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Lead communities project. Milwaukee. Leadership project, 1996
February – 1998 May.

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May 14, 1998

Copy for Don

Elie Holzer
495 Boylston St./ Apt. 2
Brookline, MA 02146

Dear Elie:

Here are selected materials from the Milwaukee experiment in which Dan and I were engaged.

Background: In the spring of 1996, a planning team of lay leaders, including several who had been involved with CIJE for years as part of the Lead Community initiative, invited us to help them create a seminar whose goal was the nurturing of lay leaders specifically on behalf of Jewish education in Milwaukee.

Although the seminar has not come to pass, we learned an enormous amount about the relationship between learning and leadership as we attempted to move the process forward in partnership with them.

Of my voluminous file, I've selected some documents that may stimulate your own thinking. I've annotated the documents and put them in chronological order. If they are still confusing, please call and I'll attempt to clarify.

Karen thinks the study group is a splendid idea. Dan is eager to participate by phone each week and Barry in person. I have not yet had a chance to discuss it with the others. I did have a very interesting conversation with Karen in which she told me that she had met with former McKinsey colleagues who told her that the current cutting-edge in leadership development is the "psychological school; transforming your inner person; bringing out an individual's leadership qualities." Although this may be merely the trend of the moment, it happens to align with my own intuitive convictions about leadership and "a Jewish approach to leadership."

It also seems more harmonious than some other approaches with the question that interests Dan and me: What kind of Jewish education would it take to nurture people who would be capable of leading their communities toward deeper, richer, more important Jewish education? What kind of text study would be part of that education?

Looking forward to exploring these questions and creating a framework for next year that would enable us to think about those kind of questions in a more informed way.

I'm sending Dan a copy of this letter and the materials. I hope the three of us can sit together on the first day of the staff retreat--perhaps over a meal--and at least schedule a planning meeting before the summer.

Nessa Rapoport

from the *Shot*

Haran § 226 and 267), written by Rabbi Nathan.

Rabbi Nahman said that there are rabbinical masters who are famous for their knowledge of the Torah. They possess a wide knowledge of the texts and the interpretations given by their predecessors. But, precisely, as a result they are incapable of innovating (*lehadesh*) in the Torah, because they are too knowledgeable.

When one of these masters goes to innovate something, his immense knowledge immediately disturbs him, closes him up, and he begins to formulate numerous preliminaries and sum up the synthesis of his knowledge on the subject, and, as a result, *his* own words get mixed up and he cannot pronounce any interesting new word.

When someone wishes to innovate new words (new meanings), he should limit his knowledge (literally: accomplish the *Tsimtsum* in his mind), that is to say, evacuate, not hurry into the known preliminary considerations that confuse his mind and that are not necessary for innovating. He should act like someone who does not know and only then can he progressively, and in order, innovate new meanings.

812-532-2646
Nessa Rappaport

MEMORANDUM

DATE: April 4, 1997
TO: Nessa Rappaport, Dan Pekarsky, Ruth Cohen
FROM: Susan Shevitz
RE: Lay Leadership Development in Milwaukee

I want to respond to our telephone conversation and to Ruth's budget in a way which will help move the project forward. I'll lay out a few principles which are important to us at Brandeis and which I think are compatible with the work you've already done. I'll react to the budget Ruth suggested from that point-of-view. I've discussed the project with others on the steering committee of our own internal planning process and there is interest here in it.

A leadership curriculum/program would need to emerge from in-depth knowledge of Milwaukee and its needs, the Jewish value concepts which shape an understanding of leadership, contemporary realities, historical precedents and the particularities of Jewish education. It would be interdisciplinary. It would be "practical" (not in the sense that it would be designed to "solve" immediate problems but rather in the sense that the participants will be supported in their attempts to apply concepts and information to their own leadership work). This curriculum/program would be concerned with the lay leaders' own spiritual/Jewish development as well as their understanding of particular content. Fostering supportive personal relationships among participants and between participants and faculty will be important; they will learn with and through each other. Since so little is really known about lay leaders and leadership in Jewish education, this will also be an opportunity for faculty to learn more and feed new information and insight back into the community. Thus research might be an important component of the project.

Another aspect of this project is follow-up: it will work with people over extended periods of time although the activities will change over time. For example, if the participants are "in" the more formal part of the program for two years (retreats, classes, site visits, etc.) then they would progress into other stages. The second stage might involve additional site visits and some policy analysis which has salience for the wider community. A third stage might involve the leaders in some national deliberations and activities as well as local ones. These ideas are only meant to be suggestive of the underlying principle that leadership has to be cultivated and developed through several stages. It is not a one-time investment.

The approach we are envisioning has relevance beyond Milwaukee. It can be seen as a pilot project which will yield an approach to be replicated elsewhere.

The possibility of pairing communities has some educational merit. Participants will be less constrained by one community's realities as they learn about others' approaches.

So how could such a project be organized? A planning team would need to involve lay leaders from the community as well as academics and educators. I could see a core planning team (4-5 people), headed by a Brandeis faculty member, which brings its plans to a larger group in Milwaukee before moving too far. The core planning team would have expertise in leadership, Judaica, education, adult learning and community organization. Consultants would be used to develop specific content and approaches.

What kind of timetable would be viable? While I appreciate Milwaukee's desire to move forward expeditiously, it sounds as if it won't be able to really move on this until the new staff and structures are up and running. This will take some time. Similarly, the internal demands here mean that we could phase in our work over the next several semesters. In concrete terms this probably means that in autumn 1997 the planning work with CJE and the community could continue on a limited basis but that the core planning group wouldn't start to meet until spring 1998 with a "kick-off" retreat planned for autumn 1998. This timetable may be too ambitious since it assumes that money and commitments fall into place quickly enough to handle the details of hiring some people for autumn semester. . . . The idea Ruth proposed, of a point person in Milwaukee, is also essential. This person would have to have excellent conceptual and organizational skills and be a well respected member of the community.

In general, the budget presented is too lean: faculty time is more costly; there's probably more r&d which needs to be figured in. Once we have some general agreement about the plans, we could more easily project a budget. But now I wanted to at least react to the ideas we've discussed and try to push them further along. Let me know what you think.

March 11, 1997

FAX No. 414-390-5782, Phone No. 414-390-5700



Fax



To: Leadership Dev. Action Team **From:** Ruth Cohen

Fax: _____ **Pages:** 2 (Includes Transmittal)

Phone: 414-390-5724 **Date:** March 11, 1997

Re: _____ **CC:** _____

- Urgent
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• **Comments:** TO: Daniel Pekarsky (608-262-9074)
 Nessa Rapoport (212-532-2646)

March 11, 1997



MILWAUKEE JEWISH FEDERATION

MEMORANDUM

DATE: March 11, 1997
TO: Leadership Development Action Team
FROM: Ruth Cohen
SUBJECT: Update

Since our last Action Team meeting, I have followed up on the two issues we have discussed:

1. Focus group/demonstration lesson.
 - Both Nessa and Danny are not available for a March session.
 - Arna Poupko is unable to arrive at Milwaukee a day earlier (March 24th) and, therefore, will not be able to participate in our session.
 - Jim Zucker, Jeanette Peckerman and I recommend that the focus group session will be postponed until May so that it can be properly planned.

2. Hiring a Project Coordinator.
 - Arna Poupko is still interested in further exploring this opportunity. I told her that we are also considering working with Brandeis University. I promised to contact her as soon as I have more information.
 - I have had several conversations with Susan Shevitz from Brandeis. She is very interested in our project but had no time to think of the logistics of this partnership.
 - I have scheduled a telephone conference call with Nessa, Danny, Susan and myself to discuss this project and to determine the feasibility of working with Brandeis. This conversation will be held on March 18th. I will report the outcome of this conference call to you as soon as possible.

The MJCCR, through its 1997 Purim Mitzvah Project, will be collecting items for needy children from March 16th - March 26th. Acceptable items include: new baby/toddler clothing, toys, blankets, formula, shampoo, etc., and gently used clothing. Donated items may be dropped off at the Federation office during the collection period. For more information, call 390-5777.



Commission Co-Chairs
Jane Gellman
Louise Stein

Project Director
Dr. Ruth Cohen

MEMORANDUM

DATE: December 20, 1996

TO: Members of the Leadership Development Action Team

FROM: Jeanette Peckerman and Jim Zucker, Co-Chairs

SUBJECT: Next Meeting

The next meeting of the Leadership Development Action Team will be held on:

Monday, January 13, 1997
7:00 P.M.
Congregation Beth Israel (Library)
6880 N. Green Bay Avenue

We will continue working on the development of the curriculum. Enclosed are the Summary Notes from the last meeting.

Please complete and return the enclosed card indicating your availability.

/map

Enclosures



LEADERSHIP DEVELOPMENT ACTION TEAM MEETING

December 16, 1996

Commission Co-Chairs
Jane Gellman
Louise Stein

Project Director
Dr. Ruth Cohen

SUMMARY NOTES

Present: Jeanette Peckerman and Jim Zucker, Co-Chairs; Jane Gellman, Chip Mann, Mitch Moser, Louise Stein; Staff: Ruth Cohen, Margie Stein.

I. WELCOME

II. CURRICULUM DEVELOPMENT

Louise and Ruth presented a summary of conversations they held with Nessa and Danny:

- Both Nessa and Danny view our effort as being very important and, therefore, made a long-term commitment to working with us on the development and the implementation of the project.
- Convene a work group that will work on the development of the outline of the curriculum and the specific content of each of the 16 sessions.
- Explore the possibility of hiring a lead curriculum developer/lead teacher to guide this effort.

The following is a list of selected comments:

Mitch: How much input would instructors need?

Louise: If you leave too much room for instructor's input, you may not get the product you expect.

Jim: Instructors need to be part of the planning group.

Louise: The work group can start laying out core ideas, then break it down to components of 5-6 sessions each, then identify individual instructors who will provide input on each component.

Jane: Ultimately, the sessions will be influenced by the instructors.

Louise: We need the input of participants before finalizing the curriculum and the format of the seminar.

Ruth: We will gain some insight on participants' preferences through the focus group.

Louise: Danny thought that we should use the focus group for market research, not for recruitment.

Ruth: The focus groups will always serve as a recruitment tool whether we acknowledge it or not. The participants in the focus groups are potential candidates for our seminar, and their impressions from the introductory session will influence recruitment effort.

Jim: We need to present focus group participants with a clear description of the seminar. Perhaps, we should convene the groups later, after our work group has developed the curriculum outline.

The work group may meet during January-February; focus groups - beginning of March. We need to move on; if the development process will be prolonged, we will lose momentum.

Jeanette: As a potential participant in the seminar, I will need to know specific information about content, instructors, etc.

Jane: We may talk to Bert about a grant to hire a lead teacher/curriculum developer to work with the work group. Betsy Katz may be a candidate.

Jim: Let's invite Betsy to attend our next meeting.

Mitch: We may need to talk to school principals to find out what they would need in order to enhance the effectiveness of their boards.

Jane: We may consider making a presentation at the Principals Council; we may also ask them for five names of potential candidates.

Jim: We need input from other people. Maybe Jerry Kaye should also be invited to the meeting.

Decisions:

1. Invite Jerry Kaye and Betsy Katz to the next meeting.
2. Convene a meeting of the Action Team, Danny, Nessa and two guests.
3. Jim, Louise and Ruth will work on the details of the focus group.
4. Plan a meeting with the principals at the January or February Council meetings.

/map

SUGGESTED TOPICS

Don's formulation of a
curricular framework
(rooted in all our previous
work), which they liked.

LEADING JEWISHLY

Images of leadership: Different understandings of the nature and tasks of leadership and of the leader's relationship to his/her community.

Jewish texts and ideas in the leader's work; sanctioning the leader's right to speak in a Jewish voice

Critical Leadership challenges: Wearing the community hat, building support for innovation, resistance, factionalism, responsible delegation, succession.

Ethical dilemmas of leadership (for example, honoring the individual vs. the needs of the group).

Visionary ideals: what does our tradition tell us about the ideals that should inform the leader's efforts.

In the footsteps of Solomon: Perspectives and criteria - some basics of thoughtful deliberation over educational priorities and policies.

Lay Leaders working with other leaders (rabbis and educational professionals): tensions, opportunities, division of labor.

VISIONS OF COMMUNITY

Powerful visions of a thriving Jewish community and the implications of each for education and leadership.

Visions of tomorrow and our work today: what would a revitalized American Jewish community look like, and how will our answer to this question shape the work of leading.

EDUCATIONAL EXCELLENCE

Powerful ideas (from Jewish and general sources) about the conditions of quality education.

Images of excellent educational institutions - and what makes them so!

Reaching for excellence: educational innovation - opportunities and cautions.

CONCEPTUALIZATION OF MILWAUKEE LEADERSHIP DEVELOPMENT SEMINAR
October 1996

AIM: provide lay leaders of Jewish education in Milwaukee with a sequence of personally rewarding experiences that will deepen their understanding of their challenges, that will enhance their ability to address those challenges thoughtfully and effectively, and that will build among them a sense of collegiality that forwards their shared and individual educational agendas.

DURATION: Approximately 16 monthly sessions spread out over a two year period.

FORMAT: Opportunities to wrestle with powerful Jewish ideas drawn from classical and recent Jewish sources, powerful ideas about education, and powerful ideas about leadership. Organized around several critical themes, substantially grounded in concerns of participants.

Examination of each critical theme includes the following elements: identifying participants' pre-existing ideas and concerns; powerful Jewish and other ideas that illuminate the issue; the practical implications of these ideas for the work of leaders; skills needed to handle the issue more effectively.

Seminar includes an experiential dimension (for example, field trips to sites of excellence), a personal dimension (that is, opportunities to use participants' own past educational and leadership experiences as vehicles of serious learning), and opportunities to analyze true-to-life or actual cases that capture challenging situations that leaders face.

THE SUGGESTED FRAMEWORK: The table of contents/list of topics summarized below (See next page) reflects various conversations with the planning team. It is intended as a rough framework to guide next steps and to be revised and refined as the effort proceeds.

My ideas, sent to Don,
for a possible model
session with the planning
team.

Leadership Development for Jewish Education

Milwaukee: 10/31/96

Leadership for Our Day:

Finding Our Way: pp. 3-14.

The Way of Man: pp. 15-18; p. 29.

“Everyone must have two pockets, so that he can reach into the one or the other, according to his needs. In his right pocket are to be the words: ‘For my sake was the world created,’ and in his left: ‘I am dust and ashes.’” (Quoted in Martin Buber, *Ten Rungs: Hasidic Sayings* (Schocken Books), p. 106.

Leadership on Behalf of Learning:

“The study of Torah ranks above the building of the Temple; the study of Torah ranks above honoring father and mother; the study of Torah ranks above the saving of lives; Torah ranks above priesthood and royalty.” (B. Meg. 16b; B. Er. 63B; Avot 6:6)

“Rabbi Simeon said: “There are three crowns: the crown of Torah; the crown of priesthood; and the crown of royalty. But greater than all of these is the crown of a good name.” (Avot 4:13)

What does the conflict between these two passages signify about leadership?

Communal Responsibility and Pluralism:

“Rabbi Joshua ben Levi said: “When a man walks on the highway, a company of angels goes before him announcing, ‘Make way for the image of the Holy One, blessed be He.’” (M’Teh. 17:8; Det. R. 4:4)

“Ben Azza used to say: ‘Despise no man and consider nothing as impossible, for there is not a man who has not his hour and not a thing that has not its place.’” (Avot 4:3)

“No punishment may be imposed unless a warning preceded it.” (B. Yoma 81a; Sif. Deut. 173)

How can we see the divine image within each of the many conflicting, contentious voices in a community? How can we move an agenda forward while granting each person “his hour and place”? If we are forced to make tough decisions, what might it mean to precede them by “a warning”?

Finding Our Way, pp. 136-158.

Sustaining Large Vision in the face of Daily Decision-making:

Inevitably, there is tension between the large vision that inspires people to give their wisdom and time to the community and the substance at most meetings of what must be debated and decided upon (allocations, recruitment, benefits, parking spaces, logistics). There may even be tension between studying “large Jewish ideas” and acquiring the managerial skills to exercise sound leadership.

This tension may correspond to debates among commentators between the importance of study and the importance of practice, which we could study.

“Pedagogic Content Knowledge”

This influential concept in general education distinguishes between learning a subject as a student, “for its own sake,” and learning it for the sake of teaching it. It postulates that the student who learns in order to teach must learn in a different way.

Might that not be true of Jewish leadership as well? In order to “lead Jewishly,” perhaps Jewish texts must be studied differently than if they were studied “for their own sake.”

On Leadership vs. Management

Dr. Terrence Deal has written extensively on “The Four Frames” of organizations:

1. The structural frame, which emphasizes productivity, clarity of goals, and coordination in the organization.
2. The human resources frame, which highlights the importance of needs and motives, and therefore stresses the creation of a trusting, caring work environment, participation and decision-making.
3. The political frame, which points out the limits of authority, the scarcity of resources, and the inevitable jockeying for power. Goals emerge from bargaining and compromise among competing interests rather than from rational analysis at the top.
4. The symbolic frame, which centers attention on symbols, meaning and faith. Every human organization creates symbols to cultivate commitment, hope and loyalty. Stories, metaphors, ritual, ceremony, and play make the organization become a way of life rather than merely a place to work.

Leaders, too, have frame orientations. Typically, people prefer one over the other. Helping people reframe a situation usually allows new, more effective ways to deal with highly perplexing situations.

Deal and his partner, Lee G. Bolman, have studied many kinds of leaders, in business, higher education and health care; they have also studied school principals. Principals, particularly in the U.S., show a strong preference for the human resource and structural frames, in that order.

How all leaders think about their work is related to how well they perform. The structural frame dominates ratings of effectiveness as a manager, while the symbolic frame dominates ratings of leadership effectiveness. Successful leadership depends on the ability to apply multiple frames to complex situations and decisions. (Extracted from "Everyday Epistemology in School Leadership: Patterns and Prospects," April 1992.)

Lay-Professional Partnership

CIJE is currently developing a two-day institute to take place in January 1997 for lay and educational leaders involved in Jewish schools or federations committed to Jewish education. That curriculum will be available to us--as will feedback from the institute itself.

A Community of Leaders

"An underlying message in Terry Deal's theme of the importance of the symbolic, cultural and political aspects of leadership is building a community of leaders. We cannot raise the stakes and quality of Jewish education according to functions: We cannot make a difference by focusing only on principals, bureau directors, or community leaders. Rather, we must create the conditions to enable teachers, principals, parents and lay people to come together to forge the way in Jewish education." (Ellen Goldring, comments at the CIJE Board Seminar, Oct. 5, 1994.)

The Goals of Jewish Education

"Our goal should be to make it possible for every Jewish person, child or adult, to be exposed to the mystery and romance of Jewish history, to the enthralling insights and special sensitivities of Jewish thought, to the sanctity and symbolism of Jewish existence, and to the power and profundity of Jewish faith." (Professor Isadore Twersky, *A Time to Act.*)



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Milwaukee Leadership Seminar

Daniel Pekarsky/Nessa Rapoport

The curriculum for this seminar will be organized around powerful ideas-- ideas about the nature of Jewish life, about education, and about leadership. Integrating the Jewish and general components of the program, the seminar will enable participants to emerge with a deep understanding of critical issues in Jewish education in order to be informed champions of the kind of innovative teaching and learning that forges community. Participants will know what questions to ask of proposed and existing educational practices; they will also be better able to weigh their merits and flaws.

The first part of the program will have three major themes: **Change; Excellence; and the Jewish Future.**

Change

From personal change to communal change: The theme of change--or growth--is at the heart of Jewish education. What kinds of change would we want to catalyze and why? What powerful ideas about the meaning and purpose of Jewish life can illuminate our thinking about this question?

Additional questions to be addressed include: Can teaching change lives? What is the nature of the extraordinary commitment of Jews to literacy and learning? How can our own experiences in general education contribute to our ideals of Jewish education? What would a revitalized community look like? How has dynamic leadership led to change in the past--and what role might it play toward a new vision? What does Judaism have to say about an individual's power to make a significant difference?

An important component of this theme will be: How can we learn from educational failures of the past, in both general and Jewish education? Why do change efforts so often fail? How can we avoid some of the pitfalls and resistance to change that have been well documented in general education?

Resources: Suggested readings to include: Seymour Sarason on "the problem of change" in general education; a case study of a "vision-driven" institution in Jewish life, such as a revitalized Hillel or a new community school; Jonathan Sarna's essay, "A Great Awakening: The Transformation that Shaped Twentieth Century American Judaism and its Implications for Today."

Exercise: In pairs, we will consider a proposal for Jewish educational change. What are the criteria for assessing its strengths and possible pitfalls? How can we know a good idea from a weak one? What are the financial implications and how feasible will it be to implement the idea based on the estimated budget? Will this idea lead to genuine improvement? How will we measure its impact? (This exercise can be repeated in the closing session of the seminar as a lens for measuring our own change.)

We will view the documentary “28 Up” by Michael Apted. This film traces the evolution of several British children every seven years from the age of seven and shows the influence of their varying education and environment on the kind of adults they became.

Excellence

What does educational excellence look like? We will examine models of visionary ideas and their settings in general and Jewish education. Sessions will include looking at examples of what is considered excellent teaching and analyzing them for criteria we might apply to current educational settings as well as to ideas for the future.

Resources: We will invite four transformational educators and learners in Milwaukee to “testify” about the educational experiences that have shaped them. We will also read the “Best Practices” volumes in Jewish education (Early Childhood; Supplementary School; JCC). We will invite Deborah Ball and/or Sharon Feiman-Nemser to speak about the Teacher Educator Institute and the cutting-edge of professional development for educators, including Deborah Ball’s work in mathematics reform and its implications for Jewish teaching.

Exercise: We will make a site visit to a non-Jewish education setting of excellence in Milwaukee and speak to the educators about their vision and its implementation. We’ll then look at Jewish educational settings, formal and informal.

The Jewish Future

We live in the most embracing society of any diaspora in our history. The conditions of Jewish life in North America offer unprecedented opportunity to live a rich, engaged Jewish life--but also to leave the Jewish community entirely, without adverse consequence. How can Jewish life be more vital and more enticing in an era of choice? What are those who leave the Jewish community seeking that they have been unable to find within? What role might Jewish education play in reversing the trend lines? What role might our institutions--schools, JCCs, synagogues, camps--play? What can we learn about currents in American society that can enrich our understanding of the challenges facing us? What might a renewed Jewish community contribute to America?

Resources: Arthur Green's essays on spiritual quest in North America: "Judaism for the Post-Modern Era" and "Restoring the Aleph: Judaism for the Contemporary Seeker." Menachem Brinker's work on a secular vision of Jewish education. Michael Rosenak's essay on whether there can be a community-wide vision for Jewish life and education.

Exercise: At this point the group would go on a two-day retreat, to which we can invite a number of teachers and leaders from across the country who have been intensely involved in creating a range of visions and institutions to address the Jewish future.

Other Themes for Consideration

Arts and Education: What can we learn from the imaginative arts that is essential to the way we think about problem-solving and education? Why are Jews so deeply committed to the American arts as artists, patrons and participants--and yet Jewish educational institutions do not reflect the best capacities of the arts? What would it mean to focus educationally on the development of creativity and imagination as resources for transforming Jewish life?

The Jewish Family: What kind of Jewish men and women do we want our children to become? How do our educational settings prepare children, as well as young men and women, to love, work, and create community? Are the models they transmit authentic and useful for the coming century? What can we learn about how families transmit culture? What is the face of the Jewish community for boys and girls--and is it different for each? What is the meaning of contemporary research on how girls learn for Jewish girls in our educational settings?

"Dreaming of Zion": Toward a real relationship with Israel: What vision/s do we have of this partnership? How do we teach it? How do we live it?

"Too Jewish": How do our ideas about ourselves and Jewish education ("too parochial, too insular") affect what we demand of our educational institutions? Of our community? What kind of changes would need to take place in order for communal leaders to say with pride: "My child is a Jewish educator."

Evaluating the Impact of the Seminar: Can we tell a good idea from a bad one? When we examine a proposal, do we weigh its merits and flaws differently as a result of the seminar? Have we set up institutional structures in Milwaukee to transmit what we've learned? Are we making a difference in the institutions in which we play a leadership role? And have we drawn in others by our own engagement?

From: Daniel Pekarsky at ☐ 608-233-4044
To: Nessa Rapoport at ☐ 12125322646

9/96
09-19-96 09:34 pm
003 of 005

WHAT THEMES AND ISSUES WOULD EXCITE YOU?
--Participant Responses

Dan's summary of the
planning team's
reactions at the 6/23
meeting.

The questions we formulated looked something like this: a) formulate 1 or 2 dilemmas/issues that you face as a leader that you wish you had a sustained opportunity to think about? b) If you read through a syllabus for a leadership education course, what would excite you? Here's what we got back.

A VERBATIM SUMMARY (except for a few comments I couldn't decipher)

1) "I keep getting pulled back to how you create that vision-driven institution -- how you work to move lots of people to see the need to verbalize and then more to that vision." [How do you get lay people serious about creating a vision and setting goals, both in institutions and in the community at large.]

How build consensus around an institutional vision?

"Ideas about the meaning of Jewish pluralism."

"The role of lay people and professional.."

"Models of excellence..."

The possibility of a meaningful Jewish existence in North America.

2. "almost any kind of Jewish learning that will expand my base of knowledge.."

"Great frustration with emerging young leadership who don't even understand why they need to support their Jewish community?"

"What will keep American Jews Jewish? How do we keep our kids Jewish, excited about being Jewish and doing Jewish things?"

"How do we keep Jewish education in the forefront of Jewish funding priorities?"

3. "Burnout as leader."

"Outreach/inreach."

"Ideas what would help in my business or profession."

"Dealing with professional staff; dealing with rabbis."

"Business approach vs. non-profit (Jewish) approach"

"Jewish historical basis"

4. How do people learn?

Education for what?

Meaning of Jewish education

Change as a vehicle for building community

How to move ideas from secular world into Jewish educational settings.

Enriching the lay/professional partnership.

How to establish funding priorities in a pluralistic environment.

5. Issue 1: whether educational goals/funding should be unified among/across all religious sects in the community.

Issue 2: where do you place the baseline: all-inclusiveness or minimum goals, i.e. every meal a Kosher meal.

Exciting themes: "Leading Jewishly" -- what does it mean?

6. How to integrate textual themes into dynamic situations.

How to apply ethical studies and motivate others.

How can traditional texts and commentaries apply to contemporary issues and problem-solving.

7. What is the "community hat in decision making -- not just \$? How do we reach consensus more thoughtfully and quickly - on the same playing field? How can we possibly give all players their due? [How give all the players the ability to take a genuine community-perspectives as opposed to a narrowly institutional hat?]

How do we present, discuss, process ideas and promote suggestions that are less popular. Open-minded considerations/sensitivity involved/required as a member of the community-at-large.

How to instill confidence in all types of participants so they believe others interpret their opinions as valid, creative, and manageable.

Development of framework of Jewish perspective based on enhanced education and participatory discussion/interaction so

that it's natural and requires no real thought or effort -- and how to develop that throughout the community.

ADDITIONAL ISSUES/THEMES ARTICULATED (based on dp's notes)

- a. Shared goals for different groups--is it desirable? is it possible? if so, which ones
- b. What functions belong to lay boards, which to professionals -- what's the optimal division of labor.
- c. How bring people from "the outside" in and make them feel confident?
- d. How apply traditional texts to contemporary issues? How use them to illuminate our deliberations? (e.g. Arna Poupko)
- e. Is it possible to create a meaningful communal vision? Are there successful examples? How would having a communal vision help us? Is it worth struggling to achieve? (community mobilization for what?? community-wide goals for Jewish education)
- f. What does/should the common good over-ride the needs of the individual (at the level of community, at the level of the classroom, in hiring/firing decisions, etc.)



Commission Co-Chairs
Jane Gellman
Louise Stein

Project Director
Dr. Ruth Cohen

MEMORANDUM



DATE: July 17, 1996

TO: Members of the Leadership Development Action Team

FROM: Jeanette Peckerman and Joel Schindler, Co-Chairs

SUBJECT: Next Meeting with CIJE Consultants

Our next work session with Dr. Daniel Pekarsky and Nessa Rapoport, CIJE consultants, will be held on:

Monday, September 9, 1996
5:00 - 9:00 P.M.
JCC, Room 218

We will continue working on the development of an action plan.

Please mark your calendar and return the enclosed card indicating your availability. A Kosher dinner will be served.

Enclosed please find the Summary Notes from the June 23rd work session.

/map

Enclosures

cc: Dr. Daniel Pekarsky
Nessa Rapoport

Chair
Morton Mandel

Vice Chairs
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Bennett Yanowitz

Executive Director
Alan Hoffmann

**Report on Planning Meeting:
Milwaukee Leadership Development Action Team
June 23, 1996**

TO: Leadership Development Action Team
FROM: Nessa Rapoport; Dan Pekarsky
DATE: July 3, 1996

This consultation took place following a series of meetings on leadership development, resulting from the Lead Community Initiatives Project.

Summary of previous decisions: The program under consideration would be a systematic approach to developing leadership for Jewish education in Milwaukee--not a one-shot workshop or retreat. It would have high entry requirements (including a written application) based on ability, access to decision-making, and commitment. Participants' different levels of knowledge and experience with educational issues will need to be taken into account. To build a knowledge base, there will be a work project undertaken in teams of two from a shared setting. To transmit that knowledge, there will be a mentoring component.

Content: The curriculum would incorporate:

1. Powerful Jewish ideas: It would address such questions as: What are different visions of community in Jewish thought? What is a meaningful Jewish existence in North America? What role can education play?
2. Powerful educational ideas: It would address such questions as: What can educational excellence look like? What are models of visionary ideas and their educational settings in Jewish and general education? What is cutting-edge thinking today about teaching and learning?
3. Powerful ideas about leadership: It would address such questions as: How does Judaism, philosophically and historically, illuminate the role and responsibilities of leaders? How have informed leaders transformed Jewish life? Jewish and general education? What skills are necessary to implement vision?

These elements will be presented in an integrated rather than sequential way.

Context: This pilot program would be a pioneering one, providing a model for other communities interested in mobilizing support for Jewish education. In the landscape of North American Jewish education, there are not currently:

1. A serious, well-developed knowledge base and curriculum to address the question: What does a leader need to know to be an informed champion of Jewish educational change?
2. Ongoing local frameworks within which leaders who serve educational roles (school presidents; synagogue education chairs; community leaders; etc.) could meet their counterparts to augment their learning and forge partnerships for improving Jewish education. These ongoing frameworks also do not exist at a national level.
3. Mechanisms for transmitting acquired knowledge to successors.

Outcomes: In order to describe how Jewish education might be different in Milwaukee as a result of this initiative, we discussed personal experiences of outstanding--or poor--teaching, in Jewish and general education. Among the elements common to teachers who were models of excellence:

1. Comprehensive knowledge.
2. Passion for the material; ability to “make it come alive.”
3. Gift for connecting with participants; for stimulating people to think, care, and grow.

What, then, would success look like? We focussed on two questions:

Question 1. What do leaders need to know to make sound, sophisticated decisions about education in institutional or communal settings? What will they be able to do that they cannot do now?

Question 2. If you took a visitor on a tour to Milwaukee to show the successes of Jewish education in the future as a result of this program, what would he/she see?

Among the answers to Question 1.:

A leader who completed this program would:

1. Know how to ask the right questions, and have criteria for good decisions--to judge the merits of a proposed initiative, for example.
2. Have an appreciation for the richness of Jewish learning as a rewarding activity.

3. Have an awareness of the big questions in Jewish life and their relationship to Jewish education: Where are we heading as a Jewish community? Where do we want to be heading? What is our vision of a meaningful Jewish existence?
4. Have the ability to see the relationship between local problems in Milwaukee and larger systemic realities (the severe national shortage of senior personnel in Jewish education; the undertraining of Jewish teachers; etc.)
5. Understand the cost of education and the finances required for excellence.
6. Share a common language about Jewish educational issues with a cadre of peers.
7. Build relationships to encourage cross-setting partnerships to improve Jewish education in Milwaukee.

Among the answers to Question 2.:

A visitor to Milwaukee's Jewish education would see:

1. "A glint in people's eyes!"
2. As few barriers as possible to participation: Everyone should have access to meaningful Jewish education in a range of possibilities. "A friendly, open-door environment."
3. A central address to direct individuals to the experience best suited to their age, interest, need.
4. More dollars available to the enterprise.
5. An environment of institutional cooperation.
6. A clear vision for Milwaukee's Jewish education, being translated into different settings; a system of Jewish education that is part of the real world and not relegated to secondary status; a sense that learning matters.
7. A body of leadership wisdom that is worth passing on.
8. Educational standards in place, both institutionally and communally.
9. A community whose educational needs are met, so that no Jewish person has to leave Milwaukee because of a lack of specific educational opportunities, and, equally, no one feels prevented from coming.

Ultimately, the goal is to create a tradition of leadership in Milwaukee, so that a hallmark of the Milwaukee community will be informed and effective leadership on behalf of always- improving Jewish education.

Criteria for participants:

In a preliminary discussion of criteria for participants, these factors were emphasized in addition to those decisions already taken in previous meetings:

1. A basic knowledge of Judaism, from which to be able to make decisions.
2. The ability to use knowledge in a leadership role; with the goal of "a Jewish approach to solving problems."
3. Good interpersonal skills and a sense of community.
4. Willingness to nurture this process, to "find their own replacements."

Next steps:

Among the issues to be addressed at subsequent meetings are these:

Content:

1. What will be the major themes and questions to be addressed?
2. In light of those choices, on what expertise can we draw?
3. What are the criteria for participants?

Process:

1. Who will be the local coordinator to be proactive in initiating and implementing recommendations?
2. If a partnership between lay people and professional educators is critical for making change, how will that issue be taken into account?
3. What is the application process, with a target of starting the program in the winter of 1977?
4. Funding.
5. Calendar for subsequent meetings.

The next meeting will be organized to take place before the Jewish holidays.

Action Team's Decisions—Summary.

A. target population

- members of educational institutions
- involved in Jewish educational institutions
- teams from these institutions; top leadership

B. Entry Requirements

- be Jewish
- commitment to participate in training
- demonstrates leadership
- commitment to remain engaged as a leader
- shows interest in Jewish education

C. Grads look Like

- desires more Jewish Knowledge
- Aspires to lead (seeks leadership positions)
- aspires to make change
- communicates
- implements vision in Jewish educational settings
- accuser Jewish knowledge.
- integrates Jewish knowledge into leadership decisions
- applies Jewish values into leadership decisions

D. Skills Development –Outcomes

1. Skills Development
 - communication
 - facilitation
 - crisis management
 - volunteer recruitment
 - consensus building
 - group dynamics
 - delegates responsibility
2. mentors Others for Continuity of Process
3. Recognizes/understands the Agenda
4. Advocates for Jews Education

Other Recommendations

- convene focus groups before to discover what it will take for candidates to make such a commitments.
 - discuss up front with each candidate a tentative plan for community involvement
 - establish an expectation for community service upon graduation
- Selection of candidates through institutional nomination and a personal interview.



Lead Community Initiatives
for Jewish Education

Commission Co-Chairs

Jane Gellman

Louise Stein

Project Director

Dr. Ruth Cohen

LEADERSHIP DEVELOPMENT

Project Timeline

January, 1997 - October, 1997

I. Curriculum Development

A. Hire Curriculum Developer/Lead Teacher

- *determine criteria
- *develop inventory of prospective candidates
- *interview candidates
- *select/hire candidate
- *secure needed funds

B. Organize Demonstration Lesson/Focus Group Session

- *determine purpose, content and structure of lesson, questions to be asked and instructor(s)
- *develop program
- *recruit participants
- *offer program

Mid-March

C. Develop Curriculum

- *identify key resource people
- *interview resource people
- *develop an outline of seminar sessions (16 sessions)
- *develop curriculum draft
- *review draft (action team, prospective teachers, resource people)
- *revise, complete curriculum

D. Hire Instructors

- *develop an inventory
- *interview candidates
- *select/hire instructors

A planning process of the Milwaukee Jewish Federation, in partnership with the Council for Initiatives in Jewish Education, leading to systemic change in Jewish education.

II. Secure Funds

- | | |
|---------------------------|---|
| February 10 th | A. Submit a proposal to the Jewish Community Foundation |
| April 7 th | B. Submit a proposal to the Bader Foundation |
| | C. Explore other funding opportunities |

III. Promote Program

- A. Develop promotion/PR approach
- B. Develop promotion materials
- C. Implement promotion plan

IV. Recruit Participants

- A. Determine criteria for selection
- B. Determine recruitment approach/plan
 - *interview each candidate?
 - *present a demonstration lesson?
- C. Recruit participants

V. Implement Program

- | | |
|-----------------|-----------------------------|
| September, 1997 | *organize program logistics |
| October, 1997 | *offer program |

Foundation Deadlines:

Jewish Community Foundation – February 10th - Mid-March, 1997

Bader Foundation – April 7th (May 7th) - August, 1997

The questions I found interesting.

**Leadership Development Action Team
Milwaukee: 6/20/96**

1. Can teaching change lives? Personal reflections on why education matters. History of Jewish commitment to literacy and learning. Theory of transformative education. Where do ideas in general education intersect with Jewish ideals? [Character/value education]
2. "There's nothing as practical as a great idea," Part I: Using tradition to make change [Sarna reading]. How have Jews revitalized themselves through history? What kind of leaders have we had--and what do we believe about the individual's power to make a difference, theologically and historically?
3. Why be Jewish? How do we think of ourselves in North America now? Ideals of Jewishness through education. Ideals of American life through education. Are those visions reflected in the educational settings we've experienced?
4. "There's nothing as practical as a great idea," Part II: In Jewish education: What can Jewish educational excellence look like? What does it take to get there? Models of visionary ideas and their settings from Jewish and general education. Best Practices examples, Jewish and general.
5. Inside great teaching and learning: What is the cutting-edge thinking about teaching and learning? What do we know about Jewish teachers in how they are trained and how they grow professionally? What would it take to change Jewish teaching? What are the missing pieces on the American-Jewish landscape? In Milwaukee?
6. Culture and education: What can we learn from the imaginative arts that is essential in the way we think about education? The arts as problem-solving. Why are Jews so deeply engaged in the American arts as artists, patrons, and participants, and yet Jewish institutions do not reflect the best capacities of the arts?
7. Gender and education: What kind of men and women do we want our children to become? How do our educational settings prepare children, as well as young men and women, to love, work, and create community? Are the models they transmit authentic and resourceful? Do they merely imitate American culture at its worst or do they present a real alternative? What is the message of Jewish intellectual culture for boys? For girls? What is the face of the Jewish community for boys? For girls? What is the meaning of the research on how girls learn for Jewish girls?

If we know that Jewish women will be the best educated of American women and that Jewish men will be among the best educated American men; if we know that both are likely to work in demanding jobs; if we know that Jewish commitments to school, camp, synagogue, JCC and Israel require a high income, how are we preparing the next generation to revitalize Jewish life while contributing to American life? What can we learn about how families transmit culture?

8. Spiritual strength, goodness and healing: Besides the ability to get into Harvard and make it in the global marketplace; besides literacy and competence; what other qualities do we value that education might foster? What other qualities might be considered that are underestimated as goals?
9. "Dreaming of Zion": Toward a real relationship with Israel. What vision/s do we have of this partnership? How do we teach it? How do we live it?
10. Great failures in American and American-Jewish education: What can we learn?
11. "Too parochial; too insular; too Jewish": How do our ideas about ourselves affect what we demand of our educational institutions? Of our community? What would it take for us to say, with pride: "My child is a Jewish educator"?
12. Making a difference: Models for the role of lay people/community in education, in partnership with educators, both in general and Jewish education. How do we keep learning and growing? What frameworks exist or need to be created for continual learning about educational leadership within Milwaukee? Nationally? How do we transmit a knowledge base to our institutional successors? [Mentor program?] How can we imagine Milwaukee as a place whose hallmark is active, sophisticated educational leadership in partnership with sophisticated educators? What have we learned that can be useful to other communities?
13. Evaluating the impact: Can we tell the good from the bad? Have we set up structures to transmit what we've learned? Are we making a difference in the institutions in which we play a role? Have we drawn others in by our engagement?

FAX TRANSMISSION

CJE
15 E. 26 St.
NEW YORK, NY 10010-1579
(212) 532-2380, ext. 408
FAX: (212) 532-2646

To: Dan Pekarsky

Date: May 28, 1997

Fax #:

Pages: 3, including this cover sheet.

From: Nessa Rapoport

Subject:

COMMENTS:

Dan: This interview for the strategic planning process was very influential in Barry's thinking. It has implications for our "lay" work and so I wanted you to see a copy.

Nessa

CIJE Strategic Planning Process
Interview with Reynold Levy
February 25, 1997
Karen Barth and Barry Holtz

Reynold Levy has worked both within and outside the Jewish community. Currently he is very involved with the Nathan Cummings Foundation, chairing their Jewish life committee of the board. From our interview one gets the sense that Reynold sees himself as a kind of outsider to the mainstream power structure of the Jewish community, who views that structure as highly problematic and in need of significant change.

Reynold sees the Jewish world as being "stuck in a place where the sun doesn't shine." It hasn't changed and it operates with (and is satisfied with) second-rate leadership, both lay and professional. There are some exceptions of talented people in that mainstream world-- but even those exceptions (he mentioned specific people) once they get themselves involved in the power structure get pulled down into mediocrity, unimaginative thinking and wasting their time on those things that really are secondary while ignoring the kinds of changes that need to be made. His greatest criticism was aimed at federations in general and the CJF in particular. He thinks that the GA is an enormous waste of time, indeed worse than that.

In general those who are attracted to these mainstream arenas of Jewish life represent entropy. Wherever there are exceptional people or institutions, there you see life. Examples of the latter are: the Jewish museum, Brandeis University (in recent times), Bnai Beshurun in NY.

The most interesting and talented people he knows wouldn't get themselves involved in these institutions and therefore we are losing a great deal of potential leadership. In his view the Federation world, both lay and professional, is run like a closed guild. Barriers to entry are set very high as a way of keeping new blood out. *What kinds of people haven't been tapped?* People in political campaigns, advertising people, arts, etc.

Another problem in the Jewish institutional world is that professionals are not held accountable. Boards do not exercise the kind of supervisory role over professionals that would demand accountability. Need to broaden boards to bring in new energy sources. He feels this has happened at the Jewish museum. A very good model is the Am. Museum of Natural History. *(The name Francine Ostrower came up here, but I'm not sure who she is--BWH)*

To change the current situation we would need a different brand of leadership. Outsiders to the Jewish community seem to be the best for effecting such changes. He believes that the smaller we are the better off we are.

To change the current situation we would need institutions that don't take their lay leadership for granted (as is currently the case). Often people are simply not asked to become leaders in this world. He mentioned someone who was a very well known business leader, obviously Jewish, who had never even been asked to be part of J. Communal life because he didn't come in through the usual federation/institutional route.

When asked about the effectiveness of developing models to stimulate change, he said that some institutions *might* change via models, but this needs to be highly decentralized to be effective. He thought that it would be possible to create "beacons of Jewish education" but his main caution was that these models need to be structured in ways to invite replication; efforts to learn about them should be built into the project itself. This is almost never done, he said, and therefore replication becomes almost impossible and we learn very little from these models. He thought the Jewish healing centers were a good example of replicated models.

He was very impressed by Clinton's State of the Union address and felt, in that spirit, that CIJE could do good work by setting national standards, mobilizing volunteers (like Hillel students), and creating some Jewish equivalent of an "education summit."

In his view Jewish money since the second World War-- as opposed to earlier in American Jewish history-- had created very few enduring Jewish *institutions*. Most of the institutions that we have today were created quite a long time ago. Thus he feels that there needs to be a commitment to institution-building. For example, there are virtually no Jewish hospices or day care.

The Jewish community doesn't relate to people "epiphany moments". (He mentioned Bob and Judy Rubin as an example of this missed opportunity. The specifics are not in our notes-- BWH.) We ask people to "give back" to the J. Community. But to give back you have to have received in the first place!

We have an infinitesimal market share of Jewish money right now in the community and we need to find ways of bringing in those "outsiders." He believes that there is really an endless supply of philanthropic money for institutions, but we haven't figured out how to tap that yet.

In his view working with federations should only be "an extra-curricular activity for CIJE." Federations do some things well-- distributing money equitably, rescue efforts-- but we need to keep in perspective what federations can and *can't* do.

Advice: CIJE needs to build into our planning process our own accountability. CIJE should be paid a fee for what it does. We need to ask who is our market, who is our audience. He recommends "narrowcasting" not broadcasting.

He thinks CIJE should create a think tank about change. CIJE could become an honor for people-- by becoming named senior fellows for a time or interns at CIJE.

Wonderful Idea!! - Very Exciting - New

Like idea of serious study, but

urge an integrated approach

that includes: Big Jewish ideas

Big. Ed. Ed Ideas

Ideas re: leadership

Don't delay
making the connections!
make the Ed. piece
shines, re-int

Big Ideas about Judaism

1) Conceptions of a meaningful Jewish Exist.

2) What does it mean to be a
Command?

3) Nature/place of Study/Learning/teaching

4) Leadership

Via Serious text study
Big thinkers

2) Education

a) Implications of #1 for Education

b) Challenge of encouraging serious study

c) Big ideas — Education

Lee Shulman

Deborah Bull

3) Leadership → Org Development
• Jewish

Ultimately: 1) A core of energetic people, w/ a vision
↳ 2) A plan

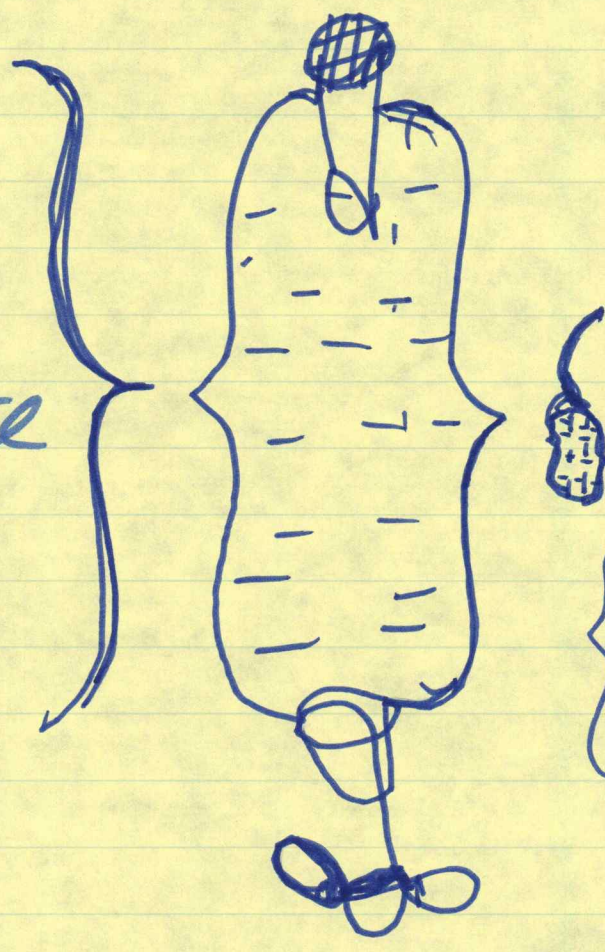
*Joel -

5 P -
2265

Jim
Chip

Jeanette

Ruth



{ creating
Evidence
to argue }

① Knowledge not Community

②

Andrea - Tuesday

Lead Community Initiatives
Lay Leadership Development Action Team
May 20, 1996

Notes on the plan before
Don and I met with
the planning team.

SUMMARY NOTES

Attendance: Jeanette Peckerman and Joel Schindler, Co-Chairs; Jody Kaufman Loewenstein, Chip Mann, Jim Zucker. Staff: Ruth Cohen.

I. Program Development Plans.

A telephone conference call with Dr. Danny Pekarsky and Nessa Rapoport from CIJE was held. The purpose of the call was to outline the plan for the creation of the lay leadership development curriculum.

Dr. Pekarsky suggested that the curriculum will be comprised of three integrated themes:

- powerful Jewish ideas
- powerful educational ideas
- ideas about leadership

Theme 1 – Powerful Jewish Ideas

It should focus on "Torah Lishmah" – study of Jewish text, and should be taught by the "best available teachers". The ideas selected will provide a platform for reflection on important issues such as: what does it mean to live a meaningful Jewish life, and what does it mean to be a Jewish community.

Jewish text can also be used to illuminate important issues in Jewish education.

Theme 2 – Powerful Ideas in Jewish Education

This theme will include the following:

- a. What are the implications of all of the above to Jewish education in our community; building bridges from big ideas to the educational challenges that Milwaukee faces.
- b. For some participants, this seminar may be their first opportunity to engage in serious Jewish study. How can we make quality Jewish education accessible to a larger audience in our community?
- c. Exploring powerful ideas in the world of secular education – cutting-edge thought about learning and teaching – and its implication to Jewish education in our community.

Theme 3 – Leadership

Our program should bring in people who can help us clarify ideas about what it means to be a lay or professional leader using information from the field of organizational behavior.

Dr. Pekarsky thought that the three themes need to be integrated. Moreover, the seminar needs to include a personal dimension – asking how these ideas resonant with what we think it means to be Jewish; the seminar program needs to connect with the life of the people who participate in it.

- Joel Schindler: Most participants have had a negative Jewish education experience. We need to teach them the joy of Jewish education; later, they will be able to carry the banner.
- Danny Pekarsky: You can create excitement around discussion of big ideas integrated with "Torah Lishmah". We should encourage integrated approach rather than a serial approach.
- Chip Mann: Most people are already in Step 2 – they have an interest in Jewish education and a love for Jewish study, which brought them to table.
- Nessa Rapoport: You can be a well-educated Jew without having an understanding of Jewish education issues. Jewish study may lead to Jewish education issues.
- Joel Schindler: Who will develop the curriculum?
- Danny Pekarsky: This is a lay-driven process; members of the Committee will work with CIJE, LCI and other professionals to develop the plan.
- Joel Schindler: I don't know enough to design a curriculum, or what questions to ask.
- Jim Zucker: We can do it in concert with others; we know what will interest other lay leaders.
- Chip Mann: We can specify outcomes.
- Danny Pekarsky: We need to decide together who will sit at the table.

Lay Leadership Development Action Team
Summary Notes
May 20, 1996
Page 3

Nessa Rapoport: Prime question is how to translate Leadership Development Program into action. We may need to combine a variety of experiences – formal study, examining Jewish education experiments, retreat, etc.

Jim Zucker: Integration is a key concept. We need to outline the plan and decide who should sit at the table.

The group decided to convene a planning session with CIJE consultants during June, 1996.

/map

Lead Community Initiatives
Leadership Development Action Team
April 30, 1996

SUMMARY NOTES

Attendance: Jeanette Peckerman and Joel Schindler, Co-Chairs; Jody Kaufman Loewenstein, Chip Mann, Mitch Moser, Louise Stein, Marci Taxman, Jim Zucker. Staff: Ruth Cohen.

I. Welcome.

Louise Stein introduced Dr. Paul Flexner, Director of Human Resources Development at JESNA. Paul gave a short presentation about the function of JESNA.

JESNA has recently surveyed lay and professional leaders in 11 communities to identify the major focus for JESNA in the next five years. The recommendation of the individuals surveyed was that JESNA should increase its involvement in lay leadership development. JESNA is interested in launching a number of pilot projects to develop new models of leadership development.

Dr. Flexner outlined the major questions that a leadership development program should address:

- What do we mean by Jewish education?
 - How does Jewish education differ from secular education? What are expected outcomes?
- Jewish education for whom?
 - Jewish education includes informal, formal and experiential education for all ages.
- Who are the professionals in Jewish education?
 - What are their work conditions?
 - How can we help them grow professionally?
- What are the major issues related to financing Jewish education?
 - How is funding achieved?
 - How is it allocated?
 - How can we secure funds for the future?

Addressing the above questions will help lay leaders better understand the culture of Jewish education and, thus, deal with it more effectively.

JESNA will help set up a structured program that is tailored to meet the needs of the community, follows the current knowledge of how adults learn, and utilizes the best techniques for leadership development.

JESNA may be involved in both the development of the program and the facilitation of the modules. Dr. Flexner suggested that we identify local experts to help us with the development of the learning modules and the facilitation of the sessions.

In addition to the program development team (e.g. Dr. Paul Flexner, Dr. Ruth Cohen and 2-3 other local experts), we can bring in other experts to facilitate specific sessions.

Another suggestion made by Dr. Flexner was to work with Rabbis and other individuals engaged in adult education on how to teach adults. It is also important to create a parallel training track for professional leadership – school directors and Rabbis in order to create better understanding of how to join forces with the lay leadership and work together towards the improvement of Jewish education.

One of the questions raised in the meeting was how to best integrate the three components – Judaic knowledge, skills, educational issues.

It was suggested that team teaching may be a useful approach. Also, individual projects can help participants integrate the three components in a meaningful way.

Chip Mann noted that in some local synagogues, Jewish education receives high priority. Dr. Flexner said that some institutions nurture their educational system; however, often there is a gap between rhetoric and formal allocation. In many institutions, the professional educators' salaries are low and teachers receive no benefits.

Jim Zucker emphasized that it is important to include young, emerging leaders in our effort.

Lead Community Initiatives
Leadership Development Action Team
April 15, 1996

SUMMARY NOTES

Attendance: Jeanette Peckerman and Joel Schindler, Co-Chairs; Chip Mann, Mitch Moser, Louise Stein, Jim Zucker. Staff: Ruth Cohen.

I. Welcome.

II. Admission Process.

Joel Schindler presented the following three questions:

- Should there be an institutional nomination?
- Should there be an application procedure? What kind?
- Who should decide? If a lay committee will select applicants, who should serve on it?

Joel reviewed the admission process for the Wexner Program. The process included the following phases:

1. Nomination from institutions.
2. Application form.
3. Interview with the national president of Wexner.

Jeanette Peckerman said that since the criteria for success of the program is not well defined, it is difficult to assess the effectiveness of the admission process.

Joel – We need to discuss up front, with each candidate, a plan for community involvement after graduation.

Louise Stein – Establish an expectation that people commit themselves for several years for work in a communal setting.

It was agreed that the admission process will include the following:

- Nominations by organization (including a nomination letter from the organization specifying expected outcomes).

- A pre-specified criteria established by the Action Team.
- Candidates will demonstrate potential for leadership.
- Institutional value (how would the organization utilize the skills of graduates?)
- Individual application.
- Interview for selected applicants.
- Review committee? composition?
 1. Some Action Team members.
 2. LCI input.
 3. Instructor's input.
 4. Miscellaneous others.
- Cost?

It was anticipated that the group of program participants will be heterogenous; some participants may be more experienced than others. However, all of the participants will have to demonstrate some level of community involvement and leadership potential.

Joel asked what should the content of the program include? The group decided that the program would have the following characteristics:

Content

- Cohesive focus.
- Integration.
- Modules that include:
 1. Knowledge.
 2. Skills.
 3. Implementation.

Lead Community Initiatives
Leadership Development Action Team
February 21, 1996

SUMMARY NOTES

Attendance: Jeanette Peckerman and Joel Schindler, Co-Chairs; Jody Kaufman Loewenstein, Chip Mann, Mitch Moser, Jim Zucker. Staff: Ruth Cohen.

I. Defining Goals, Outcome and Input Standards.

A. Expanding the Strategy.

1. Should we adopt the Wexner model of leadership development?

Strengths of the model:

- It is proactive, intense and interactive.

Weaknesses of the model:

- It lacks a skills development component – how do we perform as leaders?
- It lacks a component about the application of knowledge to the Jewish education endeavor.

2. Should we offer a single track or multiple tracks?

The group recommended that we start initially with a single track and examine the possibility of adding other tracks in the future.

3. What is the meaning of "Jewish Education Endeavor"?

We will focus on issues pertaining to Jewish education in a broad sense. We will develop a model that may later be adapted to other Leadership Development programs.

4. What would the graduates of the program look like?

a. Track 1 – Grad Looks Like . . .

- Desires more Jewish knowledge.
- Aspires to lead (seeks leadership positions).

- Aspires to make change.
- Communicates.
- Implements vision in Jewish educational settings.
- Acquires Jewish knowledge.
 1. Integrates Jewish knowledge into leadership decisions.
 2. Applies Jewish values into leadership decisions.

b. Track 1 – Skills Development . . .

1. Skills.
 - Communication.
 - Facilitation.
 - Crisis Management.
 - Volunteer Recruitment.
 - Consensus Building.
 - Group Dynamics.
 - Delegate Responsibilities.
2. Mentor others for continuity of process.
3. Recognizes/understands the agenda.
4. Advocates for Jewish Education.

c. Track 1 – Target Population . . .

- Member of Educational Institution.
- Involved with educational agenda.

d. Track 1 – Entry Requirements . . .

- Be Jewish.
- Desires/able to participate (commitment).
- Demonstrated leadership.
- Commitment to remain engaged as a leader.
- Shows interest in Jewish Education.

Lead Community Initiatives
Leadership Development Action Team
February 5, 1996

SUMMARY NOTES

Attendance: Jeanette Peckerman and Joel Schindler, Co-Chairs; Jody Kaufman Loewenstein, Chip Mann, Louise Stein, Marci Taxman, Jim Zucker. Staff: Ruth Cohen.

- I. Dvar Torah - Barbara Grande.
- II. Introductions - Jerry Benjamin.
- III. Background Information - Louise Stein gave an overview of the history and work of the Lead Community Initiatives Project (see enclosed handout).
- IV. The work of the Action Teams.
 - A. Ruth Cohen explained the action plan development:
 1. Understanding the Strategy.
 2. Information Gathering—Local.
 - Mapping Existing Community Opportunities
 3. Brainstorming for Action Team Ideas.
 4. Information Gathering—National.
 - Identifying National Resources
 5. Agreeing on Recommendations.
 6. Action Plan Writing.
 7. Cost Benefit Analysis.
 8. Approving the Action Plans.
 - Action Team
 - Steering Committee
 9. Securing Funding.
- V. The Charge of the Team.
 - A. Understanding the Strategy.

Joel Schindler presented the Leadership Development strategy developed by LCI's Planning Team two years ago:

We will raise the level of Jewish knowledge of lay leaders through their ongoing participation in Jewish study (including the ability to transfer this knowledge to the Jewish education endeavor).

1. The group identified the following key words:

Jewish knowledge

Lay leaders

Jewish education endeavors

2. Explanation of key terms:

- Jewish knowledge – Jewish text, either values and history related to leadership and decision-making.
- Lay leaders – what is a lay leader?
 1. Volunteer time.
 2. People in charge who have responsibility.
 3. Proactive participation.
 4. Decision maker.
- Jewish Education Endeavor.

The focus of the strategy is on leadership within Jewish education context. Need to define what are the endeavors.

3. Other Comments/Issues.

- Need to identify measurable goals. What will leaders look like after completion of program?
- Often people are promoted to positions of leadership without proper background.
- Emphasis on individuals or institutions? Without institutional buy-in, we will not be able to succeed.
- Who is our target population? – potential leaders, people who have demonstrated leadership skills or existing leaders! Should we include professionals?

- Individuals need to demonstrate interest and leadership skills.
- Train a core of people in different settings who will later train others.
- What is the ideal leader? – leadership is a continuum.
- How do we evaluate outcomes? – how does the Wexner program evaluate outcomes?
- Jewish education should be defined broadly and include synagogues and agencies.