponsor the participation of these individuals.

TO: Karen
FROM: Dan

SECOND GENERATION SYNAGOGUE CHANGE PROJECT

A postscript at the beginning What I do below began as a response to a particular problem (identified on this page) and then grew into a more comprehensive suggestion for re-organization which you may or may not think sound. One question in mind is whether the understanding of the project at work in my suggested revisions (for example, the way I understand the relationship between the three elements of the project) is coherent with what you'd like to see happen -- but I guess you'll judge that as you go along. I started late in the evening...it's even later now -- so I apologize if there is some incoherence in my thoughts. I hope it's not helpful.

A problem. It being 11:30 pm, let me begin with my major concern: it feels to me like the proposal as it now stands mixes two different approaches to the second-generation change efforts:

One of these approaches says that we, CIJE, have a Torah concerning successful change, and we think that second-generation change-efforts will be more successful if they conform to our way of thinking.

The other approach says: we're going to bring together a bunch of folks who are relatively sophisticated about change, and together we will scrutinize first-generation approaches to change and, through a process of discussion and debate, will come up with a second-generation approach (which we will then proceed to test out).

To my mind, these two approaches sit uneasily together, and perhaps confusingly, in this document.

A solution. One way out of this problem might be to say something like the following immediately after your announcement that we might be benefiting from building a second-generation approach to synagogue change. [NOTE: WHAT FOLLOWS IS NOT JUST A RESPONSE TO THE PROBLEM IDENTIFIED ABOVE BUT A MORE GENERAL REORGANIZATION. IF YOU CHOOSE TO DIS-REGARD IT, YOU MIGHT STILL BE INTERESTED IN THE SECTION ENTITLED "Our approach to the project" - that's where I try to address tension alluded to above.]

OUR PROPOSAL IN A NUT-SHELL

In the belief that such an effort is of critical importance, we are proposing to develop this second-generation approach to synagogue-change, to pilot it in select synagogue-settings, to systematically study and learn from our experience

and to disseminate the findings. The objectives of the project we propose go far beyond the development of a few great synagogues. They include:

- 1.
- 2.
- 3.
- 4.

OUR APPROACH TO THE PROJECT

Our thinking about how to develop this second-generation approach to synagogue change brings together three significant elements which we believe will, through their dynamic interaction, produce credible and significant results:

- 1) Ideas about effective institutional change grounded in the experience of CIJE staff and consultants facilitating change in a variety of settings, as well as in systematic studies of change processes in different contexts;
- 2) Commissioning a careful review of recent synagogue-change projects, a review designed to maximize our learning from what has already been tried;
- 3) Establishing a leadership-team for this project that includes thoughtful and imaginative individuals with a range of important and complementary competencies who are serving in leadership capacities in the current crop of (first-generation) change-efforts. The job of this team will be to scrutinize the ideas and findings identified in 1. and 2. and together to develop the project's second-generation approach to change.

Each of these elements is fleshed out below.

CIJE's emerging ideas about institutional change, in general, and synagogue-change, in particular. Based on our work and research to date, we believe that effective institutional change requires systematic attention to six elements:

- 1.
- 2.
- 3.
- 4.
- 5.

6.

Based on this model of change and other insights that have emerged in the course of our working with synagogues and other Jewish settings, we have developed a set of, we believe, powerful ideas about how to approach second-generation synagogue change efforts. While the design of the project allows for the possibility that these ideas will undergo interpretation and revision as the work unfolds, we are confident that they will significantly shape the direction of the work.

The leadership-team. We propose to put together a leadership-team that brings imagination, critical thinking, substantial experience with synagogue-change, and to put in its hands the responsibility for jointly developing this second-generation approach to change. Our current thinking is to include the following people:

Reviewing first-generation change efforts. [Here I would include much of what you say under "year 1 workplan, emphasizing both the collection of data and the review of the data by the team. Then, when you actually get to Year 1, I'd say much less - no more than a summary of what's in this paragraph].

TIME LINE FOR THE PROJECT

Year 1 Workplan

etc.

CIJE EXPERTISE

CONCLUSION "The time is right....."

A FEW MISC. COMMENTS/QUESTIONS

"Schrage" is that the right spelling???

P. 1, par. 4. I'd start a new paragraph where you say: "There are reasons to believe that it is." And I might expand the sentence: "There are reasons to believe that creating such synagogues is possible!"

P.1: last parag, first sentence: I'd revise as follows: "with sufficiently developed models to inspire and guide the revitalization of synagogues on a broader scale. In response to this need, around the country there has been a wave of synagogue change projects....."

From: Daniel Pekarsky at ☐ 608-233-4044
To: Daniel Pekarsky, Rm. 716 at ☐ 92721310

☐ 07-28-97 07:04 am
☐ 005 of 005

I myself am uncomfortable with defining education as "the transmission of culture across generations" -- but that's a conversation for another occasion, and I'm confident that this formulation will not do us any damage at all.

It's 1 a.m ., and I'll be in trouble tomorrow if I don't go to sleep.

I hope these comments have been helpful. See you soon.

MEMO TO: Karen
FROM: Dan
RE: Synagogue Change Project proposal
July 24, 1997

Here are my reactions. Overall, I think it's excellent! I do have some suggestions (some minor, some more significant). For what they're worth, here they are:

1. You refer to synagogues as where, ideally, both adults and children are engaged in "serious learning, prayer, and volunteer work". I wonder whether it might be worth alluding to some of the values at work in these kinds of activities -- e.g. spiritual growth, the enjoyment of meaningful relationships in the context of study and volunteer work, opportunities to serve.

2. In paragraph 3 of the document, the one that begins, "Is it possible to change this?" the phrase "Around the county" should be "Around the country", I think.

3. The second sentence, "Around the country, there has been a wave of synagogue change projects that have sprung up in the last 2 - 3 years in response to this need." It's a somewhat awkward sentence and mixes metaphors. I'd suggest something simpler:

"In response to this need, in the last 2 - 3 years, there has been a wave of synagogue change projects."

OR: "Over the last few years, this need has spawned a number of significant synagogue change projects."

4. At the bottom of p. 1 and top of 2, you offer a second-generation approach to synagogue change that would include a number of elements which you list. But you say nothing about the basis for including these particular elements. That is, where does this list come from? Is it based on intuitive impressions of recent projects (impressions that you hope to test through the proposed research)? Is it based on change-efforts in other human domains like business? Or what?

5. Among the elements you mention is one that begins "Clearer specification of the vision...", followed by a phrase "with a stronger focus on building something that works for the "outsiders". I wasn't entirely sure I understood that last phrase: are you speaking about a vision with the power to bring disengaged members and non-members "back home"?

6. While there is a reference to Jewish learning in the list of elements, perhaps a reference to "powerful Jewish ideas" would also be relevant. Something like:

"An emphasis on encountering powerful Jewish ideas which have the capacity to illuminate the process and aims of the change process."

7. The paragraph immediately following the heading THE PROPOSAL:

In that first paragraph I would say a bit more about the conception of the project in preparation for the work plan you propose. In particular, at the end of the first sentence, and before going I would add something like the explains why we begin with a year of data collection and analysis. Something like:

We propose to create a synagogue change project that would meet the above requirements. Our proposal is grounded in the conviction that the second-generation change efforts that we are calling for need to be informed by a careful review of recent synagogue change projects, a review designed to maximize ~~what~~ *our learning* ~~there is to be learned~~ from what has already been tried.

8. Under "Year 1 workplan", in speaking of what we would try to learn, you begin with "Interviews would be conducted to assess the degree of change underway...." I think it would be important to begin with (or at least to include) something like:

"Interviews would be conducted in order to understand how the nature and the aims of the change-process are understood by those engaged in these projects" and then to go on to "to assess the degree....." **That is, there's nothing here about the conception of change or the conception of success (what ideas about a thriving congregation) that's informing these efforts.**

Would it be relevant to include something here about inquiring into the ways in which Jewish learning and Jewish ideas were integrated into the change process?

In the paragraph that begins "Also during the first year the leadership team", the phrase "interpret the research data as it unfolds" is awkward. I'd suggest "interpret the research data as they emerge"

9. In the "Year 2 Workplan" section, in the last sentence, I'd consider changing the word "feedback" to "relay". (I'm not sure "feedback" is a verb.)

10. In the "Beyond Year 3" section, under Objectives, #2: The word "usable" followed by "used" is redundant. My idea: "Creating written materials with the potential to be broadly disseminated and meaningfully used in...."

11. #4 in this section could be more clearly written. I' not sure I get what you're getting at here.

12. The paragraph that begins "The time is right..."

After the clause that begins "If we cannot build effective change-techniques," I would add the phrase "informed by compelling visions of a congregation and of Jewish life"

{JANUARY 29, 1997}

{3}

In the same paragraph, in the last sentence ad would insert the word "vital" in the phrase "create institutions"

I hope this helpful.

FAX TRANSMISSION

CIJE

15 EAST 26TH STREET
NEW YORK, NY 10010
(212) 532-2360
FAX: (212) 532-2646

To: Dan Pekarosky

Date: 7/24

Fax #:

Pages: 6 , including this cover sheet.

From: Karen Barth

Subject:

COMMENTS:

Please review and fax back any changes
or comments today.

SECOND GENERATION SYNAGOGUE CHANGE PROJECT

PROJECT BACKGROUND

CIJE is committed to the revitalization of Jewish life through education. We believe the development of vibrant, relevant synagogues as centers of Jewish learning and living is a critical, perhaps even the most critical, factor in meeting this challenge. We agree with John Ruskay when he wrote:

The synagogue today is in trouble. While ___% of U.S. Jews are members of synagogues, few of these are seriously involved on a year-round basis in the study programs, prayer services and volunteer activities that the synagogue offers. Most view their membership dues as a fee-for-service that buys them access to high holiday tickets, education for their children and the availability of a friendly Rabbi for life cycle occasions. Further, most find these occasional encounters with synagogue to be less than exciting and engaging.

Is it possible to change this? Is it possible to create synagogues where the majority of members are actively involved on a year-round basis? Where both adults and children are engaged in serious learning, prayer and volunteer work? Where even those who have previously rejected organized Jewish life can find something worth coming home to? There are reasons to believe that it is possible. Around the country are isolated examples where a charismatic leader has created a synagogue, Hillel or adult study program that has begun to actively engage people on a large scale. In the Christian world, the megachurch phenomenon has demonstrated that redesigned churches can attract tens of thousands back into church life.

These examples give us hope, but there is still much work to be done to create examples of excellence in synagogue life that can serve as models for the revitalization of synagogues on a broader scale. Around the country there has been a wave of synagogue change projects that have sprung up in the last 2-3 years in response to this need. These include the Experiment in Congregational Education (ECE), Synagogue 2000, the McKinsey Synagogue Project and many smaller projects sponsored by federations, foundations and individuals. These projects while relatively new, have already achieved some successes. However, many of us who have been involved with these projects feel that the success rate and the degree of change has been lower than we would like to see, and that it is time to step back and build a second generation approach to synagogue change that would include:

- ◆ Enough planning time and resources up front for careful design of the change process based on serious reflection and analysis of what is working, what is not working and why?

*Comp 12/24/97
2/24/98*

*spirituality,
meaningful
celebration*

Fortunately,

→ why these?

- ◆ Tougher "admissions" requirements for synagogues
- ◆ Clearer specification of the **vision** of the revitalized synagogue - with a stronger focus on building something that works for the "outsiders" /?
- ◆ A focus on serious Jewish learning as both a vehicle for change and an end product of change
- ◆ More attention to the "technology" of the education of children and adults
- ◆ Extensive skills training for lay and professional leadership built into the process
- ◆ Sufficient funding and a small enough number of congregations to allow for intensive consulting resources to work with each synagogue
- ◆ Synagogues in one geographic area to facilitate frequent meetings and cross-fertilization of ideas

we believe that this project needs to be grounded

THE PROPOSAL

We propose to create a synagogue change project that would meet the above requirements. It would be led by a leadership team of the following people:

<u>Name</u>	<u>Institutional Affiliations</u>	<u>Committed</u>
Karen Barth	CIJE	Yes
Larry Hoffman	HUC/SYN 2000	
Ron Wolfson	UJ/SYN 2000	
Linda Thal	UAHC/ECE	
Isa Aron	HUC/ECE	Yes
Barry Holtz	JTS/CIJE	Yes
Jon Woocher	JESNA	
Rob Waitman	McKinsey	
Carolyn Keller	Boston CJP	
Dan Pekarsky	CIJE	Yes

Year 1 Workplan

During the first year researchers would be hired to visit with the leaders of major synagogue change projects and with the lay and professional leaders of the synagogues themselves. Interviews would be conducted to assess the degree of change underway, the extent to which the process itself helped or hindered change, the major obstacles to change and the key success

2

understand the nature & cause of the change process underway

factors in the cases of success. Cases would be compared to evaluate whether there are any systematic differences between the synagogues that are achieving greater success and those that are less successful. The research would be written up and published during Year 1.

Also during the first year the leadership team would meet 5-7 times to review and interpret the research data as it unfolds and to begin to debate and design a next generation change process. A small working group would meet more often to plan these meetings and predigest the research data. Midway through the first year, we would begin to recruit synagogues and consultants for a project to start-up at the beginning of Year 2. The leaders of the selected synagogues and the consultants would be brought into the design process toward the end of Year 1.

Year 2 Workplan

Year 2 would kick off the actual testing of the second generation process. It is impossible to detail the exact activities of Year 2 ahead of time, since the specifics will be developed during Year 1, but it is likely that they would include some or all of the following:

- ◆ An intensive training program for lay and professional leadership
- ◆ A training program for the consultants
- ◆ A retreat for participating teams from each synagogue
- ◆ 4-6 additional meetings of the synagogue teams
- ◆ Intensive consulting support for the synagogues
- ◆ A travel program for members of synagogue teams to visit centers of excellence.

In addition, the researcher would continue work with the project to ^{relay} feedback information to the leadership team, which would meet regularly to make mid-course corrections

Year 3 Workplan

The Year 3 workplan would likely begin to intensify its focus on internal work with the congregations. Ongoing consulting support and training for the synagogue leadership would continue to be provided and at least one retreat would probably be held for the synagogue team. The process of on-going reflection by the leadership team would continue and the results of the first two years would be written up as a publishable. Also, at least one case study will be developed for use in the training of leadership.

Beyond Year 3

All evidence suggests that three years is too short a time frame to complete a process of synagogue change. We are looking for funding partners who are willing to at least consider a renewal of funding for a second three-year period if the results of the first three years suggest real promise for the future.

THE OBJECTIVES

The objectives of the project go far beyond the development of a few great synagogues. They include:

1. Beginning to create a knowledge base about synagogue change that can inform the thinking of those doing this work around the country
2. Creating ^{appropriately} usable written materials that can be broadly disseminated and used in the training of Rabbis, synagogue lay leaders and others in key leadership positions
3. Helping to push forward the thinking of the key people running major synagogue change projects by providing them an opportunity to learn from each other's experience and to reflect on their own experience
4. Create some diverse models of synagogue excellence that can become resources for the broader dissemination of the ideas and approaches that they have developed. !?

* * *

The time is right for the development of effective methodologies for synagogue change. The demand is there from synagogue and communal leaders. The projects will go on. If we cannot build effective change techniques, we run the risk that the "synagogue change movement" will become a fad that will leave a bad taste in the mouth for decades. On the other hand, enormous energy is there, providing a terrific opportunity to create institutions that could be at the very center of the revitalization of Jewish life in North America.

vital

*informed by compelling
visions of congregational
life*

PROPOSED BUDGET

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