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**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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Goals Project. Gerstein, 1994.

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September 4, 1994

Dear Alan, Barry, Danny, Gail, Ginny, Seymour and Shmuel:

In response to your request, I would like to report to you on my conversations with Amy Gerstein - the coordinator of for all Coalition of Essential Schools activities on the west coast and the person who developed and implements a training course for those who facilitate the Coalition's change processes in schools. After receiving materials from Barry on the massive critical study of the Coalition schools and from Amy on the Coalition's equivalent of a training course for coaches (called the "trek"), I had a chance to talk to Amy. At first I grilled her with questions about the Coalition and the trek and then I told her a bit about the goals project and let her respond. My primary concerns were:

a) to determine what we could learn from the experiences of the Coalition about major obstacles in creating change through work on goals with schools; is there some wisdom here which could provide us with "short cuts," as it were, as we also consider how to work with settings in Jewish communities through intermediary "coaches;"

b) to determine to what degree Amy was a person who might be a resource for the goals project; as I saw it, besides just getting a sense of her background and experience, this depended on whether or not she had:

- a genuine interest in Jewish education and an honest appraisal of what she does and does not know about it;

- a dogmatic loyalty to the Sizer approach to change or an open-minded capacity to bring her expertise to bear on settings and change approaches which are different or even opposed to the Sizer/Coalition approach;

The following is a point form summary of what emerged from our conversation:

1) The Coalition does not intervene directly into schools. Rather, they make their program of change known to schools and accept proposals to work together. As we already know, this program is based on nine specific goals which Danny Pekarsky would perhaps call "instrumental" rather than "substantive" goals - eg. "change the ratio of teachers per student" rather than "develop capacity to see moral issues in terms of Talmudic discourses."

In order for the Coalition to agree to work with a school, they demand 75% consensus among all the constituents of the school (board, administration, staff, etc.) for change according to Coalition program. Then, they invite 3-8 people from within the school to work with them for a period of a year so that they can discover, together with Coalition

"facilitators," how to implement the change process effectively while they themselves are carrying it out. This facilitation process is really what is called the "trek." It costs the school \$450 + room and board for a summer course in order to participate. Representatives from clusters of two to four schools from the same area do the trek together - each are called "critical friends."

As stated above, the trek is an ongoing training course which facilitates, accompanies, monitors, and provides consultation to the change agents from the school. The trek begins with a summer course and continues throughout the year with a series of visits/in-service days with the trek facilitators as well as visits/interchanges with critical friends. Schools getting involved with the coalition can do so on first on the level of "exploring," then as participants in a "network," and finally as full-fledged "members." Hence, the change process really continues after the one-year trek process.

2) Amy makes a number of important points here concerning what has emerged from the Coalition's experience. In her estimation, it is indeed possible to make a significant and transforming impact on the culture of the school with this kind of process, even in one year. She claims that the critical studies of the Coalition were extremely useful in helping them further develop their approach. These studies were done five years ago and the Coalition has incorporated much of what is learned from them into their approach.

However, Amy claims that there are a number of preconditions which the Coalition discovered as critical for success. First, the schools have to want change if it is really going to happen. Bringing the trek to the school failed. The school really has to ask for it from the start. This is the reason for the 75% consensus precondition and for the demand for the change to be facilitated by representatives from within the school. The aim is to give the school "ownership" over the change process while at the same time helping from outside to, in essence, subvert what it has been doing until the present. This is an "in vivo" transplant, not an amputation which is succeeded by the addition of a new artificial arpendage.

Keeping with this understanding, the Coalition demands that the team of representatives in the trek minimally include the principal, a school administrator and one teacher (note: no precondition for lay representation). Sometimes, argues Amy, it is worth compromising on the principal in order to bring the schools to the discovery that change cannot really take place without the principal being in on the process. Often, schools bring many of their staff. There is, in some cases, a third person called a "coach" who is an outside consultant to the school, well versed with the Coalition program, and is available to the school for the

change process. Note: there is a very significant additional work demand made upon the school representatives who work on the trek teams (eg. after hours and Sunday meetings). According to Amy, these people get no extra salary. The school has only to arrange for them to be replaced when they go to a trek seminar or visit schools of critical friends. Yet here too, an attempt is made to arrange for these events in off hours.

At the same time, in many cases, Amy suggests bringing those who "resist" the Coalition program into the "trek" team so as to develop an honest transformation process. This is an example of a new strategy developed in light of the findings of the report. The point which Amy stresses is that the mandate for change be made explicit. She does not attempt to get around opposition only through "top-down" force, but also to coopt the opposition into the synergistic change process. Both "top-down" force and "synergy" are critical to success. For "synergy," Amy sees as important the transformation of the school into a center of inquiry or a learning environment. The price, she argues, is that the process gets slowed down. This is a major difference between the kind of change processes which are generated by people with the business world and that which is particular to education. It takes alot longer to change a culture in a school than in a business. When the "client" is the community and the student, and when success is not measured in terms of "profits," the change process is much different.

3) Amy has had a pioneering role in setting up the training process for trek facilitators. Candidates are usually, but not always, people from within the Coalition world. The "facilitator most likely to succeed," according to her, is a person who has had classroom teaching experience and has also moved into an administrative position. This experience should have given the candidate for facilitation a real and intimate knowledge of the context in which introducing change will take place. This is something which is often lacking to business consultants and which explains, according to Amy, their impatience with change processes in schools.

On the other hand, she claims that a critical skill for facilitation which is not always present with school people is working with and creating consensus among adult groups (I understood this as the capacity to move from a mode of teaching children to working with adults). Also, alongside the demand for school experience, she sees a genuine eagerness to learn as a precondition for successfully learning how to facilitate the trek.

Amy herself set up and delivers the training seminars for Trek facilitators. Among her counterparts, she is known as being critical of the approach which sees it possible to successfully train facilitators without a practicum element. Those learning to facilitate, she argues, must be given a

chance to observe and study a trek while it is being carried out.

4) Amy has been in on the Coalition from very early on and is one of its major staff people. She is responsible for the whole Coalition operation on the west coast. At the same time, she is doing a doctorate with Lee Shulman in which she is assessing the Coalition change method. In speaking to her, I found her not to be dogmatically wedded to this approach. She seemed to have a sense that the realities of schools will not be easily addressed by any formula and was, I felt, more interested in the larger picture than in a "party line."

Amy was very interested in our conception of goals and, despite its obvious critique on that of the Coalition, was not closed in any way to considering a special change methodology for our approach. She seems to have a personal bent against the gross "process" approach to "vision processes" and discusses the uniqueness of change in educational settings in a chapter in her doctorate. She also thought that our general approach with the communities so far was wise, and stressed the importance of both not promising too much in advance and of coopting lay leadership from the beginning of the process. She was somewhat critical of the possibility of working with one model school, because it could estrange rather than motivate other schools from the process we were suggesting. She intimated that schools learn a lot from each other when they are involved in similar type change methodologies (as if they can admit to others what they cannot admit to themselves).

At the same time, though she had some experience giving consultation to a board of Jewish education on the east coast, Amy openly and unabashedly suggested that she would need to learn a lot about the content and context of Jewish education in order to be able to make a useful contribution. She gave me the clear message that she is very interested in being part of an effort in Jewish education.

5) My own feeling was that Amy's voice could be very significant in any CIJE deliberation on the goals project. More than asking her to teach us about the strengths and pitfalls of the Coalition experience, I felt that she could enter the goals project deliberation critically and creatively without bringing in dogmatic Coalition prejudices. Just how far this could go was difficult to tell in this limited communication. A major problem, of course, is that she would need to be educated about the context and content of Jewish education. This may be of relevance to the Mandel Institute's "personnel project." Also, I do not know how her relationship with the Coalition or with Lee Shulman affects the possibility of recruiting her in any way to the goals project.

At the very least, I think it would be worthwhile for any or all of you to meet with Amy and to consider how she might contribute to the goals project. At our last meetings, some of you expressed concern about how to set up a course for goals project "coaches." Amy could be part of an effort to think about this critically and constructively, as we continue to work together and with SF on formulating the change methodology we are assuming at the basis for the goals project.

I told Amy that I would share the content of our discussion with the CIJE and would like to continue picking her brain on the phone (415-326-4686), e-mail etc. It may be important for you to know that she will be on the east coast some time in November visiting her family. Please let me know what you think about all this so that we can coordinate a response before talking to her again.

Shana Tova to all of you,

  
Daniel Marom

Intro. of Task and  
Change Agent.

- a. Blameless Critique (growth- "want more" vs. "fix it").
- b. Be transparent.

*-Criteria for evaluating receptivity.*  
*-Appropriate entry point(s).*  
*-Deception issue, 'why not...'*  
*-How to get people to accept growth model.*

Creating Climate for  
Reflection.

- a. Creating trusts/relationships.
- b. Engendering support from top leadership.

Roles of Change Agent.

- a. Insider versus outsider.
- b. 'Authorship' not authority.
- c. Coordinator
- d. Resource ...

*-Principal vs. outsider vs. team as 'coach'.*  
*-Principal knows entire culture - push on visioning issues (Marom - Lehmann)*

Engagement in Visional  
Discourse.

- a. Probing questions.
- b. Reflecting vision you see.
- c. Introducing visioning resources

*- How much can/do you "push" people (need to motivate vs. undermining work/shut down).*  
*- When/to whom/what introduce philosophical material.*  
*- Content based goals/ "essential motifs" of Goals Project.*

Getting Into Culture

- a. Meet with all 'stakeholders'
- b. Familiarizing with curriculum, policies, etc...

*-Are all stakeholders involved in ongoing way?*  
*-How to insure?*  
*-Problem of pre-deciding directions (Lehmann school)*

Developing Goal  
Statements.

- a. Write goal statements.
- b. EDITOR to collect and revise statements.

*- Reculturing vs. "freeze" model.*  
*- What would vision driven institution look like?*