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Goals Project. Coaches agenda, 1995.

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TOWARDS A RECONCEPTUALIZATION OF EFFORT TO DEVELOP COACHES  
--SUMMARY OF HOFFMANN/HOLTZ/PEKARSKY TELECONFERENCE, MAY 3, 1995  
(interspersed with some of Pekarsky's reflections that attempt to  
frame some of the issues)

Introduction. I'm not sure that this discussion is sequenced as well as it might be -- but I felt the need to get this out to you as soon as possible. In the first part of the discussion, I discuss the concerns that gave rise to our conversation yesterday and to the effort to develop a reconstituted plan. In this first "Background" section and the section under the heading of "readiness" I try to sketch out the central issues that have given rise to this situation and that need to be given thought to as we review the wisdom of the reconstituted plan we began developing yesterday and that I've sketched out in the last part of the document.

One last comment: while the discussion below addresses the "Coaches-question," it doesn't discuss a matter that we readily agreed on in our conversation: the imperative need to develop more effective and ongoing communication with our partners in Jerusalem. It would probably be wise for us to move beyond agreement at a general level and to consider concrete mechanisms for doing this.

Background. Our conversation was prompted by strong concerns emanating from Seymour Fox in Jerusalem concerning the wisdom of the kind of seminar for potential coaches that we have been in the process of planning. Seymour had expressed his concerns to Pekarsky the night before and more briefly to Hoffmann in the morning prior to our conversation. Hoffmann and Fox have a longer conversation planned for Sunday, to be followed up by another Hoffmann/Holtz/Pekarsky conference call next Tuesday (2 pm Pekarsky's time). Though final decisions will await that conversation, we were able to make some tentative decisions in the meantime, and these will be summarized below - after a discussion of the issues.

Seymour's concerns were of two kinds: first, he had some doubts concerning the aptitude or readiness of many of those we were hoping to invite for the work we envisioned; second, he was concerned that we don't yet know enough about the work of coaches and the coaching-process to enter into a process of training them. For these two reasons, he felt that the kind of seminar we had in mind was seriously premature and would ultimately undermine the effectiveness of the entire effort.

When I responded to Seymour that we knew that we were still at a very formative stage in our understanding of the coaching-process, and that our sense was that through the projected summer seminar we would further develop our ideas, he expressed skepticism concerning whether the people on our list were the right people if our aim was to deepen our understanding of coaching.

As I understand it, his view is that at this stage we should do the following: 1) hold a seminar this summer for a very small - and elite - group of individuals with whom we can jointly develop and refine our ideas about the nature and practice of what we've been calling coaching; and that, following this, 2) one or two "in-house" individuals, most likely Pekarsky and Marom, would enter into coaching-relationships with a very few institutions as a way of testing, refining, and adding to the understandings arrived at in the course of our study and discussion through the summer. The combination of 1) and 2) might put us in a position in which we are ready to move ahead with the cultivation of coaches, assuming a suitable clientele.

On "readiness". Without commenting right now about whether I think Seymour is right about our readiness to proceed, I want to reiterate here what I said when we spoke about "readiness". Whether or not we are "ready" to train coaches and send them into the field has to do not just with how much knowledge and know-how we have; it also has to do with how "ready" we feel we have to be in order to begin. Our own instinct has been to launch our work in the field at what is admittedly a very formative stage in our understanding of what we are doing in the belief that:

- a. While we lack a lot, we have over the last couple of years gathered quite a few insights concerning the conditions for success, as well as some ideas about how to enter into fruitful conversation with an institution;
- b. We can make valuable contributions even at this point;
- c. Na'aseh v'nishmah! At a certain point, the growth of our own knowledge-base requires taking what we have been thinking about and trying it out -- what Alan referred to as a dialectic between thinking/studying and acting, through which our understanding, skill, and effectiveness will grow.

Seymour's view, I am conjecturing, is that at this formative stage we are unlikely to do much good, and that in fact we might be counter-productive in three respects: 1) we might be make a negative contribution to the institutions we work with; 2) if we prove ineffective, we might generate skepticism or cynicism concerning the worthwhileness of the goals-agenda-- that is, it might give the Goals Project a bad name; and 3) if we proceed into practice prematurely, we may in fact jeopardize the development of the knowledge-base we need.

One could view a plan which says, "A seminar this summer, followed by very selective coach/institution relationships next fall or year (via Marom and Pekarsky)," as a plan which does justice to both views just sketched out. It recognizes the need to engage in practice, but is also cautious about who is to get involved and how extensive our involvement should be at this stage.

I think all of us, including Seymour, are sympathetic to this approach, an approach that is at the heart of the revised plan presented below. Nonetheless, I think there may remain some disagreement about how soon we will be ready to train others and to engage them in the work: our own conversation yesterday tended towards deferring until January what we had intended to do in the summer. Rightly or wrongly, Seymour would, I think, contend that we will not have travelled far enough by January to do something much more significant than we could do in the summer -- even if the January seminar follows on an intensive summer experience and work in the field in the fall.

In response to Seymour's concern over premature entry into a multitude of coaching-relationships this coming year, Alan has voiced a concern that a failure to take on more than one or two institutions in the near term might lead us to be viewed as delivering too little after all the build-up in Jerusalem and beyond concerning the Goals Project. While I don't at this moment want to comment on whether this is in the end a correct judgment, I do want to indicate some counter-arguments for which, as I noted when we talked, I have considerable sympathy (especially b., c., and d.):

a. as noted above, if there is real doubt about whether we know enough to do fruitful work, this is of decisive importance: delivering too little is better than delivering a lot badly and in ways that give us a bad name. More generally, we shouldn't underestimate the newness and the difficulty of what we're attempting and the importance of giving ourselves time to develop a quality product.

b. it's not as though institutions are knocking at our door, demanding that we come through with coaches. We're still at a stage of trying to locate appropriate institutions. So there may not be a question of disappointing the field. In fact, we do not yet know whether there will - in the near future, anyway - many institutions that want to go beyond the seminar-stage with us, or that we will feel good enough about to proceed with;

c. two or so serious coaching efforts, carefully undertaken, studied, and publicized as pioneering and thoughtfully conceived building capacity efforts, could from a PR and from other vantage points, do us a lot of good and undercut any "They're doing nothing!" view;

d. The Goals Project is projected in any case to be very actively involved along other dimensions (to which we need to pay attention soon): namely, the development of goals-seminars -- communal, regional, national, or else tailored to particular audiences (like the Day School or

JCC communities). Similarly, we might conceivably be meaningfully involved with the Wexner folks -- and perhaps we'll be fleshing out some of the stuff on "community vision".

Such considerations lead to the view that if we think a "Go slower" approach makes good sense from the standpoint of the development of the project's knowledge-base, we would not be in political trouble for riding with this judgment: if we suitably publicize what we are doing and frame it in the right way, we are unlikely to be perceived as unproductive. From this perspective, we need not be damaged by a launch that is even slower than the one we discussed yesterday.

#### THE RECONSTITUTED PLAN DISCUSSED AT OUR MEETING

The foregoing indicates questions that need to be seriously considered as we review any proposed plan, including the plan we gravitated towards and agreed to give thought to over the next few days. This plan reflects the shared sense in our conversation that there may well be wisdom in Seymour's observations, as well as our belief that nothing good will come of getting embattled around this. The importance of maintaining the bonds of the CIJE/Mandel Institute community of spirit and effort easily over-rides whatever embarrassment we might suffer for deferring the summer's seminar. The plan is an attempt to steer a course that takes into account Seymour's concerns and other relevant considerations, political and otherwise. Whether it does so adequately is what we should think through over the next few days; and I hope the preceding sections of this report will suggest relevant considerations.

#### THE PLAN

1. A summer seminar (at a time that will accommodate the participants) aimed at a much-narrowed clientele: CIJE's core-staff, Seymour, Daniel Marom, if possible, Scheffler, and perhaps one or more of the following: Gerstein; Toren; Bernie Steinberg; an exceptionally thoughtful and otherwise appropriate Day School director (like Josh); an appropriate Congregational School director (I still would ride with Kyla). It would be important for Pekarsky to spend a day or two prior to the seminar meeting with those who are new to the Goals Project agenda.

This would be a back-stage seminar where we could seriously wrestle with and deepen our understanding of what the work is about and about the way to approach it. The rationale for including the two School Directors is that they would keep us connected to institutional realities and complexities. Steinberg and Toren, in addition to having a serious philosophical bent, know JCCs well and in the case of Toren (at least one central agency).

2. Other individuals that we've informally invited to our seminar

would be informed that the seminar has been deferred. The initial suggestion is that the deferral be until January - though this is a matter that may need more discussion. Alan's suggestion is that we level with them and tell them that, on consideration, we felt that we would be more effective with them if we deferred and did some more preliminary conceptual and field work.

3. Between the summer and the winter seminar, Pekarsky and Marom would do some coaching in institutions. They would keep a careful record of how they proceeded and what they were learning.

4. The winter seminar would build on what we now know and on what we will have learned through the summer seminar and the institution-based work in the fall (which form the basis for something like case-studies to be drawn on in the seminar).

5. The winter-seminar would provide us with a basis for determining who among the invitees seems promising as a coach. By then, with the JCC seminar planned for October behind us, we may be in a position to begin assigning a few individuals to one or more institutions, being very careful not to select anyone in whom we don't have genuine confidence, and also not to pick an institution where the chance of anything meaningful happening is slim. The latter is as important as the former.

(6. Through continuing field work in the spring, we would continue refining our knowledge-base and our know-how and should perhaps be thinking of a summer workshop a year from now to move the work further along.)

**From:** Dan Pekarsky  
**To:** Hoffmann, Holtz  
**Date:** Tuesday, May 2, 1995 11:52 am  
**Subject:** Agenda for our Teleconference

Our teleconference is scheduled for Wed. at noon (my time), 1pm your time. As requested, I'm proposing an agenda for the meeting.

1. Finalizing the letter and the people to whom it should be sent.

Note: Before turning to #2, perhaps go on to #8.

2. How to respond to Ackerman's concern about being free to be with his daughter in the evenings of the seminar.

3. A Gerstein-proposal: we invite her to teach in the seminar for one day (\$500), covering her expenses. We invite her also to participate in the remainder of the seminar as a participant-observer.

4. A seminar-planning schedule including one or more dates for us to meet on seminar outcomes and structure.

5. How to proceed on the Scheffler/Greenberg fronts (with Pekarsky scheduling a trip for late May or first week in June).

6. Agreeing on a strategy for making progress on next year's Goals Seminars (local, regional, and/or national).

7. Strategies for identifying and developing ties to promising institutions (to be coached).

8. Review Pekarsky's statement Pekarsky faxed to Jerusalem on seminar-outcomes. (I'm told the fax didn't come through; you will receive another copy either by email or fax prior to our meeting.) I have not yet discussed the Outcomes-document with Fox and Marom, but already want to add the following:

a. The seminar needs to focus attention on the way the initial contact with the institution is made, what the first steps are -- who one meets with, when, with what information in hand, what questions, etc. This is a crucial step and needs to be very carefully considered.

b. My assumption is that, with one or two exceptions, we will not be assigning these individuals to institutions for the fall. For one thing, most will already have made fall commitments. Rather, assignments will be made in the course of the year to those who, in the light of the summer, seem particularly promising. In the fall, Pekarsky and maybe one or two others will be launching some efforts with institutions -- and these experiences should furnish the material for a second seminar, to be held in Dec. or January for the most promising individuals.

April 23, 1995

Dear Colleagues:

As you may already know, the Goals Project of the Council on Initiatives in Jewish Education is an effort to encourage Jewish educating institutions to become more vision-driven than many now are. We believe that an institution's ability to succeed in this effort will often depend heavily on the availability of sophisticated and talented resource people - or "coaches" - who can pose the critical questions at the right time and suggest fruitful approaches from among an array of alternatives. For this reason CIJE has organized a seminar aimed at individuals like yourselves who seem likely to make first-rate coaches.

We wish to extend to you a formal invitation to participate in a seminar/workshop this summer, intended to engage you in the work of the Goals Project, to strengthen our work with your insights, and to offer concepts, ideas, questions, and approaches that will prove valuable in helping Jewish educating institutions become more goals-sensitive and vision-driven than they typically are. Our hope is that as a result of the seminar, you will grow more effective in helping the communities, constituencies, and institutions you serve to become more goals-sensitive and vision-driven.

Since CIJE is now at a stage at which it will begin working with select institutions around the country on a Goals agenda, we also hope that some among you will become interested in serving as coaches to one or more such institutions. Through such work we hope to help these institutions grow, as well as to develop an ever richer knowledge base concerning the best ways to encourage more fruitful attention to goals in the life of educating institutions.

The seminar/workshop is scheduled for July 30 - August 2. For those of you coming from outside the Cleveland area, CIJE will cover your transportation and lodging costs. Details concerning the content and schedule of the seminar will follow shortly.

One or another CIJE representative has spoken with most of you by phone concerning your possible participation, and we are thrilled by the positive response we have been getting. Please fill out and return the attached sheet to confirm your participation at the seminar. It should be returned to CIJE no later than \_\_\_\_\_. We look forward to hearing from you.

Sincerely,

Daniel Pekarsky

# Goals Project

## Couch / Enshitters

① Let's just identify promise  
folks !!

② a) I'll draft letter

b) Need to identify  
time →

Participants →  
Pre-CATB  
Boston

(2) Need to id. watershed

(3) Community -  
Seminars:

Low profile?

(4) The JCC.

# Handbook

Lewis

Corn

Barth ??

Senge

Schmin

Witt

A) Articles

B) GP - Statement

C) Ed. your Papers

D) Questions

Levels

Strategies

# Coaches

- Lifschitz \* Marci-Balman  
Dick
- Toren \*
- Chervin \* Karen Sobel
- Finkel \* Harvey Shapiro  
Susan Shultz
- Epstein \*
- Diane Lambert \*
- Jeffrey ? ? \*
- Betsy Kato \*
- Herdman \*

Day 1: Initiation into Goals Project

Day 2: Describe an Initiation

— how cut in

— a Case-  
Study!!

Change - Strategy

4 days before CATB

