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Prepare Jewish educators for leadership positions. Principals initiative,
2000.

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Minutes:	Mandel Foundation Steering Committee <u>Leadership Initiative North America</u>
Date of Meeting:	December 5, 2000
Minutes Issued:	December 20, 2000
Present:	Morton L. Mandel (Chair), Howard Charish, Ben Dansker, Seymour Fox, Daniel Gordis, Annette Hochstein, Steve Hoffman, Stanley Horowitz

Program for Day School Principals

The main conclusions of B Holtz's paper on principals were:

There is an acute shortage of Day School principals, particularly those trained as educators or with a strong background in Jewish Education. There have been some cases of moving from general education to Jewish education. This may be due to factors which include: frustration, concern with personal security, proximity of Day School to the neighborhoods in which they live, etc. The belief among this target group had been that salaries would be more or less equivalent to those paid in private schools. They are finding instead a significant disparity in favor of Day Schools which is largely a reflection of supply and demand. The study determined that very few have a real background in Judaica or an understanding of the Jewish community. These gaps could be filled by a training program.

The study found that recruitment would not be an easy challenge. While many of those interviewed found the idea appealing it was not something that they would necessarily consider for themselves. Lay Leaders who were interviewed expressed similar feelings, that the idea was sound, but not something for their school.

A number of points were raised regarding the findings of the report. It is felt that were the facts (salary, opportunity, etc.) to be known by the target population that there may be more latent demand than we realize. We agreed that it would be worthwhile moving ahead with this program on the basis of two necessary conditions:

1. That we can recruit qualified individuals
2. That the financial requirements (partner) are in place

This would be a form of market testing and could be a model for other programs (e.g. Federation Executives) which we are considering. For any program which we are considering, we would define the necessary conditions and judge the likelihood that we can fulfill those conditions.

Necessary conditions might include community size and other characteristics including characteristics of the community leadership.

It was suggested that the approach to our work in North America be on individual communities. In each community that we would work we would undertake a diagnostic in cooperation with the community. The diagnostic would identify the positions that need to be filled and the individuals who require up-training. The community would help us to market and recruit. Working with a community in this way would fulfill another necessary condition, namely that the community wants us to be involved with them in this area.

Another approach would be national rather than local, in which one way of creating a partnership that would include financing might be via a coalition of Federation Executives from the top communities in North America. In such an approach, candidates would be attracted from throughout North America for positions which would not necessarily be in their current communities.

An approach which combines elements of both the national and local is to target a number of communities in North America which are experiencing a crisis. Similarly, it might be possible to build a coalition of schools that want to improve Day School education. This might result in both improving the quality of incumbent principals and bringing in new principals.

We acknowledged that there is a perception problem which may limit the seriousness with which some community leaders take the problem. While many acknowledge specific human resource shortages in their communities, they seem unwilling to take a long range strategic approach. The tendency is to solve immediate problems through patch work solutions. If they find a principal who is otherwise qualified, but weak in Jewish studies, their answer is to hire a Rabbi to boost the particular school's strength in Jewish studies, rather than to train the principal. There seems to continue to be reluctance to invest for the long-term (e.g. to pay for training programs), although it is possible that we have not sufficiently tested willingness to pay. We may have to accept that the Jewish community is at this point unwilling to deal with the long term and then figure how to use our resources in such a way as to both address the immediate needs of communities and encourage them to take a more long term view. Possibly successful demonstrations (e.g. in Cleveland) will convince other communities that our approach is right for them as well.

The conclusion of our discussion regarding Day School principals is that we still have not found the best way of dealing with the problem of leadership for Day Schools. We may not be able to find serious partners to work with initially and therefore to the extent that we still believe that this is of significant importance to our work in North America, we may have to make the initial financial investments with the objective that ultimately, others will pay the costs. One other possibility suggested is that we take the position that we are building a block program that will train people with the potential to become leaders in Jewish education. We would have to determine the necessary conditions that would allow the Foundation to take the decision to go in this direction (**assignment**).

MANDEL FOUNDATION

TO: Seymour Fox
Cc: Howard Charish
FROM: Barry Holtz
RE: The Principals Program
DATE: November 26, 2000

I'm writing to update you on our current thinking about the Principals Program and to get your advice and counsel. FYI: I've also included an Appendix that updates our "chart of contacts."

We have been spending a good deal of time lately discussing what is the appropriate direction to head in with this initiative. Howard, Joy, Danny Pekarsky, Danny Gordis and I have all been involved in these discussions. At this point we feel that we could use your input in advance of the upcoming meetings of the Mandel Foundation. Here is the situation:

Our Assumptions

From the beginning we have been working with the following assumptions: 1) That there is an acute shortage of day school principals in North America, particularly those trained as Jewish educators; 2) That a number of day schools have been turning to experienced educators from general education to fill these jobs; 3) That, although many of these principals are highly skilled, few either have preparation in Judaica or a deep understanding of the Jewish community and the unique qualities of Jewish day schools; 4) That the Mandel Foundation is uniquely positioned to offer a program that would address the above issues; 5) That this program represents "low hanging fruit" for the Mandel Foundation—that is, it would be easy to locate and recruit excellent candidates and thereby attain a "win-win" for the dayschool movement and the Foundation. We could both address a serious problem and launch a new initiative in a relatively short amount of time.

In our view all of the assumptions above are correct, **except for #5**. Unfortunately #5 is a crucial item in terms of a decision (at least in the short run) for the Foundation.

What We Have Learned

Over the past few months members of the Mandel Foundation staff made numerous phone calls that resulted in 50 interviews. We found these names via personal contacts, word of mouth, advice from Josh Elkin, etc. I would sum up our most important finding as: "everyone agrees that this program is a very good idea; very few people want to sign up." The reason that everyone thinks it's a good idea is pretty obvious—the first four of our assumptions above are widely

shared. *Why* they don't sign up requires serious consideration. Some possible explanations:

1. *Recruiting for a field:* as I wrote in an earlier Mandel Foundation memo, we found that when we proceeded to garner prospective students we were doing more than recruiting for a Mandel Foundation program; we were recruiting for the field itself. Many folks who might have been potential candidates had never thought about turning to Jewish education. Because of that we were in the role of trying to sell that idea to begin with. More importantly, I think it means that there were many people we never located because we just didn't have them in our radar screen. When we recruited for TEI (originally), we had the job of selling a whole new idea in Jewish education. BUT the people we went out to find were well known to us. The "gatekeepers" were well known to us. "Cold calling" customers, as the stockbrokers and real estate agents like to call it, is not an easy way to sign up people for one's educational program! Especially when they had never thought of changing careers.
2. *Smaller Pool than we Thought:* We may have underestimated the size of the potential pool of applicants, at least for our main target group of sitting general education principals by not understanding the pension problem. Many school principals are in traditional pension plans that are not sufficiently "vested" until they reach the age of 55-60, depending on when they started their careers. They are certainly not willing to give up their accrued pensions for this career change. Furthermore, incumbent principals expressed concern about doing any in-service training while in their current position. They were uncomfortable about being away from school any length of time for training that would ultimately result in their leaving their positions. This predicament is compounded by the fact that they therefore would not come with financial sponsorship. In addition, several said that they would only consider entering such a program if there were a "job in hand" in a location preferable to them and with a provision for job security.
3. *Nice, but not for me:* Another issue was that given the supply and demand issues in the marketplace, a person who has achieved a senior level in his/her profession and nevertheless has reconciled the above hurdles can most probably secure a day school principalship without additional training. Consequently, there exists today little incentive to pursue this rigorous course especially when day schools are frantic about filling these top posts. Indeed, we actually located some names of sitting general education principals who have now applied for Jewish education jobs, but who felt that they knew a lot about running schools and didn't see any great gain in taking our seminars. Of course a lot of that has to do with the very reasons we were creating the program—we believe that they need to learn more, but until they take the course, *they* won't see it! Current day school principals who had recently made the move from general education by and large had the same view, with a few exceptions.
4. *Nice, but not for our school:* The same reasoning holds when talking to lay leaders who, we hoped, might help us launch the program by making it a condition of employment for their (new) principals. We didn't speak to vast number of lay leaders (7) but we did generally get a sense that they had enough on their minds finding a principal without our getting involved at this point.

5. *Good, but too much:* It's possible that we scared off some people by our description of the intensity of the program—a month at Harvard, seminars during the year, time in Israel, etc. Those people who were unclear that they needed this anyway may have been pushed over the edge (away from signing up) because of the demands of time, the loss of vacation, the lack of guarantee about a job, the potential expense, etc.
6. *Maybe we missed them:* We did a huge amount of work on this and yet we are still haunted by the idea that somehow the great pool of talent we hoped to tap eluded us. Did we miss it? It's quite possible that what this program needed was a full-time, dogged, traveling around, going to conferences, all day on the phone, kind of professional recruiter. Someone who *only* worked on this program for 5 months. A person Danny Gordis described as a 'recruitment animal.' This job would include organizing parlor meetings and focus groups in communities, going to sit with BJE directors and rabbis and sitting principals, etc. We didn't have that as an option. We also didn't advertise. Of course this was because the Mandel Foundation didn't want to publicly announce a program it wasn't sure it would or could launch. But serious ads in *Education Week*, etc. might have brought in more names.
7. *Competition:* I don't think that the Principals program at JTS and other new initiatives have directly hurt us at this point, but we should keep in mind that there are other things going on that may end up working against us. The JTS program does not—at this time at any rate—aim for our clientele of experienced principals from general education. But it's quite possible that HUC/Los Angeles *will* go in that direction when they start up. Avi Chai also funds a program at the Harvard Principals Center that could end up causing some confusion for us.

Could We Run a Program?

Now, it should also be stated: we *do* have some potential candidates from what we've done so far. (See attached Appendix). Some of these may be quite strong; some may not pan out at all. At this point it's hard to tell. We have tried to imagine different ways that a program could be launched. They break down to something like this:

1. *Go with what we've got:* This idea would say that we have enough to launch, that we will certainly gather up some more with more calls or with an advertising campaign. We should aim to start in the fall with whomever we can gather together by then.
 - a. Advantages: It's a launch. We get off the ground and start to build a reputation for the program and for the Mandel Foundation. Down the road recruitment will therefore become easier.
 - b. Disadvantages: We're really not sure about the quality of the people who are on our tentative "yes" list, how available they would be once we actually set up dates and schedule, and we don't know at all *how much* they would be prepared to invest in the program in terms of time and days away from job and family. Launching with

this group in other words is questionable. And that raises questions about the potential for success.

2. *Danny Gordis: "The Alpha Idea"*: In the world of computers, people use the term "alpha" to refer to the earliest versions of programs, far before they are launched or even tried out on the general public. The concept here would be to recruit a group of people who would serve as our "Alpha," try-out group. We would select a good potential group, and we would NOT say that this is a training program but rather a chance to talk about what would be involved in creating a training program. They would help us actually plan the future program. We might even pay them a small "honorarium" to help encourage their participation. They would give input and serve as guinea pigs for our ideas.
 - a. Advantages: One advantage here is that we could use this as an implementation strategy. People who have up to now said that the program "wasn't for them" (because they viewed themselves as too advanced, etc.) might agree to attend such a planning group. By doing so we would have launched something that later would serve as word of mouth for recruiting a "real" group. And the input of the participants would teach us something about what the program should eventually become.
 - b. Disadvantages: In a way this is a kind of "stealth" launch of a stealth program! Would we *really* view it as a planning group? (Are we being honest with them?) Or is our real goal to have a program and call it by another name? Is it worth it to the Mandel Foundation to go via this circuitous route? Another set of questions involves how much time we could really get from these folks, given the terms of their involvement—in a sense they are helping us out (despite the honorarium which would certainly be small) and they may not be willing to give us an intensive involvement.

3. *Danny Pekarsky : "Ray Levi Redux"*: Ray Levi was the principal of the Agnon school in Cleveland who came to the job from general education. Because of Ray's location in Cleveland and the desire of the Foundation and Mort that Cleveland succeed, the Mandel Foundation in Israel, along with the help of the Melton Centre at the Hebrew University, created an individualized training program to help Ray transition into the Agnon job. Danny Marom became Ray's tutor; Ray studied every summer for 2-3 years at Melton; etc. According to the "Ray Levi Redux" approach, the Mandel Foundation would develop a list of tutors who would be paired with a small (5-8) group both of day school principals who have recently made the transition from general education and general education principals currently sitting in their general education jobs. The tutors would study with the participants and create an individualized training program for each, although the main directions of the program would be similar for each participant.
 - a. Advantages: Like the Alpha plan, this is an implementation strategy. It allows us to launch something and also would serve to help the field of Jewish education in rather direct ways. These sitting day school principals *would* learn a lot and improve in their work; the general education principals might end up choosing to go into Jewish education after such a program (and maybe we could help place

them in jobs.) This group could then help us recruit and advocate for the “real” program that would develop down the road.

- c. Disadvantages: Here there are two types of disadvantages that I see. A) This tutorial plan is very different from what we originally envisioned and I’m afraid that it doesn’t actually push forward our larger agenda of creating the Mandel School in North America. 5-7 tutorials will not naturally lead to a Mandel School type of program even though it may help Jewish education in North America. I’m not sure that it would even lead us to a Principals Program down the road, never mind a Mandel School. B) I’m afraid that such a program would get us into being something more than tutors for individuals; we might easily be used as “consultants” or “coaches” for the principals in their jobs. The focus would naturally get oriented toward practical matters and I don’t think that this is either what we want to do or what we do best.

What’s Good for the Mandel Foundation?

I believe that the Mandel staff still thinks that our first four assumptions about the Principals Program were accurate and legitimate. We honestly think that a successful “transition” program from general to Jewish education *would* make a big contribution to the field. We also think that it would redound well to the Foundation. It’s consistently been Nessa’s view, for example, that such a program would be a great story to tell: the Mandel Foundation is addressing one of North America’s serious concerns—the shortage of day school principals.

Nonetheless we now have the three main options detailed above, if we want to launch something in the near future. Another possibility is to basically say at this point: “This was a good idea. We’ve done the research we said we would do and it looks like right now—without a recruiter, without a Mandel School up and running and in place, and *with* a need to have a good clear success—this is not the right time to launch the Principals Program. We should not reject it—we should put it on the back burner and perhaps continue to see if we could recruit for a launch 18-24 months from now. (Barry’s personal option, for what it’s worth: I think that we would have an easier time launching such a program from an existing Mandel School than using the program as a way of creating the School.)

Moreover, it may be better to ask a different question: Not “how do we launch the Principals Program for General Education Principals, as originally formulated” but “*Given the fact that day schools are an important fact of life in North American Jewish life, what should the Mandel Foundation do for day school principals?*”

I would like to see us do something for principals. One possibility would be for us to revisit the successful CIJE Principals programs that we ran at Harvard some years back and ask if we could launch a new, more intensive and more focused version of those programs. How could we take the Mandel Foundation orientation toward philosophy, goals and vision, as it has been realized in the Israel programs, and translate that for a curriculum here? How could we make an intensive program for sitting principals and not just an annual one-shot affair as we did back then? This

would require a good deal of thought and planning, but I suspect that recruitment would be a good deal easier. We could also focus on communities in which TEI graduates and participants are currently residing, allowing us to “deepen” our work, as Mort has been saying recently. Of course this would *not* address the day school principal *shortage*. And it would be a less dramatic story to tell. At any rate, Seymour, I think we could use your input right now as far as your sense of the direction the Foundation is moving in and how the Principals initiative might best be conceptualized at this time.

Thanks.

Contacts so far:

1. Bob Abramson
2. David Ackerman
3. Dovid Bernstein
4. Stanley Bloomenstein
5. Cincy Chazan
6. Neil Cooper
7. Sheryl Croft
8. Wendy Elgart
9. Ed Feinstein
10. Douglas Feith
11. Larry Friedman
12. Lewis Frohlich
13. Eliezer Galinsky
14. Beryl Geber
15. Shoshana Glatzer
16. Jay Goldmintz
17. Gil Graf
18. Jacob Herber
19. Alvan Kaunfer
20. Amy Kinkade
21. David Krainen
22. Debbie Kram
23. Esther Krause
24. William Kuhn
25. Alisa Kurshan
26. Barry Lewis
27. Carl Mandel
28. Danny Margolis
29. David Meyer
30. Elizabeth Michael
31. Ada Michaels
32. Eugene Milstein
33. John Parritz
34. Luis Salgado
35. Herbert Schlager
36. Bob Sherman
37. David Shluker
38. Judy Shulman
39. Amy Sichel
40. Eliot Spack
41. Alan Stadtmauer
42. Steve Taybeck
43. Helene Tigay
44. Jerry Untermann
45. David Wolpe
46. Alan Workman
47. Rennie Wrubel
48. Michael Zeldin

MEMO

MANDEL FOUNDATION

November 9, 2000

To: Day School Planning Team
From: Barry
Re: Chart of contacts as of November 9, 2000

This is a breakdown of the people we have contacted in our search for candidates:

1. Sitting Principals in Jewish education *	5
2. Lay leaders from day schools	7
3. Congregational Rabbis [†]	7
4. Jewish education contacts [‡]	20
5. Sitting Principals in General education [§]	4
6. Possible prospects	
a. Current day school principals ^{**}	4 ^{††}
b. Congregational rabbis	0
c. Current general education principals	2 ^{††}
d. Day school board members ^{§§}	1
e. Retired school principals	1 ^{***}

* People who have recently (within past 1-4 years) moved from general education to Jewish education, i.e. potential candidates for our program.

† Asking for names of general education principals in their congregations. Also for rabbis they might know who would be interested in our program.

‡ BJE directors, academics, well-connected Jewish educators, etc.

§ **Our primary target for candidates, these have been the most difficult to locate.**

** Who recently made switch to Jewish education.

†† 1) Elizabeth Michael (Los Gatos, CA), 2) St. Paul recently hired person, 3) Providence, RI person via Alvan Kaunfer, 4) Amy Kinkade

†† Wendy Elgart, Steve Taybeck

§§ For schools looking to hire a principal: David Meyer board member from Pressman Academy, LA

*** Eliezer Galinsky (both from general and Jewish education)

Contacts so far:

1. Bob Abramson
2. David Ackerman
3. Dovid Bernstein
4. Stanley Bloomenstein
5. Cincy Chazan
6. Neil Cooper
7. Sheryl Croft
8. Wendy Elgart
9. Ed Feinstein
10. Douglas Feith
11. Larry Friedman
12. Lewis Frohlich
13. Eliezer Galinsky
14. Beryl Geber
15. Shoshana Glatzer
16. Jay Goldmintz
17. Gil Graf
18. Jacob Herber
19. Alvan Kaunfer
20. Amy Kinkade
21. David Krainen
22. Debbie Kram
23. Esther Krause
24. William Kuhn
25. Alisa Kurshan
26. Barry Lewis
27. Carl Mandel
28. Danny Margolis
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40. Alan Stadtmauer
41. Steve Taybeck
42. Helene Tigay
43. Jerry Untermann
44. David Wolpe
45. Alan Workman
46. Rennie Wrubel
47. Michael Zeldin

From: "Howard E. Charish" <hcharish@mandelny.org>
To: "Barry Holtz" <bholtz@mandelny.org>, "Joy Rochwarger" <jrochwarger@mandelny.org>, "Daniel Gordis" <gordis@mandelschool.org.il>, "Dan Pekarsky" <pekarsky@education.wisc.edu>, "Bena Medjuck (E-mail)" <bmedjuck@mandelny.org>
Date: 10/24/00 3:00PM
Subject: Donna Klein Academy, Boca Raton

I spoke with Sharon Kamber (SK) today who is the assistant to the head of school. she mentioned that they do not currently have a principal and that the search is taking place presently. the former principal stepped down last June. SK believes that a general educator would be considered since ads have been put in general public sources including the NY Times. Also we previously learned that the former principal did come from general education. Since she was not a prime contact, I asked if I could speak to the chairman of the board or head of the search committee. She said that she would call these individuals to clear it and get back to me. She did mention that the acting principal is Karen Feller, currently the assistant principal who also is the chairperson of the Jewish Community Day School Network.

Also I have tried reaching Dr. Sheldon Pavel, principal of Central High (Phila.) one of the top public schools in the city. After sending a letter and missing him twice, I have enlisted his assistant's help in garnering some time. This possibility seems very slight at the moment since early this morning the teachers' union declared a strike and threatened to walkout Friday if an agreement is not reached.

From: "Howard E. Charish" <hcharish@mandelny.org>
To: "Bena Medjuck (E-mail)" <bmedjuck@mandelny.org>, "Dan Pekarsky" <pekarsky@education.wisc.edu>, "Daniel Gordis" <gordis@mandelschool.org.il>, "Joy Rochwarger" <jrochwarger@mandelny.org>, "Barry Holtz" <bholtz@mandelny.org>
Date: 10/19/00 2:16PM
Subject: Conversation with Wendy Elgart (WE)

WE was referred to me by Meryl Horowitz, asst. superintendent of the Upper Darby (PA) school system. WE is the assistant principal of Upper Darby High School, the largest high school in PA (3650 students.)

Once again, WE shared misconceptions about the Jewish day school field. She was surprised that I was calling her since she thought that "only rabbis headed up day schools." Similar to all her colleagues that I have spoken with, she was amazed about the upper range of the salaries for principals.

She commented that principals would have a lot of difficulty doing any training during the work week. According to her, they have more flexibility during the summer but there are challenges here as well.

As I explained the initiative, she expressed interest. She found the idea of doing part of the training in Israel very appealing. She also felt that MF would need to give serious consideration to placing the participants once the program ended--the job in hand factor.

Wendy said that she would definitely want to be informed when the launch of the program was decided. My sense is that if we had an application form, she would have requested that we send it to her. I committed that I would keep her advised of the developments.

From: "Howard E. Charish" <hcharish@mandelny.org>
To: "Barry Holtz" <bholtz@mandelny.org>, "Joy Rochwarger" <jrochwarger@mandelny.org>, "Daniel Gordis" <gordis@mandelschool.org.il>, "Dan Pekarsky" <pekarsky@education.wisc.edu>, "Bena Medjuck (E-mail)" <bmedjuck@mandelny.org>
Date: 10/19/00 1:59PM
Subject: Conversation with Dr. Amy Sichel (AS)

AS was referred to me by Helene Tigay, director of the Phila. Central Agency. AS is superintendent-elect of the Abington School district (suburb of Phila.) This spring she becomes the superintendent. I had sent her a letter of request similar the one sent to Lew Froelich. She therefore had a beginning understanding of MF and the initiative.

AS stated at the outset that she did not see gen. ed. principal for two reasons:

- 1) day schools do not pay as well as public schools--"why would anyone leave a \$135,000 job for an \$89,000 one?"
- 2) public education has the same shortage. "What you see, we see."

When I responded to the comment of low, non-competitive day school salaries, she was shocked. She said that she had no idea about the current compensation range. the conversation took a decidedly more positive tone thereafter.

AS maintained that the present principal pool was not a fertile arena. However, she believes that where we have "extreme potential" is with the retirees or near retirees group--those principals who are in teaching 30 years. since many entered the field at age 21 or 22, they are now in their early 50s and would be open to a new opportunity. Furthermore, since day schools are not part of the state retirement system, these retirees are permitted to work there as opposed to a prohibition against working in the state system after retirement. She declared that MF could "pick superb people off the vine."

With regard to getting the word out, AS advised that we do big ads in the metropolitan dailies such as the N.Y. Times and Washington Post and also in trade journals, e.g. Education Week.

AS felt that the curriculum should include in-depth examination of what is expected for educational goals in Jewish studies. "I could spin out the curriculum for social studies, math, English, etc. I would need a real good sense of the standards and goals with respect to the Judaic side."

She asked us to seriously review what the quality of life issues are when a principal make s this shift. These maters have to be dealt directly with the principals whether it be more night meetings, phone calls at home, etc.

She believes that 3 to 4 weeks or even 2 during the summer are "an awfully big ticket" for incumbent principals. This reservation has been consistent when reviewing a proposed timeframe. She thought that a weekend a month may be more feasible.

In the discussion about incentives for participation AS said that having a job in hand would be helpful. She concluded the conversation by saying that until we spoke, she never would have thought of being a principal of a day school as n new career. She did not know of others for me to contact but

welcomed my keeping her informed of the developments.

From: Dan pekarsky
To: Hcharish@mandelny.org, baholtz@compuserve.com, bholtz@mandelny.org, jwarchswarger@mandelny.org
Date: 10/19/00 10:34AM
Subject: Who's interested?

Based on my conversations, here is what I have so far learned about folks who might be interested:

1. Steve Taybeck of the Techiya School near Berkeley is finishing his second year (I think) and might well be interested in our program (though not beginning next summer, due to family-considerations). He is, though, uncomfortable about a long separation from his wife and hopes the program can make provisions that are responsive to that concern.
2. According to Alvan Kaunfer, PENNY STEIN, who has recently taken over as the director of the Solomon Schechter Day School in Providence might be a very good candidate for our program (though she hasn't had administrative experience in general education). He suspects she would be enthusiastic about a program like ours. She has been at her job for two years now. Her only formal training for the job (her degree is in Comparative Literature, and Alvan describes her as 'a good Conservative Jew') was a stint at the Harvard Principals Center.
3. John Parritz and Cindy Rich (of the St. Paul Talmud Torah in Minnesota) think that their administrator, BONNIE ROSS, might be a good candidate for our program. Though she wasn't hired to be the Judaic person, they feel that she might benefit from a program like ours. They felt that it would be important for her, were she part of our program, to wrestle with questions of vision ALONG WITH some of her lay and professional colleagues from the school. They hoped the program would make provisions for that. I have not talked directly with Bonnie.
4. Frank Smizik (of the school in Pittsburgh) is not a good candidate for us. He sees himself as getting the school on a sound footing and then, within the next couple of years, retiring.
5. I have a conversation scheduled with Douglas Feith of Charles E. Smith for next Monday.

CC: pekarsky, Dan

From: "Howard E. Charish" <hcharish@mandelny.org>
To: "Barry Holtz (E-mail)" <bholtz@mandelny.org>, "Bena Medjuck (E-mail)" <bmedjuck@mandelny.org>, "Dan Pekarsky" <pekarsky@education.wisc.edu>, "Daniel Gordis" <gordis@mandelschool.org.il>, "Joy Rochwarger" <jrochwarger@mandelny.org>
Date: 10/17/00 11:00AM
Subject: Conversation with Lewis Frolich

I spoke with Lewis Frolich (LF) 10/16 who is the current principal of Midwood High School at Brooklyn College. Midwood High is winner of the Dept. of Education's Blue Ribbon School award.

Previous to our conversation, I had sent LF a letter describing the work of MF and some details of the initiative. (FYI, it was only after I submitted a request in writing that he would schedule a time.)

As we began discussing the initiative, he commented that it was "interesting but fraught with problems." His main concern was that he did not believe that an incumbent principal could undergo any training for a new position while he/she is on the job. LF said that the principal would stand to lose credibility if it became known, and he did not see how it could be otherwise. His advice was to work with the hiring day school board and convince them of the critical importance of this developmental experience for the new principal. Time for participation in the program should be built into the calendar as part of the hiring process. While he understood the demands placed on the new head, he very much agreed with our conception that the initiative could move a good school to a superior one with the proper education of the principal. "Real staff training must start once you are on the job."

His second concern was the amount of learning days expected for the participants. He commented that most principals work on an eleven month contract and use the twelfth month for other obligations including "personal renewal" and family time. He was therefore somewhat cautious about a four week block in the summer.

With regard to curriculum and related issues, LF indicated several areas that should be addressed:

- 1) Interrelationship of the general and Jewish curricula. "The two must mesh." He advised that the curriculum must align with the values of the school. He said this area is one that general principals do not deal with and need to have spend real planning time understanding and developing.
- 2) Governance: public school principals must understand how to relate to a board of directors and a chairman. LF said that relationships with colleagues are also an issue including the relationship with a co-director and the use and sharing of power and authority. "Boards are a foreign concept" when you are in the public school domain, according to him.
- 3) Fund-raising is a new responsibility for most general ed. principals
- 4) Hiring of staff: "it is completely different in a public system where there is a central hiring structure."

LF recommended that MF consider training other cohorts of educators including assistant principals and the volunteers who serve on boards of directors. He did ask to be kept informed of developments.

From: "Howard E. Charish" <hcharish@mandelny.org>
To: "Dan Pekarsky" <pekarsky@education.wisc.edu>
Date: 10/16/00 10:16AM
Subject: FW: A Think Piece for a Think Tank

Dear Daniel,

I would appreciate your reactions to the beginning conceptions Mike Austin has outlined for the federation execs. initiative.

Many thanks,
Howard

-----Original Message-----

From: Mike Austin [mailto:mjaustin@uclink4.berkeley.edu]
Sent: Thursday, October 12, 2000 1:28 PM
To: Howard Charish
Subject: A Think Piece for a Think Tank

Howard -- I am soooo pleased that you broke through the "log jam" on UJC planning for executive leadership development. While it is still unclear as to how much verbage you want from me or the role you want me to play at the Dec/Jan Think Tank, I've developed the following sketch of what might appear in a discussion paper prepared for the participants. I do not repeat all the excellent background material you prepared in your paper of last Feb/March (?) entitled "Option for Leadership Initiative: Jewish Communal Professionals" which I think you could easily updated as part of the briefing packet for the Think Tank. The draft below needs your specific feedback related to ideas, format, emphases, etc. You'll note in the first section that I refer to the project Noble managed and thought you might want to create a brief attachment to this think piece with summarizes the lessons learned from that experience based on your discussions with him. Also, I am happy if you want to incorporate this draft into your own statement rather than have my name on it. Up to now I've seen my role as developing background think pieces for you to use or not as you see fit. As we move into a more public discussion of Mandell interests, I need you to think about the role you want me to play (e.g. continue to draft materials "behind the scenes" for you to use vs. drafting materials which are clearly identified with me, possibly giving you more room to exercise discretion regarding you own position and the constraints that Mort might want to impose). Either way is fine with me. Just let me know. Looking forward to you comments on the draft, Mike

Preliminary Ideas for a Federation-Oriented Mandel Leadership Program

Michael J. Austin, PhD*
Professor of Management and Planning
School of Social Welfare
University of California, Berkeley

Overview

This discussion paper is designed to foster ideas for consideration at an upcoming Mandell Think Tank on Executive Leadership Development. It seeks to address several priorities identified over the past decade by UJC/CJF

related to identifying future professional leaders and strengthening their capabilities for assuming key positions throughout the federation field. It also seeks to be responsive to the needs of local federations and supportive of national efforts to guarantee that federations survive and thrive in the decades ahead.

The discussion of a future Mandell supported program for executive leadership development is based on several assumptions:

- 1) such a program would be a foundation operated program guided by an advisory board of federation, and related, professionals,
- 2) that professional leadership for the program would operate out of the foundation's national headquarters in New York,
- 3) that the program would take advantage of multiple training sites, including the Principals' Institute at the Harvard University School of Education,
- 4) that it would be a multi-year funded program, and
- 5) that it would be closely linked to, but not managed by, UJC until some time in the future when the newly merged UJC is able to provide the necessary financial and human resources.

This discussion paper is also based on the Mandell approach to leadership development which generally includes elements which address: a) the big questions facing Jewish communal life, b) the use of text-based discussion to explore these questions, c) the use of subject-matter experts to infuse the program with a knowledge, skills, and values perspective, d) focus on role-related real-life applications to contemporary practice, and e) outcomes that focus on developing strong, visionary leaders. Mandell programs in other sectors of Jewish communal life (education) often include the following components: 1) core philosophy, 2) clear statement of needs/problems, 3) criteria for program admission, 4) program goals and outcomes, 5) detailed curriculum and schedule, 6) program staffing, 7) program marketing and communications, 8) post-program components, including evaluation, and 9) program budget and implementation timeline. Some of these components will most likely emerge in the course of the Think Tank discussions.

This discussion paper also draws upon the 1987 Mandell-funded CJF Report, "The Developing Crisis: Findings and Recommendations of the Commission on Professional Personnel" which focused attention on recruitment, training, placement, compensation, role of women, role of lay-professional relations, and the needs of small cities. A recent UJC review of this report reaffirms the centrality of recruitment, retention, training, gender, and compensation issues for the 21st century. In addition, there are lessons to be learned from the Mandell-funded CJF Executive Development Program which operated in the early 1990s (see attached).

Reflecting on the Past and the Present

There are many lessons to be learned from the past efforts to address leadership issues in the federation world. Some of these include:

- 1) need for professional leadership and financial resources to sustain a multi-generational commitment to leadership development,
- 2) need for first-rate teachers and facilitators to identify and respond to the evolving learning needs of professionals (both women and men),
- 3) need for a comprehensive information system to identify and track human resources nationally using the established principles of succession

planning, and

4) need for specialized training materials which address the unique workplace issues facing federation professionals.

Over the past few decades, many of these needs have not been adequately addressed. As a result, the Mandell Foundation finds itself in the unique position of providing some of the "first stones" to rebuild the foundation of professional development in the federation world of North America. While the needs are many and varied, a decision has been made to begin the rebuilding process by focusing on leadership development among middle-management in preparation for top management positions in the decade ahead. The projected retirements of an entire generation of professional leaders over the next decade will have a profound effect on the field if leadership development programs do not begin NOW to anticipate the future needs of federations.

At the same time that there can be many lessons derived from the past, it is equally important to understand the multiple forces at play in the present. As we approach nearly a decade of economic expansion, we also need to assess the consequences of this boom on professional leadership development. The impact can be characterized as follows: 1) entry-level and middle-management personnel have many more opportunities to find employment in the more lucrative for-profit sector, 2) quality of life issues are taking on increased importance which can reduce career mobility, 3) the feminization of the federation workforce (including the continuing growth of dual career households) suggests that local and regional strategies for leadership development may have more payoff than national strategies that require professionals to move around the country, 4) the number of people entering graduate programs featuring Jewish communal service have not grown sufficiently to address the human resources needs of the field, and 5) compensation issues are further impacted by the use of signing bonuses, student load forgiveness, and tuition reimbursement for continuing education in the for-profit sector.

Possible Future Directions

If it is feasible to make the assumption that leadership development is a multi-generational issue which directly affects the leadership succession needs of most federations, then it seems important to envision a multi-pronged strategy for a leadership development program. Leadership development can begin as soon as a professional is hired by a federation. In essence, this has been the role of the UJC Continuing Professional Education Program. If it is assumed that most leadership development is local (like Tip O'Neil's claim that all politics is local), then it seems important to envision a local component to a national leadership development program. For example, if the Mandell program offered regional leadership assessment and training events for professionals in their first 5 years of federation work, the program would serve local needs and identify promising talent to be cultivated, tracked, groomed, and encouraged over the next 5 years of their careers in order to prepare them to enter middle-management leadership roles. A similar effort could be made to track FEREBs. The same could be done for those with 10 years of federation experience. So, if it is agreed that leadership development is multi-generational, then the first question to address might be:

Discussion Question # 1 -- HOW DO WE IDENTIFY AND ADDRESS LEADERSHIP

DEVELOPMENT NEEDS AT THE EARLIEST STAGE OF A FEDERATION PROFESSIONAL'S CAREER?

The second issue relates to identifying promising professionals inside and outside the federation world and methods for tracking and supporting them. Inside federations, promising staff are given increased responsibilities and/or promotions but it is not clear how they are prepared to assume new duties and roles. Some would suggest that we inadvertently exploit the talented by giving them increased opportunities and challenges to address without the educational and mentoring support needed to succeed and pursue higher levels of responsibility.

In a similar vein, it is not clear how we might identify, attract, and support professionals from outside the federation world (despite the CJF pilot project with 5 Alternative Track Program participants nearly 20 years ago). Are new approaches required to identify promising professionals (not just attorneys, dentists, or accountants tired of their chosen field) who bring special qualities to the federation enterprise? For example, some have argued that the closest skill sets to effective campaigning are possessed by Jewish professionals with experience in marketing, sales, and communications. If this is true, how would we target men and women in the for-profit arena (maybe some of our current lay leaders) who show promise for becoming a mid-career transfer into the senior ranks of a federation? All these issues and questions can lead to second question for Think Tank discussion:

Discussion Question # 2 -- HOW CAN THE PROPOSED MANDELL LEADERSHIP DEVELOPMENT PROGRAM HELP LOCAL FEDERATIONS REFINE THE TECHNIQUES FOR IDENTIFYING AND SUPPORTING PROMISING SENIOR MANAGEMENT TALENT FROM INSIDE AND OUTSIDE THE FEDERATION WORLD?

A third major issue relates to the role of current federation executive directors. Given the experiences of another CJF initiative funded by the Mandell Foundation in the late 80's and early 90's related to building the capacities of local federations to design and implement successful Human Resource Development (HRD) programs, it was clear that federation executives saw the need to develop a successful plan and system to enrich and replenish the supply of lay leaders over time. While the need was clear, the commitment and support wavered in many locales. In some cases, it was seen as a "one-shot" deal. In others, it was clear that a federation culture had been built which fostered, over many generations, a commitment to bring in the young and grow them as lay leaders. There are many lessons to be learned from the volunteer HRD initiatives. However, the most striking seems to be the role of the CEO in sustaining a commitment to developing human resources while distracted by many other campaign, planning, and political issues. It is not clear how to assist federation executives in the promotion of professional leadership development. This issue is compounded by the current loss or bankruptcy of effective line and middle-management supervision which used to be the cornerstone of leadership development in federations 30 years ago.

One of the most interesting and challenging ideas to come out of the for-profit arena (based on Senge's work in the MIT Organizational Change Laboratory) involves the transforming of non-profit and for-profit organizations into learning organizations. If federations are to become learning organizations featuring such principles as: 1) supervisors as

change managers (coaching, teaching, facilitating, 2) scanning the environment, inside and outside the organization for trends and new ideas, 3) promoting a culture of learning, 4) promoting a culture of experimentation and risk-taking, 5) promoting learning behaviors of openness and vulnerability, 6) promoting the continuous identification and sharing of best practices, and 7) fostering learning from setting and assessing performance goals at the individual, unit, and organizational levels.

In connection with all these organizational issues, a third discussion question might be:

Discussion Question # 3 -- WHAT SHOULD BE THE ROLE OF THE FEDERATION EXECUTIVE IN FOSTERING PROFESSIONAL (AS WELL AS LAY) LEADERSHIP DEVELOPMENT IN A LOCAL FEDERATION AND HOW COULD THE MANDELL LEADERSHIP DEVELOPMENT PROGRAM PROVIDE THE EXECUTIVE WITH THE NECESSARY TOOLS, TECHNIQUES, AND SUPPORTS?

Let the discussions begin

One of the objectives of the proposed Think Tank is to identify additional questions which should guide the development of the Mandell Leadership Development Program. It is hoped that the initial discussion will feature dialogue based on the principles of:

- 1) multi-generational thinking,
- 2) gender-sensitive leadership,
- 3) regional and national strategies, and
- 4) CEO-related implementation strategies.

Other principles will also need to be developed out of the dialogue.

The future of professional leadership development looks promising if we act creatively and quickly. Now that significant resources are on the table for designing and implementing a truly innovative strategy to address the significant leadership development needs of local federations, an exciting journey awaits us.

*This paper is based on a combination of experiences which include: 1) consulting with federations around the country for the past 25 years, 2) designing/leading an executive development program for public sector senior managers, 3) preparing entry-level middle managers for the human services, and 4) designing/conducting leadership development programs for an array of Jewish communal organizations (CJF, JCCA, Hadassah, Technion, synagogues, etc.).

From: "Howard E. Charish" <hcharish@mandelny.org>
To: "Barry Holtz (E-mail)" <bholtz@mandelny.org>, "Bena Medjuck (E-mail)" <bmedjuck@mandelny.org>, "Dan Pekarsky" <pekarsky@education.wisc.edu>, "Daniel Gordis" <gordis@mandelschool.org.il>, "Joy Rochwarger" <jrochwarger@mandelny.org>
Date: 10/11/00 10:49AM
Subject: Conversation with Stanley Bloomenstein (SB)

SB is the principal of Hebrew Academy of the Five Towns and Rockaway (HAFTR) high school. He began his position in September. We got his name from an article in the NY Times announcing his hiring . David Shluker, former consultant to orthodox day schools at JESNA and now also at HAFTR, was my lead to him. Formerly SB was the principal of the Bronx High School of Science.

For my conversation I used the protocol that Bethamie Horowitz created for the focus group of general education principals who had made the change to Jewish day schools.

SHIFT

SB felt that there was not much of a shift in his move to HAFTR. "The over-riding focus is the same--working with teenagers, similar curriculum, behavior problems. The overlap is tremendous. I had a smooth transition."

COMPARING SETTINGS

"Public education has systems that work, not as much so with day schools, e.g. discipline codes.

Yeshivas are like 'mom and pop shops.'" SB saw that the most prominent issue he is facing now is the lack of fluidity in the program tracks. He said that at HAFTR it is all or nothing--either you have all honors courses of you have none. "The real world does not operate that way." He identified this procedure as a real self-esteem problem for non-honor track students.

Although he stated that it is too soon to get a handle on the parent body, he did say that the parents need more "customization." I understood this comment to mean that they needed/demanded more attention.

CHAIN OF COMMAND

The high school has two principals, both of equal status. One does not report to the other. SB heads up "academics" and a rabbi is in charge of Jewish studies. SB reported that he was comfortable with this structure and works very closely with the rabbi.

REASONS FOR SWITCH

- 1) Bronx High School required a 1 1/2 trip each way. HAFTR is five minutes from his home.
- 2) He was of retirement age.
- 3) SB is an observant Jew and therefore was motivated to be in a Jewish setting that mirrors his life style.

GENERAL OR JEWISH EDUCATOR

SB sees himself as both and "enjoys both" the general and Jewish aspects of his position. "I espouse both sides." He saw himself as an educator in a Jewish school applying his public school experience and a Jewish educator who promotes "limudei kodesh."

PERCEIVED NEEDS

SB advised that the principal must have skills in dealing with groups of students who are undisciplined. He/she must also know how to deal with the parent body. This topic launched SB into a reflection of his own training. He was the head of teen camp at the NJ Y Camps for a number of years. He stated emphatically that all the skills he learned, he learned at the camp. He had great admiration for Matt Elson and Joe Schwartz who were two of the Y Camps former executive directors for whom he worked.

LEADERSHIP

SB commented that the principal must represent the philosophy of the organization. "The leader better be at the level of the school and not just an educator in the school. He/she must be a role model and be part of the movement with which the school is affiliated." The principal must also have community skills according to SB.

MANDEL INITIATIVE

He did not see himself as a candidate for our program. He emphasized that for him 90 % of the job is the same, that he was just changing gears.

FINAL COMMENTS

SB said that it was "fun" talking about the day school issues. He inquired about the possibility of a MF grant to HAFTR. I reiterated the fact that MFNA is an operating entity. When he asked me to describe some of our programs, he became interested in TEI. I referred him to Gail who will provide him with TEI background information. He also gave me the name of a principal that he thought I should speak to as well. I have now set up an appointment with Lewis Frolich who is at Midwood High School (another one of NY's prestigious high schools) for October 16.

MEMO

MANDEL FOUNDATION

October 3, 2000

To: Day School Principals Planning Team

From: Barry

Re: Update on where we are

Howard asked me to review our current situation, reading through the various reports received up to now. Let's say the end point for this report is up to Erev Rosh Hashanah 5761!

1. The issue of current assignments:
 - a. I think we need a phone meeting to regroup where we currently are—I still have Bena's memo of 9/21 and I'm not sure the current status of things. Can we find time for a phone meeting this week to check in?
2. What are we proposing?
 - a. Following our Harvard meetings and given our conversations with the colleagues in Israel, the current agreed upon plan is to focus efforts for a Principals Program on a) general school principals who might be able to transition to Jewish education and b) rabbis (we are mostly talking about congregational rabbis here) who might want to transition to day school principaling.
 - b. I will not review the various arguments pro and con for these groups, nor will I review the other issues that we have all discussed. Suffice it to say that our emphasis has been on recruitment over the past few weeks. The Harvard meetings, however, highlighted for me the need to remember that there is a lot of work to do on structure, curriculum, and faculty for the program. We cannot forget that just getting recruits does not a program make!
3. Recruitment efforts
 - a. Following upon the lines above: Our focus has been in two directions—finding general school principals and finding rabbis.
 - b. We have tried to do this by directed phone calls. The calls, as they say in the headhunting business, were aimed at "contacts," people who weren't themselves likely to be possible candidates for our program, but who were well-connected enough to lead us to "prospects," people who could be actual participants in such a proposed program. Contacts included BJE directors, rabbis, etc. In some cases we thought that certain contacts might themselves end up as "prospects." (As sometimes happens with search

- firms.) Such ambiguous types (i.e. both “contact” and potential “prospect”) were represented by the six people in Bethamie’s focus group and some of the rabbis on the list.
- c. Directed phone calls were aimed at another constituency as well—we tried to contact lay leaders who were chairing search committees in day schools (or presidents of day schools). The goal here was to see if such people could be interested in developing a partnership by which the Mandel program would train their principal, if that principal were coming from outside the Jewish education field.
 - d. A third approach was also discussed: sending a letter on the email lists of rabbis to recruit for the rabbi part of the program. A draft of that possible “advertisement” is attached at the end of this memo. Reactions anyone? (I got reactions from Joy which have been incorporated in the current draft.)
4. What have we learned so far? Here I will try to make some summary comments about the reports we’ve received. I’m not going to heavily reference this to the specific reports, in the interests of saving time and space here:
- a. To me the most striking thing reading all the reports is how many people think the program is such a great idea and how few prospects they have for us! It leads me to think that *after the fact* when people think about the people currently in the day school principal jobs or the difficulty finding people to fill those jobs, they think that such a program would be a good idea (or would have been a good idea). But *before the fact*, as it were, they don’t have lots of actual candidates to give us.
 - b. On the prospects front for general school principals: Howard did get some names of local school principals from rabbis and we ought to get a better sense of our situation once we see what they have to say when actually contacted.
 - c. The people in our original focus group—with one exception!—didn’t think that our program was for them. They were already in their jobs and weren’t convinced that they would have a lot to learn at this point. For me this raises another interesting predicament: we have a narrower range of opportunity than we may have originally thought in terms of the general education principals: a) they can’t have been in their new jobs in Jewish education too long or they won’t “need” us (their view); b) they can’t be too young or they won’t want to give up their excellent pension plans in public schools (i.e. they need to be “vested”) and make the switch to Jewish education. Everyone so far confirms our original finding: the people making the switch weren’t looking to make a switch to begin with, so we are in the business of getting people to “change careers” not just change jobs.
 - d. So far we haven’t gotten very far with search committees and lay people. Once again, it’s a great idea that Mandel has, but once again they aren’t offering us much in the way of prospects. Michael Zeldin’s thought that unless we offer the search committees something (like being their head hunters, etc.), they will view us as well-meaning but mostly irrelevant static to their “real” job, finding themselves a school principal.

- e. Rabbis: we did find some interest from rabbis that Howard spoke with, or some sense that their rabbinic colleagues might be interested. This was interesting news and needs further exploration. The email ad might be the right thing.
 - i. I do have two concerns about the rabbis' reactions. First, I'm not sure that they "get" the job of being a day school principal. It isn't about teaching! If they want to get out of the politics of synagogues into "pure" teaching, being a day school principal is the wrong job! (Ironically, they would be better off as senior Jewish educators at JCCs for that kind of change.)
 - ii. Second, I'm somewhat concerned about the reactions from JTS and HUC if we go after Conservative and Reform rabbis. The issue of competition from these two places seems to be significant. By keeping our focus on general education principals we were able to offset the JTS concern, but HUC was annoyed that we were stepping into their turf in that arena. Going after denominational rabbis may be waving a red flag. (Of course, we can simply say that we're not concerned about this competition issue and that the Mandel Foundation can do what it deems best, irrespective of what others are doing. At any rate, we should know what we might be getting into.)
 - f. It's pretty clear that Orthodox day schools are not interested in hiring principals from general education to lead their schools. (Running general studies would be a different matter.) However, if we can access their rabbis, we may have a shot at recruiting some for day school jobs.
 - g. Judy Shulman's (and other's) comment that a program that runs for a month in the summer would have trouble attracting current principals is something we need to think about. Once again, it would help a lot if we had either a carrot or a stick to encourage people to give up their vacation and come.
5. General conclusions
- a. My own feeling is that the work so far confirms that recruitment is not going to be easy, that there is a general feeling that the program proposed is a good idea, but that the pool of possible applicants may be small or hard to reach.
 - b. I don't think that the story is done yet, however. We still need more work to see if we can get to actual prospects. For me the biggest frustration is that the group that I was most excited about (principals from general education) and that I thought would give the best and least controversial launch for the Leadership efforts of the Mandel Foundation seem to be the most difficult to find.

Possible email to rabbis, from Howard:

Good

The Mandel Foundation

Dear Rabbi,

I'm writing on behalf of the Mandel Foundation, a major foundation which, over the last 15 years, has been deeply involved in the improvement of Jewish education in North America, in Israel, and around the world. It is, for example, the principal funder of the Jerusalem Fellows program, whose graduates are well-represented among the leaders of Jewish education in North America and around the world.

The foundation is currently considering launching a new initiative aimed at addressing a major need in North American Jewish education—the shortage of qualified personnel to lead day schools. This wide-spread phenomenon represents a crisis in contemporary Jewish education and the Mandel Foundation is thinking about ways that it might respond to this need.

In addition to managerial skills,

The qualities necessary for leading a day school include a knowledge of Jewish life and the Jewish community, an ability to work with people, and, of course, strong knowledge of Jewish content. These qualities are often found among rabbis and the Foundation is investigating creating a training program for rabbis which would prepare them for positions in day school leadership roles.

This would be an elite program--conducted by the Foundation at an outstanding academic institution. The program of study would allow participants opportunities to work on key issues of Jewish day school education: the question of vision, the unique characteristics of Jewish day schools, Judaica knowledge appropriate for a day school principal, etc. Such a program would take place during the summer and in meetings during the academic year. We have already had discussions with Harvard University's Philosophy of Education Research Center as a possible venue for such a program. Other universities have also expressed interest in being the site for such a program.

*Repeat
Phrase*

I'm writing to see if you might know of individuals who would find the move into Jewish education of interest. We would be interested in names, etc.

(1) Minneapolis

(2) Milstein

(3) ~~13~~ Kaufman

(4) Los Angeles - Pressman

Major Problem

(1) Can't go any further w/ them.

From: "Howard E. Charish" <hcharish@mandelny.org>
To: "Joy Rochwarger" <jrochwarger@mandelny.org>, "Daniel Gordis" <gordis@mandelschool.org.il>, "Dan Pekarsky" <pekarsky@education.wisc.edu>, "Bena Medjuck (E-mail)" <bmedjuck@mandelny.org>, "Barry Holtz (E-mail)" <bholtz@mandelny.org>
Date: 9/28/00 3:05PM
Subject: Conversation with Judy Shulman

Judy is chairing the search committee to find a principal for a new community high school in Palo Alto. The process began in March. The original plan was to have the position filled by now and open the school in September 2001. Although they are using a head hunter, they have not found the right candidate. Judy's comment was that "it's been very hard." They have developed a mission statement, have had video conferences and phone interviews with prospects but have not yet been successful. Therefore, the board decided to delay the opening of the school until 2002 with the expectation that a principal will be in place in 2001.

Judy mentioned that their vision of a principal was Daniel Lehmann. They want someone who brings experience in high school administration and also experience in Judaica. The salary range is \$150,000 - 200,000 depending upon experience. There is also a housing package because of the high residential cost in the Palo Alto area. Please note that Judy asked that we not circulate the compensation numbers outside our group. She said that she also coordinated the search for a middle school director that was successful since they hired a general education, higher education professional. He was paired with a strong Judaica head-- a credible model according to Judy.

With regard to the Mandel initiative, Judy thought that it would be "fabulous." Her remarks addressed the notion of rabbis as a target group whom she felt would not know enough about how school function, their politics, the meaning of high stakes assessments, instructional materials development and avoiding the micro-managing of the classroom. She underlined the necessity to incorporate practice elements in the curriculum. If indeed MF recruited both general educators and rabbis, she recommended having two tracks which would have shared core aspects. Judy believed that a four week summer session may be problematic for general education principals who in California work on an eleven month contract and us the twelfth for vacation.

Judy was interested in how our program developed and wanted to be kept informed.

From: "Howard E. Charish" <hcharish@mandelny.org>
To: "Joy Rochwarger" <jrochwarger@mandelny.org>, "Daniel Gordis" <gordis@mandelschool.org.il>, "Dan Pekarsky" <pekarsky@education.wisc.edu>, "Bena Medjuck (E-mail)" <bmedjuck@mandelny.org>, "Barry Holtz (E-mail)" <bholtz@mandelny.org>
Date: 9/28/00 10:02AM
Subject: Conversation with Sheril Croft

I spoke with Sheril Croft 9/22. She was referred to me by Ada Michaels and began this year as the community day school principal in Fort Worth, Texas. Previously she was a hospital administrator for eight years. She had walked into the federation office last year looking for more involvement but "did not expect such a shift" in her life. She started working June 26.

The school is 20 years old. It had had an interim director for five years who was the assistant principal, someone who has a Judaic background, an Israeli and parent but no credential or administrative experience. Sheril specifically said that her administration background was very appealing to the board. At this point the focus of her efforts are in business/financial matters and marketing (increasing enrollment) because "Jewish studies are holding their own."

The enrollment of the school is small--61 in preschool and 46 in day school. There are seven grades but many grades are combined. Sheril also oversees a summer day camp and an after school program--what she describes as a "12 month position." Sheril said that ideally the board would like her to have exposure to Judaic content and development experiences as a principal. However, she cannot see herself embarking on an intensive program now. She did say that she would like to take advantage of weekend or several day opportunities. Currently she depends on resources from the schools in Dallas.

From: "Howard E. Charish" <hcharish@mandelny.org>
To: "Joy Rochwarger" <jrochwarger@mandelny.org>, "Daniel Gordis" <gordis@mandelschool.org.il>, "Dan Pekarsky" <pekarsky@education.wisc.edu>, "Bena Medjuck (E-mail)" <bmedjuck@mandelny.org>, "Barry Holtz (E-mail)" <bholtz@mandelny.org>
Date: 9/22/00 10:55AM
Subject: Rabbinic conversations

The following conversations are summaries of my contacts with rabbis in Philadelphia:

Neil Cooper, Beth Hillel/Beth El (Conservative)

Neil is also the chairman of the Delaware Valley (Phila., Delaware and Southern NJ) region of the Rabbinical Assembly. He was enthused about MFNA engaging in the initiative for general educators. He gave me the name of one of his congregants who is a public school principal for me to contact. With regard to rabbis as principals he thought it is a good concept. "Lots of rabbis are not happy in the pulpit and love to teach. That's what they want to do and don't find this out until they are in the pulpit." Neil's observation may counter the idea that if rabbis really wanted to go into education, they would have done so right out of the seminary. It may mean that after a number of years, some rabbis will be more "ripe" for this experience, more so than they were at an entry level to mid-level point of their career. Neil did question how our rabbinic initiative would differ from the program at JTS. I gave him background on the Mandel approach to leadership education and also indicated that we have had a discussion with Aryeh Davidson.

Jacob Herber, Har Zion (the largest Conservative synagogue in Phila.)

Jacob is the newly appointed senior rabbi. Jacob responded positively to our initiative. He provided one contact who is either a principal or assistant principal in the Phila. public school system. He also felt that targeting rabbis was a good idea. He has long believed that the rabbinic perspective is lacking in the day school environment. He said that there is a dearth of educators who can convey a sense of tradition. "Having a rabbi as head of school helps alleviate the problem."

David Krainen, Keshet Israel, a growing Conservative congregation in Chester County

David provided the name of one congregant who is the vice principal in the West Chester public school system. He liked the idea very much of targeting rabbis. He said he knew a number of colleagues who are keenly feeling the sacrifices of working on Shabbat and hagim who might find this career shift attractive. Originally, he said that there would be a "fair" amount of interest, but as the conversation proceeded, he thought there might be "a lot" of interest among rabbis.

I have one conversation scheduled for Thursday with David Ackerman. I also have a call into Bill Kuhn, senior rabbi at Rodeph Shalom, Philadelphia's largest Reform synagogue. It is interesting to note that none of the rabbis was aware of the increasing trend by day schools to hire general educators

as principals. All expressed dismay about the situation.

From: "Joy Rochwarger" <jrochwarger@mandelny.org>
To: "Howard E. Charish" <hcharish@mandelny.org>, "Daniel Pekarsky" <pekarsky@education.wisc.edu>, "Barry Holtz" <bholtz@mandelny.org>
Date: 9/11/00 10:26AM

I have made a few phone calls, but unfortunately none of them have been as fruitful as Dan's.

Saul Andron - He will be sending us the directory of Bureau Directors early this week

David Schlucker's principal of HAFTR, home phone #:
 718-868-0039
 Ada Michael's number: 757-671-1600, x124

Rabbi Jay Goldmintz - Administrative position at Ramaz High School - doesn't know anyone personally but suggested that we get a list of participants in the Harvard Program. Also that we call Yossi Prager at AviChai and see if they know of anyone. He is contacting a principal of Yeshivat Har Torah, who was in the Harvard Program, to see if he can make any suggestions.

Rabbi Alan Stadtmauer - Principal of Yeshiva of Flatbush - had a lot of criticism for the program. Doesn't really think that a program can be designed that will professionalize the position of Jewish Studies principal. He did however make two recommendations, both of which I sent out to you last week,

Debbie Kram - former Jerusalem Fellow, Director of Ma'ayan, Institute of learning for Women in Boston - will keep her ears open

Esther Krause - Principal of Ma'ayanot in New Jersey - doesn't know anyone but also mentioned getting the Harvard list

Elliot Spack - AS had suggested that we turn to CAJE for a list of people who are day school principals by day and Talmud Torah principals at night. Elliot says: lists like these don't exist. CAJE members don't list all their professions, only names and addresses and maybe one position. Also, it is not likely that there is ANYONE who is a principal of a secular school during the day and also in the evening. maybe teachers in the secular system who have a second job as principal of Talmud Torah. He suggested that we speak to the Bureaus, since the Principals Council convenes under the aegis of the local Bureau. We need to contact Rabbis in communities who might know who the J. principals are. Elliot was very wary of how to go about compiling these lists. He suggested that Howard convene a group of people like himself, who will sit and brainstorm together to compile a list of J. Secular principals who would be willing to retrain and retool. Another suggestion: create some kind of executive search firm that will be divided amongst different precincts, to comb lists of secular study principals, figure out who's Jewish, find people in the community who know them to find out about the quality of their positions, and then move on from there.

Rae Levy - Agnon School - former principal of the school, made the switch. He is now in St. Paul. Danny Marom will make initial contact with him for me. Current principal - Joel Ideson - is in need of serious training. has read the Agnon document and now agrees that he needs a superb J. Studies Principal. Danny M. has also mentioned a teacher - Diane Lavin - who was a

Fred Hochbaum
 Milt Miller

lay leader, now a teacher and has good potential to become a principal.
Worth investigating?

final question - are we willing to look at principals of supplementary
schools?

Joy

Joy Rochwarger
Mandel Foundation
212/532-2360
jrochwarger@mandelny.org

From: Dan pekarsky
To: Pekarsky
Date: 9/11/00 7:25AM
Subject: Elkin information

Memo to: Principals initiative group

From: DP

RE: Information from Josh Elkin

I had a lengthy conversation with Josh Elkin. Most of it focused on the names of pertinent institutions and individuals, but he also used the occasion to reiterate his own view that three summers is too long for the kinds of people who are appropriate for this program. In his view, two summers (with a maximum of three weeks in each of them), with some stuff in between, is the maximum we should be considering. An overly long program is likely, he thinks, to undermine our ability to generate a clientele.

He thought we would be wisest to develop something along the lines of the Harvard Principals Seminar, which he said involves two two-week sessions. He also suggested that the Professors group that CIJE used to run is a model that might be appropriate for this group of senior, well-tested individuals.

He also reiterated his confidence that, suitably designed, the program would attract a clientele, as well as his belief that it could be a very important program. And he was careful to communicate his strong interest in helping us out. In this connection, he mentioned that in mid-October PEJE will be sending out a mailing to the day school world, and he would be happy to include in this mailing something about the program we're planning (we could, he said, give him the language we wanted).

Josh had very little information to give us about schools that are currently looking. He suggested that the best route towards this information would be to contact the people mentioned in the summary of our meeting with him (folks we're already trying to contact); but, as you will see, in the course of our conversation, some ideas concerning schools that are searching did emerge.

Josh didn't have an address or phone for Ada Michaels, although he thinks that she may be in Norfolk. He suggested we call JESNA to get her number.

In our discussion, he broke down schools by denominational affiliation. Under each category there is information concerning both schools that have recently searched and schools that are now searching.

COMMUNITY SCHOOLS

1. The Agnon School (216-464-4051) hired someone from out of general education. [Based on our information, he could use a program of the kind we are offering!]
2. The Austin Jewish Community Day School (512-467-0707) hired someone from general education. Ken Platt (I'm not sure if that's the principal or the lay leader; need to confirm this.)
3. Beit Rabban (Manhattan) hired someone from general education [[probably not appropriate for our program.
4. The David Posnack Hebrew Day School, Plantation, Florida hired retired superintendent, Larry Friedman (953-583-6100. He's not appropriate for our program; but he's been terrifically effective and a great potential resource for us.
5. Donna Klein Jewish Academy of Boca Raton, Florida is looking for a Head of School (561-852-3320). The old director, Dan Kahn (also out of general education, has stepped down. This is a big promising place. Worth talking to Kahn, who is now in NY.
6. Heritage Academy of Longmeadow, Ma. 413-567-15217. This school has recently hired Richard Holtzman, a retired superintendent, now in his second year.
7. The Jewish Day School of Metropolitan Seattle (425-641-3335). According to Josh, they recently completed a search, and he suggested speaking to the Chair of the Board (but didn't have a name).
8. The Talmud Torah of St. Paul (651-698-8807) may be searching.
9. Tarbut V'Torah High School, Irvine, California. Its head of school (Ahuva Halverstein) may have recently left. Phone number is 949-509-9500.

10. The Techiya Day School in El Cerrito near Berkeley (510-233-3013). Dr. Rivera Singer died, and a new person (from Jewish ed.??) was recently hired.
11. The New Community High School in the Bay area (near San Francisco) recently announced the hiring of a general educator-type as head of school.
12. Houston High school hired a 35-year-old lawyer, who is being mentored by a retired superintendent.
13. Sand Diego Jewish Academy (619-457-5755). Contact Larry Achatel or Jeff Davis.

CONSERVATIVE DAY SCHOOLS

1. Charles E. Smoith School (301-881-1400) is searching for a director. Main phone number is 301-881-1400. The contact person: Douglas Feith, Chair of Board. Josh will mail us his number.
2. Solomon Schechter of Chicago recently hired a middle school director from general education. His name is Bob Teitel. This is Charolette Glass's school. (847-498-2100). Worth talking to Phyllis Fischel, member of recent search committee; tell her that Josh said to call (847-509-1999).
3. West Hartford (Carl Mandel), 860-561-0700.
4. Yavneh Day School, Los Gatos, CA. The principal, Elizabeth Michael (408-358-3413) was at Bethamie's focus group.
5. Community Day School of Pittsburgh (412-521-1100). Within the last two years, they have hired a public school principal who had principalized a public school around the corner.
6. Speak to Beth Ostrow, Chair of board, Solomon Schechter of Nassau Country (516-334-0404), and tell her Josh said to call. They are searching! Ostrow is hoping to the principal of the Great Neck High School, Bernie Kaplan. He, too, would be a good source of information.

REFORM

1. Speak to Michael Zeldin

and engage

RECRUITMENT PLANNING

MAJOR CHALLENGES

1. clarifying the challenge; developing the plan *assign*
2. identifying a recruiter (and, until one is found, dividing up recruitment responsibilities)
3. identify and contact *prospective candidates* clients
4. Identify and contact educating institutions in search of educational leaders
5. Develop materials to be used as part of the recruitment effort
6. Plan an informational seminar

ADDRESSING THE MAJOR CHALLENGES

Clarifying the challenge/developing the plan

1. Holtz/Pekarsky conversations
2. Conversation with Josh Elkin regarding our preliminary conception of the recruitment plan, as well as concerning some possible leads and division of labor.
3. Conversation with Danny Gordis and ?????? about our preliminary conception of the recruitment plan.
4. Develop a division of labor between Barry, DP, Joy, and Josh.

Identifying a recruiter

1. Track down Josh Elkin's leads
2. Other promising candidates and/or resources

prospective

Identifying possible candidates

1. With the help of Josh Elkin and JESNA (and denominational educational leadership??), develop a list of superintendents and principals who have made the switch into Jewish education and who can help us identify prospective candidates.
2. Conversations with the individuals identified in #1 in order to identify prospective candidates. (Note that in some cases these individuals may themselves turn out to be appropriate candidates for the program, and the conversation may serve to whet their interest in it.)

3. Develop a list of BJE directors, rabbis, Jerusalem Fellows, and others who can help us identify Jews who are principals and superintendents in private and public schools in major metropolitan areas.
4. Call the individuals specified in #2 in order to identify Jews who are principals and superintendents in private and public schools in major metropolitan areas.

Identifying institutions that are in process of searching

1. Identify and contact all mainstream day schools and projected day schools **or:** identify all those that are in search
2. **via:** conversations with Josh Elkin, central agency personnel, rabbis, Daniel Lehmann, JESNA, denominational institutions (if feasible)
4. Determine whom in these institutions to speak with (probably lay leadership) and what we want to convey to them and to elicit from them.

CONTACTING CANDIDATES

Holtz and/or Pekarsky and/or Elkin contacts promising individuals and interviews them about the following: 1) Might they be interested? 2) Do they know of others who might be interested? 3) Would they be interested in attending **a seminar** at which this option might be more fully explored?

CONTACTING INSTITUTIONS

Holtz and/or Pekarsky (until a recruiter arrives) makes the contact with appropriate institutions with the hope of eliciting a strong interest.

INFORMATIONAL MATERIALS

Develop a very simple brochure or pamphlet that describes the Mandel Foundation, the need and the opportunities, the program, and application process.

DESIGN AN INTRODUCTORY SEMINAR DESIGNED TO INFORM INTERESTED PARTIES CONCERNING THE WORK AND EDUCATIONAL APPROACH OF THE MANDEL FOUNDATION, NEEDS AND OPPORTUNITIES IN THE FIELD OF DAY SCHOOL LEADERSHIP, AND THE CHARACTER OF THE PRINCIPALS INITIATIVE.

QUESTIONS

1. How hush-hush should this be?
2. Is it more likely that the program will develop into what we hope to see if we allow for the possibility of beginning with a smaller group than we ultimately

hope for? If so, would the Foundation support such an idea? Is there a minimum number needed for a "Go"?

3. What do we want to convey to prospective candidates, and how committal can we be to them??
4. What do we need clarity on before we enter into conversations with candidates or institutions? E.g. financial arrangements (stipends)? What do we offer schools that partner with us?
5. Until we find a recruiter, who will carry out the various tasks described in this plan? Is Joy available to help with the recruitment effort? Can we find somebody else who can help identify promising individuals (with the understanding that DP will follow up)?

TO: Howard Charish
FROM: Daniel Pekarsky
RE: Holtz/Pekarsky meeting with Josh Elkin
DATE: Aug. 24, 2000

We had a two and a half hour meeting with Josh Elkin in Boston this week organized around a three-fold agenda: 1) making further progress on a recruitment plan; 2) getting a sense of his/PEJE's ability to have a role in the actualization of this plan; and 3) eliciting Josh's response to the program we have conceptualized. The meeting was very productive, especially in relation to the development of the recruitment plan. Whether or not the the approach we entertained at the meeting will, on reflection, still seem wise, sketching it out may serve us as a useful springboard to the next stage of our deliberations concerning how to approach recruitment. Below is a summary of the meeting's main points:

1. There was a shared sense among us that, ideally, the new program would focus on individuals who had functioned successfully as educational leaders in general education (principals of private or public schools, superintendents). Josh felt that there is a pressing need for individuals who have managed complex educational systems – individuals who, by virtue of their experience, would be up to the challenge of taking on some of the larger, more complex institutions in the day school world (e.g., Charles E. Smith, or the Solomon Schechter School in Newton).
2. Josh shared our own uncomfortableness with the idea of going after individuals whose experience is outside the world of education, and he was very uncomfortable with the idea of our trying to focus on the populations that existing programs are currently working with, e.g., individuals currently serving as educators in Jewish educational settings who are looking to move up into positions of day school leadership.
3. As our conversation unfolded, we explored and developed some interest in the idea that, especially in the early phases of the program, the principal focus of recruitment should be on institutions that are seeking to hire educational leaders. Along the lines we had discussed in some of our earlier meetings, the idea would be for these institutions to do the principal work of identifying promising individuals with an interest in making the move into Jewish education,¹ and to make participation in our program a condition of their hiring these individuals as their educational leaders. Note that if this model is adopted, this would not preclude accepting appropriate individuals who approach us on their own with an interest in our program, but we would not invest heavy energy or resources in the difficult challenge of trying to identify and recruit them. As what follows

¹ Although these schools would bear the primary responsibility for identifying suitable individuals, schools interested in participating in the Mandel Foundation Principal's Program would have the benefit of a mentor associated with the Foundation to give them some guidance in the Search process.

suggests, much of our meeting with Josh played out the implications of this approach. Again, whether this approach is really wise is a question we need to seriously consider.

4. If the model described in #3 were adopted, the search-effort would be two-pronged. First, a letter or brochure would be sent out to the Board chairs of the 500 or so non-Haredi schools.² The letter/brochure would encourage them to think about individuals whose experience as leaders is in general education when they need to fill a senior position; and it would give them some information about the Mandel program. Second, using the sources available to us, we would identify and contact schools that are now searching; Josh estimates that there are currently 50 to 75 such schools.³ (The idea of an informational seminar aimed at prospective candidates and/or at lay leaders of day schools dropped off our screen.)
5. Josh liked the idea – I’m not sure whether he or Barry proposed it – of convening a focus group made up of the Chairs of the Boards of schools that have hired educational leaders from the world of general education. In addition to learning important things, this focus group could offer two other benefits. First, it would be a source of good quotes concerning the advantages of hiring someone from out of general education that we could use in a brochure or other recruitment materials. Second, through the focus group we might be able to identify individuals whom we could enlist in the recruitment effort. For we came to feel that if the principal focus of our recruitment efforts are the Chairs of search committees, it would be very useful to enlist one or more lay leaders from schools that had hired general educators to meet with or consult to these search committees (See #7 below.)
6. A program that relies on educating institutions to identify its clientele has to face the likelihood that some of these individuals will be ill-suited to the program. This is especially true of a Mandel Program, since it will definitely be tilted towards a population that has the ability and desire to participate in an intellectually challenging program that puts the struggle with important ideas at the center. We all agreed that it would be unwise to admit individuals who are ill-suited to the program. In cases where we felt a candidate to be ill-suited, the

² This figure includes Modern Orthodox schools. Based on his work, Josh believes that these schools would also be open to the possibility of hiring individuals from out of the world of general education.

³ Some schools that searching will be very easy to identify, e.g., PEJE schools and schools that are very well-known like Charles E. Smith. Others can be readily be identified via various umbrella organizations. For the Orthodox world, we should contact Joshua Fishman or David Bernstein. For the Modern Orthodox: Jeremiah Untermann at Y.U., who directs the Association of Orthodox Modern Zionist Day Schools. (an association that includes some 60 or 70 schools). Josh suggested that we also contact Untermann’s predecessor, David Schlucker. For the Conservative movement: Bob Abramson. Reform: Michael Zeldin, or Lenore Kipper (past chair of the PARDES network). Paul Flexner would be a good source of information about community-schools, but we should be ready for him to express unhappiness with the idea that we are going ‘outside the existing field’ to find new principals. An alternative to Flexner: Ada Michaels in Virginia, who is Chair of the Community Day School Network.

institution would have to identify some other strategy through which the individual would undergo the kind of professional growth that would equip him or her to lead a Jewish day school.

7. We spent some time discussing the subject of a recruiter. Working on the assumption that the recruitment strategy would focus on institutions and that we would be pitching the primary recruitment effort at the lay boards and leaders of these institutions, we explored and developed some interest in the idea that we should try to identify and, if possible, employ a compelling individual who has functioned as a successful lay leader (ideally of an institution that has employed a principal from out of general education). Such an individual could function as a kind of mentor or counselor to search committees. The desired individual would need to be an intelligent, credible and compelling presence who buys the Mandel approach. The kind of person we were imagining: someone like Bonnie Hausman or Elissa Doctorow. The Focus Group aimed at lay leaders of schools that had hired general educators (the same schools from which the principals came for Bethamie's focus group) might prove an effective way of identifying this individual. If it turns out that we can't find a lay person like this who would be willing to take on a paid position with us, a fallback position might be to identify a few such leaders (like Michael Rosenzweig) who might, on a volunteer basis, be willing to help us enter into meaningful conversations with Search Committees. Whether this general approach is meritorious – and if not, what would be a more sensible approach – is a matter we should take up very soon.
8. If we are unable to find this kind of individual to take on the major recruiting responsibility, we thought it would be wise go after a former day school principal who is sympathetic to the Mandel approach – ideally someone who originally came out of the world of general education. Josh suggested that we contact Larry Friedman (a retiring day school principal, formerly a Superintendent, now in Florida). His job would be to convince schools that they would be wise to look to general education to find strong principals, as well as to convince potential or actual candidates that this would be a good route for them.
9. The ideal recruiting team would include: a) a strong administrative assistant (a Sarah Feinberg or Bena Medjuck-type; b) either a former lay leader (see #7 above) or a former school principal (seen #8 above); and c) high level Mandel Foundation personnel (Barry and/or Dan)
10. Josh seems confident that there would be a clientele for a Mandel program aimed at educational leaders from out of the world of general education and that the program could make a valuable contribution. His main concern: the possibility that length of the Mandel Program would dissuade potential candidates. He felt that that if the program were at Harvard, this would be a big

plus, but perhaps not enough to draw in the candidates we would hope to attract. Josh suggested three ways of addressing this problem. These are summarized in #s 11, 12 and 13.

11. Include some incentives, or some perks that would make the program family-friendly (for example, including two round-trip weekend tickets each summer for the spouse to come to Boston for weekend visits).
12. More radically, Josh encouraged us to seriously consider eliminating the third summer. A two summer program, accompanied by gatherings and mentoring during the year, would, he felt, be much more attractive to prospective participants. It was suggested in this connection that if the program required its graduates to participate in annual colloquia, we would, from a content-perspective, have the opportunity to make up for the lost summer over several years.
13. Josh also suggested that we consider a two-tier program, one more intensive than the other. We had serious concerns about this suggestion, a principal one being that given the choice, most candidates might well choose the less demanding of the two programs.
14. In response to a question concerning whether the Mandel Foundation's interest in a Principals Program is widely known, Josh indicated that he didn't know, but commented that Aryeh Davidson does know. As best he could tell, Aryeh is comfortable with the idea of a program that goes after general educators and hopes that, once established, there would be collaboration between the Mandel Program and others in the field.
15. Josh emphasized that PEJE is eager to offer us a lot of support and advice in the development of this initiative, as well as to talk up the program and to lend its name to our efforts to recruit. He indicated, though, that he and his organization were up to their necks in work at least over the next month or so.

I look forward to discussing these ideas with you and our colleagues in the near future.

TO: Mandel Foundation colleagues
FROM: Daniel Pekarsky
RE: Tuesday Teleconference

Howard has asked Barry and me to organize our discussion of the Principals Initiative, with attention to the two documents that we have all been sent (the summary of our meeting with Josh Elkin and Sam W.'s reaction to the Principals and JCC initiatives). Below are my thoughts concerning what we should focus on.

1. **The clientele for the Principals Initiative.** Embedded in the summary of the meeting with Josh is the uncomfortableness some of us have been feeling with some of the tentative conclusions we jointly arrived at during our July meetings in Jerusalem. As you will recall, at the time, we decided to cast a wide net: rather than limit ourselves, as we had originally imagined, to individuals who had functioned as educational leaders in general education, we began to think about recruiting talented individuals with potential irrespective of whether they have a background in education. Since then, some of us have continued to be concerned about whether a Mandel program could meaningfully prepare individuals who don't already have a strong background in educational leadership to assume leadership positions in Jewish education.¹ I hope it's possible for us to revisit this question at our meeting.

An advantage of focusing exclusively on those who already have a strong background in educational leadership is that we could focus on the distinctive contribution of a Mandel program without having to worry about whether our graduates would have the nitty-gritty skills and savvy that may be needed to lead a school. A possible disadvantage is that it may be difficult, although Josh Elkin doesn't seem to believe it will be, to recruit a large enough clientele for the narrowly conceived program.

2. **Approach to recruitment.** One approach we have considered is for us to try to identify promising individuals for our program. A second approach is to identify institutions that may be seeking educational leaders and to enter into an agreement with them whereby a condition of hiring a promising applicant that they have identified is that he/she participate in our program. In the best of all worlds, it might be wise to pursue both strategies simultaneously. Given our scarce human resources, it may be desirable to emphasize one strategy over the other.
3. **Identifying a recruiter.** We do not have a designated recruiter for the Principals Initiative. Though a number of individuals (including Dan P., Barry H., Joy R., and Howard) will be involved with the project, it would be best if there were one

¹ Note in this connection that a number of Sam W.'s concerns about the program (his feeling that it is overly ambitious in its aspirations and that it doesn't make provision for its clients to acquire a variety of what he considers to be important tools) are grounded in the assumption that its clients are people with no background in educational leadership.

person who could give sustained attention to this matter. We face two significant challenges:

- a. what kind of person would be best equipped to serve as a recruiter?
- b. How should we divide up the work among the group of us in the absence of finding a recruiter?

4. **Will the program be attractive to potential candidates?** Though he seems confident that there is a potential clientele for a program designed to prepare experienced educational leaders from the world of general education for careers in Jewish educational leadership, Josh Elkin expressed concern about whether the program as presently structured will be attractive to potentially strong candidates. Given the fact that many of these individuals are either beginning or are in the middle of very demanding jobs that may include summer-responsibilities, he was especially concerned about a program that requires three summers. He felt that two would be more attractive, and he thought we should consider incentives/perks. This matter may also be worth revisiting.
5. **Sam W.'s concerns relating to the program conception?** As noted in a footnote to #1, Sam W. is concerned that the program is overly ambitious in what it hopes to accomplish, a concern that seems grounded in the assumption that some of the people we will be recruiting will be **beginning** principals. If we let go of this assumption, at least some of his concerns seem moot. **If**, however, we end up accepting this assumption, then this concern needs to be weighed heavily, as does his belief that a beginning principal needs to acquire habits of mind and heart which are not referred to in our proposal (for example, the knowledge needed to take a stance vis-à-vis such issues as testing, assessment, exceptionality, tracking, grouping, etc.; the capacity to evaluate educational fads; and the possession of what he calls a "vision of the learner").
6. Howard has urged the need to reframe the recruitment-timetable. Time permitting, this may be a matter worthy of our attention on Tuesday.

August 14, 2000

Dear Seymour and Annette,

Sorry has taken me some time to get back to you regarding the documents you gave me during our Palo Alto visit. I've now had a chance to look at both. Doubtless my comments derive as much from my ignorance regarding the context of these initiatives as they do from any of the features you describe in them. Viz. the JCC program, I confess to knowing little of the JCC world and landscape. Consequently, I have less to say about that program.

The Principals' Institute is an ambitious undertaking that speaks to a real need in the Jewish community. Your plan for soliciting candidates for the program strikes me as thoughtful and sound. I imagined for a moment the people in my own community who might be candidates for such a program and how these people might be reached (e.g., retired Microsoft execs or their spouses). In addition to the strategies you mentioned, another thing you might think of is the placement of ads in major newsstand publications, such as Tikkun, Moment, Commentary, the Forward, etc. These ads might reach people who would not ordinarily see themselves as a candidates for a principalship in a Jewish school and the copy could focus exclusively on the notion of career change. The fact that prior involvement in formal educational activities (either Jewish or secular) would not be a requirement for participation could be highlighted.

Regarding the sketch of the program, a few thoughts:

1. As I read the list of aspects that would characterize the "successful graduate," several questions occurred to me. The list struck me as a tall order for someone completing a three-month program, even with intervening activities and meetings between the summers. Indeed, it think we would all be quite happy if the *deeply experienced* principal of a Jewish day school, someone with a dozen years experience, exhibited these qualities.

My question, then, is one of appropriateness of this list for someone just starting out. Framed differently, my question would be: What skills, competencies, ways of thinking would characterize the successful *beginning* principal? Given the limited time frame of the program, what important features of running a Jewish school would *not* be addressed in a program of this duration? What important aspects of Jewish education, school leadership and governance, Hebrew, etc, would have to be taken up once the person is already in the field and engaged in a continuous process of learning?

Rather than a list of competencies, it might be useful to think about the habits of mind and heart that you'd want the prospective principal to bring into the educational world and that could be further honed with experience.

My comments are informed by years of working on our teacher education reform at the University of Washington, where our 12 month program sought to endow each student

go: aft
non-
educators

unrealistic
expectations

Program
-learning
-field
based
learning

habits of
mind &
heart
vs.
competencies

aim at
"beginning
principal"

with every skill and packet of knowledge needed to enter the classroom as an expert teacher. The effort failed because the curriculum turned into a little bit of this and a little bit of that, an undisciplined smorgasbord of offerings that whetted the appetite but did little to develop deep and supple understanding.

As you think about the program, it may be important to view it as part one in a sequence of activities. Part 1 would include the three summers and some kind of "graduation"; part 2 might consist of the first year in the field as principal or educator and some time of virtual community that would network participants in a support group but also in a continuous learning activity. Part 2 might then culminate in a fourth summer, where the cohort would be brought together to cement their bonds and to plan for on-going study group. Part 3 might actually have participants, now fully employed as principals, come back and work with the new inductees. Who knows whether this is feasible. What motivates my comments, however, is the notion that the program, no matter how good as it is, should not be viewed as an end in itself, but part one of an ongoing process.

Consider
a
multi-
phase
program,
extending
beyond the 3 years

2) I very much resonate to the word "vision" and all that it signifies in the document. However, as I asked myself about the world I inhabit, and the multiple visions that inform my work, I thought about the kinds of things that are ***not*** represented.

As a broad rubric, I would refer to this sphere as one of "inquiry." As written, the program leans heavily on an image of the principal deeply rooted in traditional Jewish sources and informed by classic texts in educational philosophy. This is a powerful orientation that will serve someone well, particularly as that person shapes a personal vision of the Jewish school. But there many other important concerns that a principal has to deal with—issues of assessment, testing, the integration of technology, exceptionality, grade retention, grouping, tracking, ADD; not to mention the on-going bombardment of educational fads that proclaim themselves to be "research-validated": multiple intelligences, interdisciplinary curriculum, whole-body response, learning styles, brain-based education . . . and this is just the tip of the iceberg. All one has to do is to open any issue of Educational Leadership to see the bustling marketplace hawking the latest ideas, fads, trends, etc. The question is: what ways of thinking, what habits of mind does the prospective principal need to wend his way through this thicket? What is there in the current vision of PI curriculum that would equip someone to decide if kindergarten retention is the thing to do for a child doing poorly? Or whether within-class reading grouping at the primary level leads ineluctably to a greater ability spread? Or whether the Rasias method, applied to Hebrew teaching, has promise? Where in the curriculum is there a way to develop the habit of mind that would help someone think about questions as mundane as whether to select a phonics-based or whole-language based program for the 1st grade, or whether a teacher who proclaims to use a "constructivist approach" knows what she's talking about?

America is a marketplace of educational ideas, and most of those that sell match the prejudices and sensibilities of the zeitgeist. At the top of the charts right now is Gardner's theory of Multiple Intelligences, which at its kernel has a sound idea (or two) but which in practice has led to silliness and outright educational malpractice. In my own school

Our answer: our person is sophisticated!
already

visits, in both public and private schools, these ideas are accepted uncritically, and sometimes applied in ways that are deleterious to the educational enterprise. When I have questioned educators about their use of these innovations (in fact, up close and personal, my daughter Shoshana's history teacher), I've found that those in charge often have no sense of how to ask questions that probe beneath the claims that appear as snazzy copy on the back of book jackets or curriculum packages.

To call the capacity to ask such questions an "awareness of educational evaluation" diminishes its importance and misrepresents its complexity. Evaluation is often thought of (indeed written about) as a set of procedures that can be plied in order to arrive at decisions about effectiveness. But I am aiming at something much broader and more essential than that. What I am thinking about is a way of examining educational claims, a way of asking questions about educational truth—an orientation, if you will, of putting questions to the world and thinking about how they might be answered. This capacity—which strikes me as so central to the fad-driven American context—was not represented as far as I could tell in your document.

A related thought. In addition to the vision of the educated Jew, there is also a *vision of the learner,* a vision of how that learner comes to develop deep understandings of the world. It is a vision that embodies the theory of learning that we all carry in our minds and hearts. My own has been deeply affected by the cognitive revolution, which has torn asunder notions of learning as retention or the compilation of facts or memory as so many bits of information randomly scattered across neural networks. In addition to the educational thinkers you list, there are powerful texts from Vygotsky, Piaget, Bruner and their colleagues that challenge conventional and taken-for-granted ways of knowing (cf. the National Research Council's How People Learn,

<http://books.nap.edu/books/0309065577/html/index.html>

In my own area of interest—how culture shapes conceptions of the historical self—there are still other classics—not from philosophers but from sociologists and historians (e.g., Halbwachs or Pierre Nora) that challenge the status of school as the principle historicizing force in modern society.

I doubt whether I am expressing this well, but I guess what I am trying to get at is the notion that, concomitant with the vision of an educated Jew, there must also be a vision of the *educated student* of mathematics, of history, of science, and that these visions of what it means to be educated, as a "knower of history" or any other subject, invariably inform our choices of curriculum, textbooks, testing programs, and the very way we conduct of day-to-day classroom life. Without explicit attention to the underlying theories of how we know and how learning proceeds, we are ill-equipped to deal with the cacophony of the American educational marketplace or defend our choices before skeptical parents or board members.

As far as the JCC document goes, I am less acquainted with that world and have less to offer. Some of what occurred to me as I read it, I noted when we spoke in Palo Alto -- there has been a great deal of work on community-based educational organizations that

Way of thinking about, // evaluating edu = fads

vision of the learner.

}?

would not show up in an ERIC search of "informal education." Some of this work has taken up intellectual skills (such as Cole's 5thDimension), other work has looked at the role of inner-city community centers and organizations (Boy's and Girls clubs, Little League and the like) by Health and McLaughlin. In addition, there is an entire body of work, that might be relevant or at least be a source of ideas, on learning in natural settings-often referred to as "Cognition in the Wild." Names that come to mind with this literature are Edward Hutchins, Jean Lave, and Barbara Rogoff.

*Urban
anthro
industrial
anthro*

I offer the next comment with some tentativeness. As I looked at the bullets about curriculum, I thought that those who design JCC programs could also use a working acquaintance with the tradition of urban anthropology or industrial anthropology (e.g., Lucy Suchman's Plans and Situated Action), a tradition that teaches us how to look closely at what people *do* with educational products and packages. These "user studies" provide a way of thinking about on-going program improvement by going into people's homes and watching them interact with our educational materials, then feeding this information back to the designers. It is a way of entering into an ongoing feedback loop between the design process and how people actually use and interpret what we've designed.

*Michael
JCC*

My final thought has to do with the JCC as a fixed place, a building in a particular location that members of the community drive to. This was the JCC of my youth (in Utica New York), and it is the JCC of my adulthood, a well-equipped building in Mercer Island Washington, which is ½ hour drive from my house. In my 11 years in Seattle I have been to the Mercer Island JCC twice. (Nor are we members.) What occurs to me is that the JCC of the future will continue to be a physical site, but it might also be conceived of as a virtual site, a place I can visit from my home sitting at my computer. There is nothing in the composition of this document that takes seriously the role of new technologies in creating state-of-the-art formats of learning that make available extraordinary teachers, carefully crafted courses, and which bridge the divide between communities within North American and between North American and Israel. While some of his ideas are obviously far-fetched, Yossi Belin, in his new book about Dode Sam, offers some creative and forward-thinking ideas about the uses of technology in creating educational access. I would encourage some hard thinking about how the JCC of the future can retain its status as a physical site, but could expand its influence and educational mission by being a communal broker of courses, tutorials, and workshops all available on the net and accessed from the comfort of one's home.

Again, I apologize in advance if I have misread the intention of these documents or imputed to them something that was not intended. Let me know if you have any questions or if I can clarify any of what I've written. I look forward to seeing you soon.

Kol toov,

Sam

SCRIPT FOR CONVERSATIONS WITH LAY LEADERS OF DAY SCHOOLS

Below are the main points that I would emphasize in a conversation with these individuals.

1. I represent the Mandel Foundation, a major foundation which, over the last 15 years, has been deeply involved in the improvement of Jewish education in North America, in Israel, and around the world. It is, for example, the principal funder of the Jerusalem Fellows program, whose graduates are well-represented among the leaders of Jewish education in North America and around the world.
2. As you probably know first-hand, there is a profound need for talented educational leaders for Jewish day schools. Because there are not enough qualified people in the field, institutions have begun to turn to general education to meet their needs of educational leaders. In view of this strong trend, and in the belief that senior personnel coming from general education require additional learning in order to be as effective as they ideally will be, the Mandel Foundation is planning to launch a program designed to prepare general educators for leadership positions in Jewish education.
3. We believe this is a very good population from which to recruit principals for day schools because such individuals bring years of training and experience to the difficult challenges of educational leadership. In addition, as a recent New York Times article suggested, many principals working in general education are, for a variety of reasons, ready for a change, and to many the world of Jewish day schools may be very appealing. It offers them the opportunity to work in a less bureaucratic environment and to focus on aspects of children's development that are out of bounds in public schools (especially moral development and spiritual development). It also provides them with a rich opportunity to express their own identity as Jews.
4. While these individuals are highly skilled and rich with potential, they often have some significant, but remediable, weaknesses which reduce their effectiveness in Jewish educational settings. For them to be fully effective in a Jewish day school setting, their work needs to be generously informed by Jewish perspectives and ideas that most of them are unlikely to have. The Mandel Foundation has years of experience in helping Jewish educators become leaders whose work is meaningfully guided by powerful visions of Jewish life; and the program it is developing is organized around this challenge.
5. **Not part of the general presentation. But if queried re: the character of the program, the following can be said:** The challenging educational program we are designing offers the opportunity to encounter and wrestle with a range of powerful Jewish ideas concerning the nature of Judaism and a meaningful Jewish life, and it gives participants the chance to think through the implications of such ideas for the design of a Jewish day school. Designed to help them develop an

to think systematically about the implications of such ideas for the design of a Jewish day school. It is a rich opportunity to grow as a person, as a Jew, and as a Jewish educator.

8. The program is a Block Program, which brings participants together for two or three three month-long summer sessions, as well as for short seminars during the year.¹ The program will thus not interfere with beginning to function as a Jewish day school principal while still in the program. The program will take place at Harvard and will include one summer session in Jerusalem, and participants will have the benefit of first-rate scholars and teachers in the areas of Jewish Thought and education – individuals whose academic appointments are in major institutions like the Hebrew University, Brandeis University, the Jewish Theological Seminary, and the University of Wisconsin.
9. Participants (or, in the case of participants who are sent by schools, the schools) will pay a tuition-fee to cover some of the program's costs; other program costs will be absorbed by the Mandel Foundation, which is eager to see this program flourish and make a contribution to American Jewish life. The Mandel Foundation will work hard to ensure that every qualified applicant, whatever his or her financial circumstances, will be able to participate in the program.
10. As I said earlier, I'd love your feedback about this program as well as to find out whether you think people like yourself might find it exciting.

¹ .Actually, though we we're pretty clear about some of the program's key ingredients, we're still deliberating about how much time it should take. How do you think principals that you know would react to a three-summer program? To a two summer program?

SCRIPT FOR CONVERSATIONS WITH LAY LEADERS OF DAY SCHOOLS

Below are the main points that I would emphasize in a conversation with these individuals.

1. I represent the Mandel Foundation, a well-endowed foundation which, over the last 15 years, has been deeply involved in the improvement of Jewish education in North America, in Israel, and around the world. It is, for example, the principal funder of the Jerusalem Fellows program, which over the last twenty years, has provided much of the leadership for Jewish education in North America and around the world.

2. As you probably know first-hand, there is a profound need for talented educational leaders for Jewish day schools. Right now, too many institutions like yours are having to go after principals who are woefully under-prepared for their work. Seeing this serious, but unmet, need for principals, the Mandel Foundation is planning to launch a program designed to prepare general educators for leadership positions in Jewish education.

3. We believe this is a very good population from which to recruit principals for day schools because such individuals bring years of training and experience to the difficult challenges of educational leadership. In addition, as a recent New York Times article suggested, many principals working in general education are, for a variety of reasons, ready for a change, and to many the world of Jewish day schools may be very appealing. It offers them the opportunity to work in a less bureaucratic environment and to focus on aspects of children's development that are out of bounds in public schools (especially moral development and spiritual development). It also provides them with a rich opportunity to express their own identity as Jews.

4. While these individuals are rich with potential, they tend to have some significant, but remediable, weaknesses which reduce their effectiveness in Jewish educational settings. For them to be fully effective in a Jewish day school setting, their work needs to be generously informed by Jewish perspectives and ideas that most of them are unlikely to have. In particular, the Mandel Foundation believes that the leaders of Jewish schools will be much more effective if their approach to curriculum, inservice education, and other areas of their work is guided by a powerful vision of an educated Jewish person. The Foundation has years of experience in helping Jewish educators become leaders whose work is meaningfully guided by powerful visions of Jewish life; and the program it is developing is organized around this challenge.

5. The challenging educational program we are designing offers the opportunity to encounter and wrestle with a range of powerful Jewish ideas concerning the nature of Judaism and a meaningful Jewish life, and it gives participants the chance to think through the implications of such ideas for the design of a Jewish day school. Designed to help them develop a deep understanding of themselves

and their aims as Jewish educators, the program is a rich opportunity for them to grow as Jewish educators and as a Jews.

6. The program is a Block Program, which brings participants together for two or three extended summer sessions, as well as for short seminars during the year. The program will thus not interfere with beginning to function as a Jewish day school principal while still in the program. The program will take place at Harvard and Jerusalem, and participants will have the benefit of first-rate scholars and teachers in the areas of education and Judaic – individuals whose academic appointments are in major institutions like the Hebrew University, Brandeis University, the Jewish Theological Seminary, and the University of Wisconsin.
7. Participating institutions that send students to our program will be asked to make some financial contribution to cover some program costs. But because of its deep commitment to the strengthening of Jewish around the world, the Mandel Foundation will underwrite much of the cost of this program, with the result that tuition-costs will not be substantial.
8. We want to encourage you to do two things: a) to seriously consider hiring a principal from out of the world of general education; b) to make it a condition of hiring such a person that he/she will participate in the program we have organized. We are confident that your school will be better off as a result.
9. We would love to get your feedback concerning the program and to speak further with you and/or your Search Committee further concerning our program. For now, and for our own planning purposes, we would like to know if this might be a program that would interest you.

SCRIPT FOR CONVERSATION WITH PROSPECTIVE CANDIDATES

Below are the main points that I would emphasize in a conversation with these individuals.

1. I represent the Mandel Foundation, a very well-endowed foundation which, over the last 15 years, has been deeply involved in the improvement of Jewish education in North America, in Israel, and around the world. It is, for example, the principal funder of the Jerusalem Fellows program, which over the last twenty years has provided much of the leadership for Jewish education in North America and around the world.
2. I would like to tell you about an exciting new program that the Mandel Foundation is now developing. As I describe it to you, I am eager to get your feedback about this program, as well as to find out if you know of individuals who might be interested in and appropriate for it – even perhaps yourself.

3. There is a profound need for principals for Jewish day schools around the country. Exciting, well-paying (typically six figures!) positions in new and existing schools are going unfilled, due to a shortage of appropriate candidates.
4. Seeing this serious but unmet need for principals of Jewish day schools, the Mandel Foundation is planning to launch a program designed to prepare educational leaders from general education for leadership positions in Jewish education.
5. The reason we are launching this particular program is that we believe that Jewish individuals who have served as principals in general education are an excellent constituency from which to draw principals for day schools. On the one hand, we believe that such individuals – individuals like yourself – can make an enormous contribution to Jewish day schools; your years of experience and training would serve you very well in Jewish educational settings. On the other hand, we believe that many talented principals from the world of general education will find work in Jewish day schools enormously rewarding: the salaries are extremely good, typically in the 6 figures; you would not have to contend with the complex bureaucracies that hem in educators in general education; and you would have the opportunity to affect children in important areas that are often off limits in public education (for example, moral and spiritual development). And for some people, becoming a principal of a Jewish day school would be rewarding because it offers participants the chance to express themselves as Jews and to make an enormous contribution to Jewish life.
6. While talented educators like yourself are rich with potential, many tend to have significant, but remediable, weaknesses which hamper their work in Jewish educational settings. For them to be fully effective in a Jewish day school setting, their work needs to be informed by Jewish perspectives that most of them are unlikely to have. In particular, the Mandel Foundation believes that the leaders of Jewish schools will be much more effective if they can bring to their work curriculum, inservice education, and other areas not just a strong Jewish knowledge-base but also, and especially, a powerful vision of an educated Jewish person. The Foundation has years of experience in helping Jewish educators become leaders whose work is meaningfully guided by powerful visions of Jewish life; and the program it is developing is organized around this challenge.
7. The challenging educational program we are designing offers the opportunity to arrive at a vision of Jewish life that can guide their work by encountering and wrestling with a range of powerful Jewish ideas concerning the nature of Judaism and a meaningful Jewish life. It also gives participants the chance to think systematically about the implications of such ideas for the design of a Jewish day School. It is a rich opportunity to grow as a person, as a Jew, and as a Jewish educator.

8. The program is a Block Program, which brings participants together for three month-long summer sessions, as well as for short seminars during the year.¹ The program will thus not interfere with beginning to function as a Jewish day school principal while still in the program. The program will take place at Harvard and Jerusalem, and participants will have the benefit of first-rate scholars and teachers in the areas of Jewish Thought and education – individuals whose academic appointments are in major institutions like the Hebrew University, Brandeis University, the Jewish Theological Seminary, and the University of Wisconsin.

9. Because of its deep commitment to the strengthening of Jewish around the world, The Mandel Foundation will underwrite much of the cost of this program, with the result that tuition-costs will not be substantial. In some case, if the participant hires on to a Jewish day school, it may well be that the school will assume responsibility for some, if not all, of these financial expenses.

10. As I said earlier, I'd love your feedback about this program as well as to find out whether you think people like yourself might find it exciting.

¹ .Actually, though we we're pretty clear about some of the program's key ingredients, we're still deliberating about how much time it should take. How do you think principals that you know would react to a three-summer program? To a two summer program?

TO: Principals Initiative colleagues
FROM: DP
RE: Conversation with Bob Abramson

INTRODUCTORY

I had a long conversation with Bob Abramson this. I explained to him the kind of initiative which the Mandel Foundation was contemplating and asked him for the names of institutions that were currently searching or that had recently hired a director from general education.

Bob expressed ambivalence about the program itself. He's very troubled by the idea of hiring someone to run a Jewish school who is not steeped in Judaica and in the field of Jewish education. In his opinion, such weaknesses cannot be easily remedied in a meaningful way. But though he views the turn to general educators as from optimal, he recognizes that it's a trend and agrees that it's important to try help individuals who come out of general education develop a Jewish dimension that will inform their work. With the qualification that he regards this approach to solving the personnel crisis as far from ideal, he was supportive of the kind of program we are contemplating.

In the course of talking, he also described to me the kind of program that he has been involved in creating, a program that is concerned with the same personnel crisis. The idea is this: graduates of the Seminary's rabbinical program who have an interest in becoming day school leaders will do a residency of two to three years in a day school, during which period they will be nicely compensated through fellowship support. The residency program is designed to allow them to acquire many of the skills that they will need to serve as principals, but they will also undergo more formal learning experiences designed to build their skills. Bob expects that at any given time there will be about three individuals in this program, with one graduating every year.

LEADS AND OTHER PEOPLE OF INTEREST

Not a lot that we don't already know surfaced from this conversation, though Bob was very forthcoming with what he does know.

1. Charles E. Smith and Solomon Schechter of Newton are both searching.
2. He mentioned Carl Mandel (in Hartford) as an example of a thoughtful, serious person who had made the move into Jewish education.
3. Beit Shraga has co-directors: a Judaica person (Howie Rosenblatt) and a co-head who is from general education (Hollis Palmer). Technically, Rosenblatt is the director.
4. In the Schechter School in Providence, Rhode Island, a principal left and was replaced by Dr. Penny Stein, an educator who had worked for the school whose principal background is in general education. The co-chairs of this school are Deborah Schuster and Leah Hersh.

5. Pittsburgh' principal, Frank Smizik, is a very competent general educator, and he has a very weak Judaica background. *Need to point to his lay person*
6. In Houston, one of the large congregations, Beth Yeshurun, has a Day School and a Congregational School. The day school has a principal who comes from general education, as well as a Head of Jewish Studies. The Congregational Hebrew School has its own director. This institution is looking for a leader who will oversee both enterprises – a kind of czar of education. *point to lay leader*
7. Bob pointed to Cheryl Finkel of Atlanta as a wonderful example of someone who moved from general to Jewish education in a very meaningful way. She is, to his mind, a counter-example to his general thesis that this is a dangerous route.
8. In Bocoraton, there is a PEJE school.....ASK JOSH Barbara Winston, Chair of lay committee, 561-241-3842
9. In Jacksonville, Florida, a non-Jew, Willard Kennedy, has proved as good as anyone at articulating the school's Jewish mission. Also a great counter-example!

תורים אלו מלמדי
תועקות באמונה
תורים אלו התועקות

Teachers and school children —
precious jewels of our community
הורשח הורשח, שונוג או שונוג

TO:
DAN
PEKARSKY
8/1/00

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FAX TRANSMISSION

TO: *Howard Charist*
FAX: *212-532-2646*

PHONE:

RE:

From: *Joshua Elkin*

Date: *8/1*

Pages: *2 + cover*

cc:

Comments:



Teachers and school children —
precious jewels of our community
MIDASH RABBIAN, SONG OF SONGS

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To: Howard Charish
From: Josh Elkin
Date: August 1, 2000

I have given considerable thought to your request about a recruiter for the day school principal's initiative. The following ideas are the ones that surfaced so far:

Private school links

1. I think that a conversation with Pearl Kane at the Klingenstein Center Teachers College should yield some help in getting into that network. I also think that Richard Barbieri who is an established independent school consultant could also be very helpful. He lives up this way and has done a number of things in the independent school world and most recently has done some consulting to Jewish schools. He probably would also be a good contact for names and possible leads on a recruiter.

Public school contacts

1. Speak to Larry Friedman, the Head of the David Posnick Academy in Fort Lauderdale. Larry was a superintendent, retired, and then took on the school. He is probably well connected in the superintendent network and might be very

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Rabbi Joshua Elkin, Ed.D., Executive Director • Dr. Naava Frank, Senior Project Director
Linda M. Simansky, MSW, Program Officer • Dr. Bonnie Hausman, Program Officer

interested in helping to find a recruiter to be able to find more people like himself.

2. A Great Neck South principal, Bernard Kaplan, has been involved in some work with the Solomon Schechter Day School of Nassau County. He might be a good lead for finding a recruiter.
3. The headhunter who found Larry Achateiul in San Diego might also be a good resource for finding a recruiter.
4. Find a contact with one of the early retirees in the New York City public school system and use that person as a link to other potential people who could be considered as the recruiter.

General Recommendations

1. A retired professor of education who has over the years established tremendous relationships with public and private school administrators. Such a person might his or herself be the recruiter.
2. A conversation with Eran Gasko, the human resource development person at Hillel, might yield some ideas.
3. Susan Schur has done human resource development at Federation and has been involved in recruiting people to positions.

Some of the suggestions that I have made might actually yield the actual recruiter his or herself, but in most cases I think the people on these pages would be people who could advise in the process and help to generate a good list of candidates. I think it may be unlikely to find one individual who spans public and private. In that sense I think it may be necessary to think about two recruiters, not necessarily both full time, who could cover the bases.

MEMO

MANDEL FOUNDATION

July 20, 2000

To: Howard, Danny P.
From: Barry
Re: Next steps for Principals Program

Based on a conversation between Barry and Danny P. this morning, here are proposed next steps for work on the Principals Programs. **Please note: we do not yet have the minutes from our seminar discussions in Israel. These are very important materials for us to receive.**

1. Finding and recruiting the program director ("Joy 2")—*Howard*
2. Approval of PT-- *Howard*
3. Followup with Seymour re Harvard site for Program—*Howard*
4. Begin¹ development of recruitment plan—*Danny and Barry*
 - a. Meet with Josh Elkin to discuss his role and knowledge
 - b. Input from Danny Gordis, others
5. Begin development of admissions procedure—*Danny and Barry*
 - a. Define the process and timing
 - b. Composition of admissions team
 - c. Criteria
 - d. Forms and necessary documents
 - e. Recommendations procedure
6. Strategy for learning about other existing Jewish principals programs—*Danny and Barry*
 - a. Check Leah's data from our planning process
 - b. *Danny* talks to JTS
 - c. *Barry* talks to Sara Lee
 - d. Programs in Israel for principals—Melton, Mandel IDP?—*Bethamie?*
 - e. *Bethamie* develops other scans?
7. Begin developing PR plan—*Danny and Barry*
 - a. Determining aims, audience, vehicles
 - b. Begin developing explanatory materials
8. Preliminary inquires about faculty—*Danny and Barry*

¹ We use "begin" in order to indicate that the Program Director will ultimately have a great deal of input and responsibility for these particular activities.

MEMO**MANDEL FOUNDATION****July 19, 2000****To: Howard, Danny****From: Barry****Re: The Planning Team for day school project: Who, What, When**

The proposal for the day school principals project suggested creating a planning team (PT) for the project whose mission would be to plan and oversee the main activities of the initiative, in particular the program/curriculum. The PT would have some connection to all aspects of the project (such as site, PR, etc.) but its main focus would be on content and faculty.

1. What and When

The timeline's middle column essentially outlines the program content planning activities, indicating the role of the PT. I have reproduced that section below, with check marks for what we have accomplished up to date. The work of the PT seems pretty self-explanatory based on the timeline—program and faculty selection/orientation would be its main foci:

**Day School Principals
Program Development Timeline**

June, 2000

- Focus groups—New York and LA
- Develop first iteration of Program

July, 2000

- Appoint program director; appoint program assistant
- Israel seminar discussions
- Explore current programs in Jewish principal training
- Develop second iteration of Program

August

- Develop second iteration of Program (cont.)
- Choose planning team ("PT")

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September

- PT meets for 2 days to discuss and critique second iteration of Program

October

- Develop third iteration of Program based on PT feedback
- Faculty identified and recruited

November

- PT meets again to discuss third iteration
- Fine tune Program based on PT discussions
- Faculty identified and recruited (cont.)

December

- Fine tune Program based on PT discussions (cont.)
- Faculty identified and recruited (cont.)

January, 2001

- Israel meeting: to discuss and critique Program, report on recruitment situation, etc.
- PT meets again to discuss results of Israel meeting re Program
- Development of evaluation plan
- Tutors recruited
- Individualized conversations with faculty in advance of February meeting
- Faculty identified and recruited (cont.)

February

- Tutors recruited (cont.)
- Meeting of entire faculty plus tutors (in Israel?)

March

- PT meets again to discuss results of faculty meeting and adjust Program

April

- Staff refines final version of Program

May

- Creation/xeroxing of materials

[July 19, 2003]

June

- PT meets again

July**▪ PROGRAM LAUNCH****2. Who should be on the PT?**

I propose a team of 5-6 people:

1. Barry Holtz (team leader)—for Jewish education and Jewish content.
2. Dan Pekarsky—for philosophy of Jewish and general education (a main focus of the program).
3. Josh Elkin—ex officio, as it were. As the originator of the program idea, as a very well-connected educator and as a former successful day school principal, Josh would have much to contribute to this work. It also helps forge a link with PEJE, if the Mandel Foundation views that as desirable.
4. Ellen Goldring—Ellen's expertise in the field of educational leadership as it generally defined in American general education will be important for our deliberations. It is true that the Mandel School has a different approach to educational leadership development, but it will be important to have someone who can "keep us honest" about educational leadership issues as they are generally laid out in contemporary American educational thinking and who can help us think through the specific questions that may arise, especially if the program includes participants (unlike those in Bethamie's focus groups) who do not have much previous experience as school principals.
5. The Program director—we have developed a list of both senior (Mark Smiley types) and younger (Penina Grossberg types) potential candidates for this position, essentially parallel to Joy on the JCCA project. This person should ideally have day school experience. He or she would be responsible for "holding the entire project together." (The model for this has been Gail at TEI). That includes all the logistics, contacts with participants and site, PR, etc. Obviously it also includes being directly connected with the program content. The more senior the person, the more responsibility for program that person will have.
6. Ideally we would also have a Judaica content expert on board. This would be important if the program needs to develop a strong Judaica learning component—such as we had envisioned for the general education day school principals coming into the field. It may be that we should plan to add this person at a later date—after we have a better sense of what, if anything, will be the Judaica side of the curriculum. This person could serve as a faculty member of the program as well.

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Memorandum

To: Howard Charish, Dan Pekarsky, Barry Holtz

From: Bethamie Horowitz

Date: July 13, 2000 (*revised*)

Re: Focus Groups with Principals

This report is based on meetings with six people who made the shift from senior positions in the public schools (principal or higher) to working in Jewish day schools.

On June 14th in NY Barry Holtz, Josh Elkind and I met with Karl Mandel (Hartford Schechter School);

On June 22nd in LA I met with Larry Acheatel, Jeff Davis (both of San Diego Jewish Academy – Larry is superintendent, Jeff is principal of the high school), Rennie Wrubel (Millken High), Nadine Breuer (Wilshire Elementary), and Liz Michael (Yavneh Los Gatos -- elementary).

The purpose of the focus groups was to:

1. learn about the experience of moving from public schools to private Jewish day schools from the vantage point of these individuals
2. identify to key differences between the public versus Jewish Day school arenas as seen by these senior professional leaders.
3. Identify “knowledge gaps” – areas of perceived need -- in moving from the public sector to the Jewish day school--- *as seen by the participants*.
4. Hear participants’ reactions to a Mandel Principals’ Initiative.

Three main topics were addressed in the focus group.

First, participants’ views of the differences between the public school and the Jewish day school, and the issues involved in making the shift from one context to the other.

Second, the participants’ views of themselves – their professional identity: the relationship between being an educator and working in the Jewish day school/Jewish

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community.

Finally, the participants' sense of what sort of training program would make sense for people like themselves—"the Mandel Principals' Initiative."

[A copy of the focus group protocol (used in LA) will be attached to the end of this report. In addition, participants completed a short questionnaire at the end of the meeting.]

How they were recruited:

Not one of these people was actively seeking to make a change, it seems. Two of the six were approached by known search firms (who knew them from public education searches) They would never have considered moving, and at first did not seem at all interested. Each was seriously wooed by school search committee and key players (including funders).

Three heard were known to the search committee through prior involvement with the school/temple/rabbi. These people won out the competition. But they, too were not planning to make a move.

Comparing Settings: Public versus Jewish day school

Why leave? Frustrations with the Public system

Four of the six participants were particularly vocal about the frustrating aspects of working in public education (All four were California veterans – the other two worked on the east coast before, making the move to Jewish schooling). They spoke about the California State Educational Code – the myriad regulations developed by legislators (who know little about schools)-- testing, the very strong and entrenched teachers' union (and its regulations). All in all, they summed up the negatives of working in public education as the "difficulty in thinking out of the box."

The upshot of this shared frustration was what one participant called the "ongoing conversation in the teachers' lounge – "what if we could start our own school." This conjures up an image of enthusiastic and creative teachers who are dying to get out from under the mass of bureaucratic detail that locks them in place. [NB: These participants have been working in public education from 22-36 years!] So there were "pushes" motivating at least some of the participants to make the move.

Attractions of the Jewish day school

- * Being able to create your own school
- * One of the primary attractions of working in a Jewish school for most of the participants was the sense of the school's moral underpinnings – a sense of the vision of the school linked

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to a more profound framework. As one participant (an elementary school principal) said – in the public system you spend a lot of time keeping God out of the school. If a child became involved in drugs or cheating, the most you could ask was , “Do you know the difference between right and wrong?” But in a Jewish school you don’t need to “stop short” in this conversation. You can speak about “how we treat each other.” (i.e. creating a community?)

This moral /values-related aspect arose when participants spoke about their sense of themselves working in the Jewish world. A number of them prefaced their remarks by saying, “I have always been against vouchers, but...” Many saw themselves as having entered the field of education as a means of making the world a better place, helping kids who really needed help.

In this context these educators have had to explain to themselves why a Jewish private school, typically serving a rather well-to-do community, is a good place for them to be working. Their answers were quite interesting: they view the Jewish school as being the place to address the Jewish community’s sense of entitlement (arising from it’s wealth).

Kids say they get something because “I deserve it.” “My job as an educator is to show them that that’s not true. These are a bunch of rich kids. But these kids will be leaders in numerous fields. By being in the Jewish school I can help shape them a bit—in their values.”

* A couple of participants liked the idea of working in a Jewish setting because they viewed this as a means of integrating better the human and the spiritual. “I wasn’t unhappy with the public school, but I felt there was more that would nourish me [in the Jewish day school].”

* As in any private school, it’s easier to implement a new idea quickly. You can also “set your own graduation date.” Participants appreciate the lack of bureaucracy (but they don’t like the flipside --the unprofessionalism of the Jewish schools).

Pluses of the Public system

Although the bureaucracy has its problems, it also has is benefits:

- * Well-developed organization: lots of central office resources, like professional development opportunities, teaching materials.
- * Great retirement (pension) plan (at least after 22-36 years!). Most felt this was the biggest thing they had had to give up – although a couple spoke about getting the Jewish school to make this part of the compensation negotiation. Two participants spoke adamantly, “No one should have to give that up to work in the Jewish day school.”

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* The Principals benefit from existence of separate departments (at the district/state level?) for various functions: personnel (interviewing, recruitment); business (ordering supplies, payroll) (– In public system the principal’s budget is limited to curriculum, supplies, etc. –and does not include teachers’ salaries) .

Challenges in the Jewish day schools:

* Moving into Jewish schools requires wearing more hats than most of these folks have donned before (exceptions—Karl Mandel and Larry Acheatel, both of whom had broader, system level responsibilities over the course of their careers). For instance, aside from board recruitment and development (which public school principals don’t deal with, although superintendent has to deal with board relations), the principals in the Jewish day school have more financial and budgetary responsibility (or at least interface): they need to be involve in fundraising, in thinking about the school’s endowment, negotiating teachers’ salaries (here they almost missed the union pay scales – but not quite).

* One participant spoke about the day school as a “mom and pop” operation – with the principal wearing too many hats. All of them are working to professionalize the systems they’re in and in some cases their jobs. Thus, for example, at least one of the principals has hired a business manager. Others have created more administrative staff roles (deans of students, of curriculum). But many of them have had to “walk into bathrooms with a plunger” (literally!).

* Later in the LA discussion one participant made the comment that the boards of Jewish schools don’t realize that “we need much more sophistication in every domain. The (tuition) dollars aren’t paying for a top-notch school. We need to upgrade expectations, standards and quality” of the school.

So the principals recognize that the operational baselines are different in the public and Jewish day school settings. The public school educators view the Jewish schools as unprofessional. In contrast, Josh Elkin spoke about the need to convey to people a sense of what life is like inside a Jewish school -- the “behavioral and organizational regularities of the normative Jewish day school.”

- Re: educational vision: These educators view this as something they already do and think about. The uniquely Jewish piece seems to elude them, I believe, although they also understand that it is a challenge to integrate the Jewish and the general into a cohesive vision. Rennie Wrubel of the Millken school described a study process for the top school administrators that was initiated by the school rabbi after some students were “exited” (translation: “expelled”) for using drugs and alcohol at a school function (They studied Jewish sources and educational philosophy about *tshuvah*). All participants spoke about articulating and developing a vision of the school, and getting the teachers on board around this. Only a few of them realized in advance how important it would be to work

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with the board around this vision -- this was something they wish they had known in advance of making the move.

They do seem to understand that the process of developing a cohesive vision of the school is a central part of their work. Their sense of the Jewish part of this does not appear to be very sophisticated, although they make no bones about their sense of themselves as Jewishly ignorant (at least in comparison with Jewish educators). Nearly all of them expressed a desire to engage in Jewish study resulting from their new professional involvement in their schools. None of them feel they have the time to devote to this even in a very nominal way. And none of them feel that a "course in Jewish studies" would make them into Jewish educators.

They see themselves as quite skilled in administration, in community process – working through issues with staff, students, parents. Even though they haven't dealt with the specifically Jewish situations that arise, they feel themselves to be highly skilled and able to handle a full range of problems. They know when to call on Judaic expertise from rabbinical figures on their staffs. But they feel that others (unclear who) don't necessarily expect this of them (in advance). Usually the rabbi's authority is what is expected. Yet these educators say they have succeeded in considering big issues that affect the school community.

Professional Identity

These professionals view themselves as different from "Jewish educators." They see themselves as educators working in Jewish schools. In general they do not particularly admire the Jewish educators they've encountered. They view them as unprofessional, and not "cutting edge" in terms of their awareness of advances in the field of education. Not surprisingly, they don't view the conferences (such as CAJE) as particularly useful. At the same time they all expressed a great sense of isolation in their new jobs and a need for serious networking.

These folks LOVED meeting one another. They were excited to meet colleagues they admired, and at breaks began comparing notes and exchanging numbers.

The Mandel Principals' Initiative

The California focus group participants felt that idea of a month long summer meeting of a Mandel program for principals involved a highly unrealistic time commitment. One participant said that he felt that he could devote "one day at the beginning and one day at the end of the year" to such a program, given the severe time demands of his job.

I believe that the group felt a general reluctance to devote much time to a program that appears to be of limited value. This may be related to the limited way in which I described the proposed initiative (with its emphasis on Jewish vision, which is not easily comprehended, but requires would require a lengthy explanation tailored to

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this audience).

These were the initial reactions to the idea of a principals' program. But I asked them to tell me about what they *would want to do* by way of professional development. They got excited when they started to imagine what they would want to do. A number of people described what sorts of formats would work -- elite, program with lots of cachet. The following were mentioned as interesting worthwhile endeavors.

1. Christian Johnson Foundation runs a week long program:

- * participants are nominated by other educators (perceived excellence, community of peers)
- * 1 week at a great resort
- * study each morning (philosophy)
- * free afternoons
- * fine dining and entertainment
- * yearly reunion
- * having dialogue, discussion what's going on in the schools, forming relationships

2. USC runs a seminar for 40 educational leaders where they meet with top leaders in other sectors – government, business/industry. Small group meetings, over several days.

3. Harvard Principals Program

The possibility of meeting in Israel was seen as a draw for this group. (A quick show of hands revealed that all or nearly all had visited Israel at some point in their lives.)

In contrast, although “networking” was seen as a much needed aspect of their new work settings, the participants feel separate from the cohort of “Jewish educators” that goes to CAJE, and a number of the other networks. They view PEJE favorably, AviChai as an org that does things its own way. They were VERY appreciative of Mandel effort to hear their views IN ADVANCE of designing a program. (In contrast, AviChai's Pardes-Hebrew U defines a problem – lack of Judaic teachers, but doesn't give them experience in American Jewish schools.)

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NOTE: Since the LA focus group I have had a modest email correspondence with the participants. They are eager to hear more about the work of Mandel Foundation in this regard. They are already positively predisposed to the foundation as a result of the research process.

Focus Group Protocol (June 22, 2000)

I. Introduction

- A. Personal Intro (BH)*
- B. Overview of the Mandel and purpose of the meeting*
- C. Logistics/ Housekeeping:*
 - format for the group discussion—*
 - length of time, breaks, lunch*
 - taping, write-up of report. Anonymity (non-attributed comments, if preferred).*
 - No broader distribution of the report.*
 - Payment*
 - Location of bathrooms, phone,*
 - transportation arrangements*

D. Introduction of Participants

II. Comparing Settings: Public versus Jewish Private

A. All of you have made the move from public sector to Jewish education. I'd like to hear about your own experiences.

What are the similarities and differences between your prior work in education and your current work in a Jewish day school setting?

How big a shift has this been for you? What have been the continuities and discontinuities?

What were your expectations about? How do you see things now?

Looking at "shift" from prior work to current Jewish school:

How did you come to make this transition?

Why did you do it? What motivated you to switch?

B. Compare and contrast the public school and Jewish school environments:

Key differences for a professional moving from public school to Jewish private school. (e.g. private

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school and tuition leads to expectations of quality?)

Probe: generate key areas of difference: e.g. fundraising; mom & pop administration versus more professionalized one; etc

Probe for Jewish vision – values – building a community among families;

C. Perceived Needs to bridge the gap

What expertise do you bring to your work?

In what areas do you look to others for expertise?

What knowledge and skills did you feel you needed to have that you did not already possess?

What knowledge or skills could you have used (or might you still need) to help you do a good job?

III. Professional Identity

How do you see yourself?

Are you an educator working in a Jewish school?

Are you a Jewish educator?

How, if at all, has your job in a Jewish School related to your own personal involvement/interest in Jewish life?

How, if at all, has your job in a Jewish School related to your own professional development?

IV. The New Mandel Initiative

Advice from Participants:

B. Program Content—

What advice would you offer for the content of such a program?

- “Judaica” (Jewish content) orientation in such a program?
- “educational vision” orientation (i.e. philosophically oriented study of different conceptions of educational vision) in such a program?
- “learning about the Jewish community and its organizational structures” orientation in such a program?

C. Scheduling, timing and duration

What advice would you offer about issues of:

- Program duration
- Time commitment –
 - summer, during the year
 - Being in Israel

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C. Recruitment

1. How did you hear about employment opportunities in the Jewish world?
2. Do you have suggestions about how to identify potential participants, and how to inform them about the Mandel program?
3. Would you themselves be interested in attending such a program?

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Questionnaire for Focus Group Participants (June 22, 2000)

1. Name _____
2. Age _____
3. Do you have any children living at home? No__ Yes__ (ages)

Current Employment:

4. Name of School	Location	# grades	# Students
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5. When did you begin your employment at the school? _____

6. Did you have any involvement with the school prior to taking a job there?

No__ Yes__ (Describe):

General Education

7. Professional Training/preparation:

Institution	Degree	Year
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a) _____

b) _____

c) _____

8. Work Experience:

Institution	Job Title/description	years
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a) _____

b) _____

c) _____

Jewish Education

9. Briefly describe your Jewish education and background:

Schooling

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Jewish Involvement

**THE PRINCIPALS INITIATIVE
EXECUTIVE SUMMARY
JULY 2000**

This initiative responds to the serious shortage of individuals qualified to assume day school leadership positions. The positions include: head of school, assistant head or division of a day school; curriculum specialist; director of professional development.

Needs/problems. The educational potential associated with the dramatic growth of Jewish day schools in recent years will not be realized unless those occupying leadership positions in these schools are talented and well prepared for their work. Unfortunately, many who currently occupy these positions are inadequately prepared; and many schools, both new and old, that are seeking to hire educational leaders find it very difficult to identify qualified individuals. Although some new leadership-preparation initiatives have recently been launched, they are, in respect of quantity and intellectual orientation, inadequate to the need; nor do they emphasize, as ours does, on bringing "new blood" into the field from outside of Jewish education. The Mandel Foundation's Principals Initiative is a response to this serious problem.

Clientele/admissions criteria. This program is aimed at Jewish individuals whose profile suggests the potential to become effective day school leaders. We are targeting individuals who have functioned as successful leaders in general education, as well as senior teachers, principals of congregational schools, individuals with advanced degrees in Jewish studies, rabbis, and talented professionals from other arenas who have the requisite interests and talents. We are looking for candidates with the capacity to be visionary leaders who have the capacity and desire to participate in an intellectually challenging program that focuses on the relationship between ideas and practice and that asks participants to work towards a powerful vision of Jewish life and education that will guide their professional efforts. The pluralistic learning community we hope to create will be made up of intellectually open men and women who possess diverse views on the challenges and desiderata of Jewish life and education, and who welcome the chance to grow through rigorous study and dialogue concerning these matters.

Aims and curriculum. Graduates of our program will possess a thoughtfully held, articulated vision, grounded in Jewish content, of the ideal outcomes of a Jewish education, accompanied by the ability to nurture vision-driven practice under real-world conditions. The program will include:

- encounters with powerful visions of Jewish life, as well as with the ideas perspectives of significant educational thinkers.
- experimentation with the use of vision as a tool in curriculum development, professional development, budgeting, and other challenges of educational leadership

- immersion experiences in living Jewish institutions, with the challenge of identifying their organizing principles and challenges, as well as formulating recommendations for improvement
- opportunities to develop an in-depth understanding of the predicament and aspirations of American Jewry
- examination of the opportunities and impediments that a vision-sensitive educational leader will encounter in the context of a day school that is embedded in the complex ecology of Jewish communal life
- study of Jewish texts
- individualized programs of study through which weaknesses are remedied and areas of specialization are developed.

Format/site. This Summer Block Program will include month-long sessions in each of three successive summers. Two of these sessions will be held on the campus of a major university situated in a large metropolitan community like Boston. The other summer session will take place in Jerusalem and will be organized in collaboration with the Jerusalem staff of the Mandel Foundation. In between summers, the participants will gather a number of times for periods of up to one week to continue and deepen their work together. In between gatherings, they will pursue individualized programs of study under the direction of the faculty, and they will continue their ongoing conversation by means of Internet technologies.

Faculty/staff. In addition to faculty, the program staff will include a full-time program director who oversees and coordinates all aspects of the program and a full-time administrative assistant.

Recruitment/marketing/communications. Recruiting an appropriate clientele for this program is a very significant challenge that needs to be approached with the utmost seriousness. Josh Elkin of the Partnership for Excellence in Jewish Education should be encouraged to become a serious partner to the Mandel Foundation in the development and implementation of a comprehensive recruitment plan. Projected recruitment efforts will have several foci:

- making contact with schools that are seeking to fill leadership positions and working out agreements whereby employment is contingent on participation in our program of study
- using various networks, publication outlets, and mailing lists to identify potential candidates who are currently working in general education, Jewish Studies and other varied arenas

- conferences for lay leaders of day schools and for Jewish educational leaders working in general education designed to highlight the needs and opportunities in the field and the Mandel Foundation's programmatic response.

The Mandel Foundation's relationship to its graduates. In addition to helping graduates find suitable positions, the program will offer them structured opportunities to continue their professional growth – for example, through annual retreats. It will also create the scaffolding that will enable graduates to function as a network that offers its members support and advice. It may also pair graduates with more experienced educational leaders who can serve them as mentors.

Budget. See Mindy Hepner's analysis for a discussion of the costs of the program. Students will be provided with a tuition-free education and with a stipend to cover costs of participation. Though the Mandel Foundation should bear most of the cost of the program in its initial stages, organizations like PEJE and day schools that directly benefit from the program should contribute financial resources to its maintenance.

Feasibility. In view of the critical need for educational leaders in Jewish day schools, this seems like a program with the potential to make a significant contribution to American Jewish life, and we think it possible to actualize it at a high level of quality within a year. The most difficult challenge we face is that of recruiting a suitable clientele in a timely way. We are aiming to recruit a group of 20 individuals and launching the program in July, 2001.

THE PRINCIPALS INITIATIVE¹⁶³⁸³

June, 2000

INTRODUCTION

The Principals Initiative flows directly out of the Mandel Foundation's mission of educating a cadre of talented, wise, and visionary leaders to serve the Jewish community. At a time of acute need, this initiative aims to prepare appropriate individuals for leadership positions in Jewish day schools in North America. The positions include: head of school, assistant head or division of a day school; Jewish day school curriculum specialist; and director of professional development within a day school. While the particular initiative described below is targeted at recruiting and preparing individuals who do not currently serve as day school leaders, this initiative has the potential to serve as the foundation for a more comprehensive Mandel Foundation plan designed to improve the quality of day school leadership in North America.

1. Needs/problems

Whereas day schools have long been a feature of the Orthodox world, the last 25 years have witnessed dramatic growth in non-Orthodox Jewish day schools. Today, there are approximately 670 Jewish day schools in the United States (a figure that does not include the day schools in Canada). Of these 75 are community schools, 20 are affiliated with the Reform movement, 63 are Solomon Schechter Schools, 92 are Modern Orthodox, and 80 are Centrist Orthodox. The expansion of the day school movement is an exciting development, for these schools may prove capable of substantially improving the outcomes of Jewish education in North America.

But for this potential to be realized it is essential that day schools be directed by qualified educational leaders who are both talented and appropriately educated. While there are such individuals in the field, unfortunately there are far too few of them to adequately fill the many positions as day school leaders. Many positions are being filled by under-qualified individuals and new positions are extremely difficult to adequately fill. Reports from the Partnership for Excellence in Jewish Education, from JESNA, and from those intimately familiar with the Reform, Conservative, and Community day school movements all converge on this point. As Joshua Elkin, of PEJE recently put it, "The crying need for day school leaders faces us everywhere we turn....Some of the largest day schools in the country have found that the available pool of individuals to be considered for such positions is dangerously small. There are simply not enough individuals currently in the field of Jewish education leadership to respond to the rapidly expanding Jewish day school world. There are more elementary and middle schools opening up and with the burgeoning Jewish high school field, coupled with the growing size of many of the schools, the Jewish educational world is not keeping pace with the demand for these positions." It is pertinent to add, according to Paul Flexner of JESNA, there were this spring approximately 27 educational leadership openings (as either Principal or as Head of Jewish Studies) outside the Orthodox world.

While new efforts to prepare educational leaders are being launched,¹⁶³⁸⁴ Elkin, whose work is focused on this problem, is convinced that there are insufficient training opportunities to meet the demand for qualified day school leaders." Nor do we have the confidence that the training opportunities that are or might be made available by other institutions will address what the Mandel Foundation believes to be the critical educational needs of those who would embark on careers as leaders of Jewish schools. Prominent among these is the need to develop a thoughtful, articulated, compelling guiding vision, grounded in Jewish content, that addresses the why's and wherefore's of Jewish education.

2. Clientele/admissions criteria

Target-population. Designed to bring new people into positions of day school leadership, this program is aimed at individuals whose profile suggests the potential to become effective educational leaders of day schools in North America. Prominent among the groups which are targeted by the program are Jewish individuals who have functioned as successful leaders in general education in North America and who are attracted by the idea of making a career-move into Jewish education. This clientele includes individuals who have functioned as superintendents or assistant superintendents of school districts, public school principals, private school principals,

department heads, assistant heads, and some veteran teachers who have assumed leadership roles within their school settings.

This particular population is an obvious group to turn to meet the leadership crisis in Jewish day school education. They are already a highly trained group, and the field of day school education could realize a very quick and focused return on its investment. In reality, the day school world has already been turning to public/private school leaders from general education to fill their slots because of an inability to identify qualified and available Jewish educational leaders to assume these roles. Through the grant work of the Partnership for Excellence in Jewish Education and through travel around the country, the professional staff of PEJE have already uncovered between fifteen and twenty such individuals who have already made the shift into the field and who are presently in leadership positions within day school. Based on its inquiries, PEJE believes that there are within this group other individuals who would be interested in a high quality training program that would equip them to function effectively in Jewish educational settings.

In addition to targeting individuals currently working in general educational settings, this program is interested in identifying others whose profile suggests the potential for day school leadership. Such individuals may be drawn from the ranks of veteran teachers in Jewish day schools, principals of congregational schools, individuals with advanced degrees in Jewish Studies, rabbis, and professionals in other fields who are seeking a career-change into Jewish education. The program might also be appropriate for individuals who have recently moved into positions as day school leaders.

Admissions criteria. Appropriate candidates should possess the following characteristics:

- a) track-record of success in his/her chosen field.
- b) the desire to make a contribution to Jewish life by assuming a leadership position in Jewish education.
- c) general characteristics required for leading an educational institution (for example, interpersonal presence and savvy; energy and initiative), as well as indications of the potential to become a vision-guided educational leader who can work effectively with teachers, parents, boards, children, and the larger community.
- d) habits of mind and heart required to grow professionally through a demanding program that involves serious text-based learning and disciplined conversation, as well as struggling with, developing a personal stance towards, and working through the educational implications of powerful ideas concerning the nature and aims of Jewish education. These habits of mind and heart include: intellectual curiosity, openness to new ideas and to re-thinking old ones, intelligence, an analytic mind, thoughtfulness, imagination, and integrity.
- e) the ability to thrive in a pluralistic learning community made up strong, talented, and thoughtful individuals.

More generally, we are looking to attract individuals with the capacity to be visionary leaders rather than managers; who are not know-it-alls looking for a quick-fix credential, but, rather, have the capacity and the desire to participate in an intellectually challenging program that is interested in the relationship between ideas and practice. While appropriate candidates should be individuals who find participation in Jewish life important beyond the world of their professional work, we are not assuming that they bring with them extensive Jewish knowledge or facility with Hebrew.

While the foregoing speaks to the characteristics of individual applicants, the admissions process needs to consider the composition of the overall group of students. We aim to put together a group of men and women who bring with them varied backgrounds and talents, as well as a range of perspectives on the challenges and desiderata of Jewish life.

3. Aims/outcomes of the program

The program is guided by a conception of a Jewish educational leader that has, at its heart, the idea of vision. This educational leader should possess a thoughtfully held vision, grounded in Jewish content, of the kind of Jewish human being and community Jewish education should strive to cultivate, along with a sophisticated understanding of the practical implications of that vision for the school over which he or she presides. Not only is this leader adept at thinking through the translation of ideas into practice, he/she has the capacity to work with teachers, boards, parents, and the Jewish community at large around the understanding, development, and actual implementation of a powerful vision in the life of the school.

More concretely, the successful graduate of the program:

- a. will have developed a thoughtful and well-articulated personal stance at the level of vision concerning the nature of Judaism, an educated Jew, and a thriving Jewish community - a vision that is grounded in Jewish sources and based on a serious encounter with a range of possible visions, with attention to the respective values they embody and their practical implications.
- b. will possess a well-developed conception of a school that includes formal and informal education and that is grounded in a vision of the kind of Jewish human being and community the process of education ought to be cultivating, as well as in serious encounters with powerful educational ideas found in general and Jewish thought.
- c. will know how to develop, support and institutionalize the school's guiding vision through the exercise of the tasks of leadership in such areas as: governance; curriculum development; staff development; budgeting; hiring; evaluation; scheduling; and crisis-management.
- d. will have an expertise in one significant area of his/her work - for example, staff development, informal education, moral education, the teaching of Bible.
- e. will be able to engage, learn from, and educate various publics and constituencies in matters that pertain to the school's aspirations and challenges. That is, graduates of the Mandel Program will be disposed and able to learn from the views of these constituencies; and they will be able to educate these constituencies (for example, boards, parents and teachers) about important issues and policies, framed by larger ideas concerning the aims of Jewish education and grounded in appropriate data.
- f. will have a rich understanding of the outlook, concerns, and communal life of American Jewry in its larger cultural context.
- g. will have sufficient Jewish content knowledge to participate credibly and confidently in the daily life of the school, in deliberations concerning its policies in critical areas like Tfillot, Kashrut, gender, and in representing the school to internal and external constituencies.
- h.. will have the capacity and the desire to engage in continuing study of one or more genres of classical Jewish texts.

It is important to add that the program will be shaped not just by this conception of an educational leader, but also by our understanding of the (in all likelihood varied) strengths and needs of the students we recruit. While some, for example, are likely to come to the program with a rich Jewish knowledge-base, others are likely to bring with them considerable sophistication in the traditional areas of educational administration, such as managing a budget and governance. And it may well be that few, if any of them, will come equipped with a deep understanding of vision-driven educational practice and leadership or with a thoughtfully developed personal conception of Judaism and of the aims of Jewish education. As yet undetermined circumstances of this kind will significantly influence which of the characteristics we hope to see in the graduate of our program will define the program's focus and which ones students will be expected to acquire through individualized study (either through the program or on their own). That said, our guiding assumption is that concerns relating to the role of vision in

high quality education will be central to the curriculum, the general direction of which is suggested below.

4. Curriculum

Running throughout the program will be several strong emphases, including the following:

- a) an emphasis on creating a learning community among the participants that encourages mutual support, respect, careful listening, a willingness to submit one's ideas to critical scrutiny, and an interest in working collaboratively.
- b) an emphasis on the development of a personal stance vis-a-vis the questions and issues that are examined in the program, a personal stance that is grounded in a thoughtful effort to characterize the problem at hand, in serious study of pertinent texts, in awareness and thoughtful attention to other views, and in careful thinking concerning the underpinnings and implications of one's views.
- c) an emphasis on examining the relationship between ideas and practice -- for example, on the power of leading-ideas to guide practice, and more generally, of the implications of ideas for educational practice; on the potential of practice to test, challenge, and/or refine our guiding ideas; on the ideas, commitments, and values that are, for better or worse, implicit in existing practice.
- d) an emphasis on the role of evaluation as a tool in educational practice and improvement at all levels.

The program in its entirety is designed to help participants work towards sophisticated, articulated educational visions of their own, along with the ability to nurture vision-driven practice under real-world conditions. It includes several highly integrated elements, which include: in-depth encounters with powerful texts and ideas that derive from Jewish thought, general philosophy, and educational theory; opportunities to use the questions and lenses at the heart of the program to analyze living educational institutions; and individualized programs of study that are responsive to the interests and needs of the participants. An important feature of the program is that, under the guidance of the program's staff, and through carefully crafted assignments and the Internet, students will continue their education in the program throughout the entire year. This will include opportunities to apply program-related ideas in their work settings and to reflect on this application, thereby deepening their understanding of these ideas and becoming increasingly able to integrate them into their work. These various points are elaborated below.

GROUP LEARNING EXPERIENCES

Instead of being organized as a sequence of independent courses, the group's communal study will be organized as an organically evolving learning experience that includes varied intellectual inputs as well opportunities to shuttle back and forth between theoretical inquiries, deliberations, and encounters with living educational settings. Its principal elements are described below.

“Guiding visions and educational practice.” At the heart of the program is an ongoing core-seminar entitled “Guiding visions and educational practice”, a seminar that will draw heavily on the ideas and materials produced by the Educated Jew Project. Ultimately, the central job of this seminar, as of the program as a whole, is to help students develop a deep appreciation for the power of guiding visions, to develop well-grounded and well-articulated visions of their own, and to become the kinds of educational leaders whose work is actually guided by these visions. Towards this end, the seminar offers participants a succession of opportunities to surface, critically examine, and develop their own fundamental assumptions concerning the nature of Judaism, the aims of Jewish education, and the process of education, as well as to work through the practical educational implications of their evolving intellectual and moral commitments. This process is fed by a variety of inputs:

- a. Encounters with, and comparisons among, an array of powerful conceptions of Judaism (e.g., Rambam, Heschel, Greenberg, Brinker), with attention to the conceptions of Jewish communal and individual life that they suggest.

- b. Opportunities to translate a vision of the ideal outcomes of education into the design of an congruent educational institution and to develop a rich understanding of the multi-layered relationship between vision, educational practice, and evaluation.
- c.. Opportunities to experiment with the use of vision as a tool in educational planning, with special attention to the ways in commitments at the level of vision shape the leader's understanding of his or her role and the approach to the tasks of educational leadership (e.g., budgeting, curriculum development (in a broad sense that includes informal education), faculty development, evaluation, work with boards, response to moral dilemmas that present themselves, etc.).
- d. Immersion-experiences in living educational institutions (some vision-driven, some not; some in general education and some in Jewish education; some to be encountered in real-time and some in literature), with the challenge of unearthing their organizing ideas, identifying their challenges, and formulating recommendations for improvement.
- e. Structured opportunities to develop deeper understandings of the predicament and aspirations of American Jewry, with attention to patterns and trends, demographic data, major issues and debates, and challenges. This includes an examination of realities, trends, challenges and issues in Jewish education in the United States.¹⁶³⁸⁵
- f. Sustained encounters with significant educational thinkers (e.g, Plato, Dewey, Oakeshott, Schwab, as well as classical Jewish thinkers) whose conceptions of education are informed by larger ideas concerning human nature, the human condition, human growth, and human good. These encounters should include meaningful opportunities to explore the place of informal education and Israel-experiences within day school education.**
- g. Examination of the opportunities for and the impediments to vision-sensitive educational leadership in the context of private day schools that are embedded in the complex ecology of Jewish communal and educational institutions.**

Study of Jewish texts. Although the study of Jewish texts will be integrated into the ongoing seminar dealing with guiding visions and educational practice, the program's interest in nurturing the desire and disposition to engage in lifelong learning of Jewish texts makes it important to build into its design the opportunity for a sustained engagement with classical Jewish texts. One possibility is to organize this learning experience around the examination of a variety of rabbinic and other texts dealing with education and with leadership. Another possibility is to offer students the opportunity for a sustained encounter with a single classical text.

INDIVIDUALIZED PROGRAMS OF STUDY

Every student undertakes an individualized program of study, and it is the responsibility of the the program's faculty to offer the student continuing guidance with this program. Individualized programs of study will typically have the following dimensions: a) remedying particular weaknesses; b) developing a special expertise in a particular area pertinent to the work of an educational leader; c) the development of a rich conception of an ideal Jewish school, informed by a thoughtfully developed articulated vision of the nature of Judaism and Jewish life and of the ideal outcomes of a Jewish education; d) serious and regular engagement in a particular genre of Jewish text study. The tutor may, or may not, be locally based, depending on what is possible.

HEBREW STUDY

It is expected that participants in this program will be at varying levels of Hebrew proficiency, and the program itself will be conducted in English. While the attainment of a minimum level of Hebrew proficiency will not be required, the program will make available attractive opportunities for developing greater proficiency in the

Hebrew language -- for example, through stipends that make it possible to enroll in intensive summer Ulpan programs in Israel.

5/6. Format/Site

The program will be organized as a Summer Block Program spread over three summers and accompanied by meetings throughout the year. More specifically:

- a. Three month-long summer sessions spread over three summers. Two summer sessions will take place on the campus of a major university, ideally one (like Harvard) that is situated in a large metropolitan community like Boston. The site should be comfortable and the setting conducive to reflection, concentration and the development of a sense of community.
The other summer of the program will take place in Jerusalem and will be organized in collaboration with the Jerusalem staff of the Mandel Foundation.
- b. In both year 1 and year 2, a fall and a spring visit to interesting schools which will be subjected to careful analysis using lenses and concerns that are central to the program. Possible institutions students will visit include a Waldorf School, the New Jewish High School, and (if a summer trip is undertaken) Camp Ramah.
- c. In both years 1 and 2, the group will gather during winter break for a week of focused learning, probably in the same setting where the summer programs are held. An alternative would be to gather at a conference center that is close to a large and easily accessible metropolitan area.
- d. During periods when the group is not meeting, students in the program will pursue individualized programs of study and will carry out assignments that grow out of formal study in the program. They will also continue their ongoing conversation, now as a virtual community, by means of computer-based interactive technologies.

7. Faculty/staff

- a. A full-time program director who oversees and coordinates all aspects of the program, tracks the progress of students, and also teaches in the program.
- b. A full-time administrative assistant to the director
- c. Approximately 10 faculty members over the three years, with responsibilities both for teaching in the program and for serving as guides to the students as they pursue individual projects and individualized programs of study throughout the year. Possible faculty might include Shmuel Afek, Moti Bar-Or, Menachem Brinker, Johnny Cohen, David Cohen, Arnie Eisen, Josh Elkin, Seymour Fox, Adam Gamoran, Amy Gerstein, Ellen Goldring, Art Green, Moshe Greenberg, Sam Heilman, Melila Hilner, Barry Holtz, Bethamie Horowitz, Daniel Lehmann, Sara Lightfoot, Daniel Marom, Mordecai Nisan, Jennifer O'Day, Daniel Pekarsky, Mike Rosenak, Avi Ravitzky, Israel Scheffler, Bernie Steinberg, and Devora Steinmetz.

8. Recruitment/Marketing/Communications

Recruiting a clientele. Recruiting an appropriate clientele for this program from outside the world of Jewish education is an important challenge which needs to be approached with the utmost seriousness. Joshua Elkin of PEJE should be approached and strongly encouraged to become a serious partner to the Mandel Foundation in the effort to recruit a clientele for the Principals Program. In July and August a comprehensive recruitment plan will be developed; but a number of promising recruitment strategies have already been identified.

One promising idea is to involve emerging and existing day schools in the effort to recruit appropriate individuals, beginning with a letter informing them of the program. The emphasis should be twofold. First, these institutions should be encouraged to turn to the Mandel program in order to meet their needs in the area of educational leadership. Second, they should be encouraged, when they identify and consider employing an inadequately prepared but promising educational leader, to enter into an agreement with the program and this individual that makes completion of the program a condition of employment.

A number of other strategies for identifying promising candidates have also been suggested. One of them is to make a systematic effort to identify superintendents, principals, vice principals, and head teachers now working in general education in either public or private settings, so as to bring to their attention the exciting opportunities for employment and professional growth in Jewish education. Promising routes include the following:

- contact with superintendents and principals who have already made the switch into Jewish education in order to identify likely candidates within their professional networks.
- ads in EDUCATION WEEK, which is read by many public and private school educators;
- using the links that have already been established between Jewish day schools and the independent school world so as to locate people in the independent school arena.
- contact with university-based Educational Leadership programs that might be able to identify appropriate graduates of, or students in, their programs;

Other ways of identifying promising candidates include:

- writing to all congregational Rabbis encouraging them to look within their congregations to find talented educators and other appropriate individuals who might be interested in career-moves into positions of leadership in Jewish day schools;
- contact with Jewish Studies Departments at universities in order to identify individuals with advanced degrees who might be interested in moving into Jewish education;
- using the Jerusalem Fellows network to identify promising candidates.

As part of the overall recruitment strategy, and as a way of establishing the existence of the program in the public mind, it may be advisable for the Mandel Foundation in North America to organize two or more conferences targeted at critical constituencies. There might, for example, be a conference aimed at the leadership of emerging and existing day schools, and another by-invitation-only conference aimed at educational leaders working in general education. These conferences would be designed to highlight the needs and opportunities in the field and the Mandel Foundation's programmatic response.

Critical to the overall recruitment effort will be the development of a well-designed informational brochure that describes both the opportunities in day school education and the Mandel Foundation's new program. Also important for the recruitment process is early identification of an attractive site for the program and an exciting faculty. Publicly announcing these things will itself be a very powerful recruiting tool. Most important of all perhaps will be the identification of an effective recruiter who will take the lead in carrying out a well-conceived recruitment plan.

The application and selection process. It may be appropriate to model our applications and selection process on the Jerusalem Fellows model. This matter needs to be explored during July and August of 2000.

9. The Mandel program's relationship to its graduates

Given the personnel needs in the field of day school education, we expect that those graduates of our program who don't already have positions will readily find employment, especially if the Mandel Foundation does a good job of publicizing the program within the Jewish world.

Over and above placement of graduates, the program should offer its graduates structured opportunities to continue their professional growth once in the field. The following are possibilities:

- a) creating the scaffolding that will enable graduates of the program to continue functioning as a network of individuals who can rely on one another for support and advice;
- b) annual retreats;
- c) consultation-services to graduates as they struggle with the challenges of developing high quality vision-sensitive educational practice in their institutions. One possibility would be to assign experienced, savvy and thoughtful educational leaders as mentors to program participants and graduates who have assumed positions of educational leadership in the field.

10. Budget

The cost of the program. See Mindy Hepner's analysis.

Scholarships and subsidies. Given the needs in the field, no student with strong potential should be turned away from the program for financial reasons. And given that many of the individuals we are seeking could probably find employment in the day school world even without a program like the one we are proposing, we should probably be thinking about incentives to undertake a demanding program like the one we are proposing. Ideally, students will be provided with a tuition-free education and with a stipend to cover costs of participation. Our proposal is that the Mandel Foundation should bear most of the cost of the program, but it is possible and perhaps desirable that organizations like PEJE that have a strong interest in the program should contribute financial resources to make this program possible.

11. Program-evaluation

As part of the design of the overall program, it will be important to conceptualize and build a program-evaluation strategy. This work remains to be done.

12. Feasibility

Everything considered, and in view of the critical need for educational leaders for Jewish day schools, this seems like a program with the potential to make a significant contribution to American Jewish life. There is reason to think that we would be capable of actualizing this program at a high level of quality within a year's time. The most serious challenge we face is that of recruiting a suitable clientele for the program in a timely way. We are aiming to recruit a group of approximately 20 individuals and of launching the program at the beginning of next July.

Gordis and Annette Hochstein; conversations between Daniel Pekarsky, Howard Charish and Barry Holtz; feedback on an earlier draft from Gail Dorph, Mindy Hepner, and Nessa Rapoport; and Bethamie Horowitz's distillation of a recent focus group she conducted with day school principals who have made the transition from general to Jewish education. Most importantly, this document has benefited from intense deliberations at the Mandel Foundation in Jerusalem during the week of June 27, 2000. Participants included: Howard Charish, Seymour Fox, Daniel Gordis, Annette Hochstein, Barry Holtz, Daniel Marom, Daniel Pekarsky, and Joy Rochwarger.

¹⁶³⁸⁴ Examples include the new program developed by the Davidson School of the Jewish Theological Seminary and aimed at preparing high school principals and aimed at individuals already in the field of Jewish education, as well as a program designed to prepare Orthodox school principals.

¹⁶³⁸⁵ One possibility is to use the development of this course as an occasion for bringing together some significant students of American Jewish life for some serious analysis and deliberation, culminating in the proposed course and in a powerful anthology of readings. If this path is pursued, a second possibility is to invite the JCCA to participate with the Mandel Foundation in these deliberations.

FAX TO:

BARRY HOLTZ

HOWARD CHARISH

DAN PEKARSKY

FROM: BETHAMIE HOROWITZ

PAGES (INCLUDING COVER) = 7

NOTES

This is a draft report!

DRAFT

Memorandum

To: Howard Charish, Dan Pekarsky, Barry Holtz

From: Bethamie Horowitz

Date: June 27, 2000

Re: Focus Groups with Principals – “first cut”

This report is based on meetings with six people who made the shift from senior positions in the public schools (principal or higher) to working in Jewish day schools.

On June 14th in NY Barry Holtz, Josh Elkind and I met with Karl Mandel (Hartford Schechter School);

On June 22nd in LA I met with Larry Acheatel, Jeff Davis (both of San Diego Jewish Academy – Larry is superintendent, Jeff is principal of the high school), Rennie Wrubel (Millken High), Nadine Breuer (Wilshire Elementary), and Liz Michael (Yavneh Los Gatos -- elementary).

The purpose of the focus groups was to:

1. learn about the experience of moving from public schools to private Jewish day schools from the vantage point of these individuals
2. identify to key differences between the public versus Jewish Day school arenas as seen by these senior professional leaders.
3. Identify “knowledge gaps” – areas of perceived need -- in moving from the public sector to the Jewish day school--- *as seen by the participants.*
4. Hear participants’ reactions to a Mandel Principals’ Initiative.

Three main topics were addressed in the focus group.

First, participants’ views of the differences between the public school and the Jewish day school, and the issues involved in making the shift from one context to the other.

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Second, the participants' views of themselves – their professional identity: the relationship between being an educator and working in the Jewish day school/Jewish community.

Finally, the participants' sense of what sort of training program would make sense for people like themselves—"the Mandel Principals' Initiative."

[A copy of the focus group protocol (used in LA) will be attached to the end of this report. In addition, participants completed a short questionnaire at the end of the meeting.]

How they were recruited:

Not one of these people was actively seeking to make a change, it seems. Two of the six were approached by known search firms (who knew them from public education searches) They would never have considered moving, and at first did not seem at all interested. Each was seriously wooed by school search committee and key players (including funders).

Three heard were known to the search committee through prior involvement with the school/temple/rabbi. These people won out the competition. But they, too were not planning to make a move.

Comparing Settings: Public versus Jewish day school

Why leave? Frustrations with the Public system

Four of the six participants were particularly vocal about the frustrating aspects of working in public education (All four were California veterans – the other two worked on the east coast before, making the move to Jewish schooling). They spoke about the California State Educational Code – the myriad regulations developed by legislators (who know little about schools)-- testing, the very strong and entrenched teachers' union (and its regulations). All in all, they summed up the negatives of working in public education as the "difficulty in thinking out of the box."

The upshot of this shared frustration was what one participant called the "ongoing conversation in the teachers' lounge – "what if we could start our own school." This conjures up an image of enthusiastic and creative teachers who are dying to get out from under the mass of bureaucratic detail that locks them in place. [NB: These participants have been working in public education from 22-36 years!] So there were "pushes" motivating at least some of the participants to make the move.

Attractions of the Jewish day school

* Being able to create your own school

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* One of the primary attractions of working in a Jewish school for most of the participants was the sense of the school's moral underpinnings – a sense of the vision of the school linked to a more profound framework. As one participant (an elementary school principal) said – in the public system you spend a lot of time keeping God out of the school. If a child became involved in drugs or cheating, the most you could ask was, "Do you know the difference between right and wrong?" But in a Jewish school you don't need to "stop short" in this conversation. You can speak about "how we treat each other." (i.e. creating a community?)

This moral /values-related aspect arose when participants spoke about their sense of themselves working in the Jewish world. A number of them prefaced their remarks by saying, "I have always been against vouchers, but..." Many saw themselves as having entered the field of education as a means of making the world a better place, helping kids who really needed help.

In this context these educators have had to explain to themselves why a Jewish private school, typically serving a rather well-to-do community, is a good place for them to be working. Their answers were quite interesting: they view the Jewish school as being the place to address the Jewish community's sense of entitlement (arising from it's wealth).

Kids say they get something because "I deserve it." "My job as an educator is to show them that that's not true. These are a bunch of rich kids. But these kids will be leaders in numerous fields. By being in the Jewish school I can help shape them a bit—in their values."

* A couple of participants liked the idea of working in a Jewish setting because they viewed this as a means of integrating better the human and the spiritual. "I wasn't unhappy with the public school, but I felt there was more that would nourish me [in the Jewish day school]."

* As in any private school, it's easier to implement a new idea quickly. You can also "set your own graduation date." Participants appreciate the lack of bureaucracy (but they don't like the flipside --the unprofessionalism of the Jewish schools).

Pluses of the Public system

Although the bureaucracy has its problems, it also has its benefits:

* Well-developed organization: lots of central office resources, like professional development opportunities, teaching materials.

* Great retirement (pension) plan (at least after 22-36 years!). Most felt this was the biggest thing they had had to give up – although a couple spoke about getting the Jewish school to

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make this part of the compensation negotiation. Two participants spoke adamantly, "No one should have to give that up to work in the Jewish day school."

* The Principals benefit from existence of separate departments (at the district/state level?) for various functions: personnel (interviewing, recruitment); business (ordering supplies, payroll) (- In public system a principal's budget is limited to curriculum, supplies, etc. - but not salaries) .

Challenges in the Jewish day schools:

* Moving into Jewish schools requires wearing more hats than most of these folks have donned before (exceptions—Karl Mandel and Larry Acheatel, both of whom had broader, system level responsibilities over the course of their careers). For instance, aside from board recruitment and development (which public school principals don't deal with, although superintendent has to deal with board relations), the principals in the Jewish day school have more financial and budgetary responsibility (or at least interface): they need to be involve in fundraising, in thinking about the school's endowment, negotiating teachers' salaries (here they almost missed the union pay scales - but not quite).

* One participant spoke about the day school as a "mom and pop" operation - with the principal wearing too many hats. All of them are working to professionalize the systems they're in and in some cases their jobs. Thus, for example, at least one of the principals has hired a business manager. Others have created more administrative staff roles (deans of students, of curriculum). But many of them have had to "walk into bathrooms with a plunger" (literally!).

* Later in the LA discussion one participant made the comment that the boards of Jewish schools don't realize that "we need much more sophistication in every domain. The (tuition) dollars aren't paying for a top-notch school. We need to upgrade expectations, standards and quality" of the school.

So the principals recognize that the operational baselines are different in the public and Jewish day school settings. The public school educators view the Jewish schools as unprofessional. In contrast, Josh Elkin spoke about the need to convey to people a sense of what life is like inside a Jewish school -- the "behavioral and organizational regularities of the normative Jewish day school."

* Re: educational vision> These educators view this as something they already do and think about. The uniquely Jewish piece seems to elude them, I believe. All participants spoke about articulating and developing a vision of the school, and getting the teachers on board around this. Only a few of them realized in advance how important it would be to work with the board around this vision -- this was something they wish they had known in advance of making the move.

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They see themselves as quite skilled in administration, in community process – working through issues with staff, students, parents. Even though they haven't dealt with the specifically Jewish situations that arise, they feel themselves to be highly skilled and able to handle a full range of problems. They know when to call on Judaic expertise from rabbinical figures on their staffs. But they feel that others (unclear who) don't necessarily expect this of them (in advance). Usually the rabbi's authority is what is expected. Yet these educators say they have succeeded in considering big issues that affect the school community. .

Professional Identity

These professionals view themselves as different from "Jewish educators." They see themselves as educators work in Jewish schools. In general they do not particularly admire the Jewish educators they've encountered. They view them as unprofessional, and not "cutting edge" in terms of their awareness of advances in the field of education. Not surprisingly, they don't view the conferences (CAJE) as particularly useful, although they all expressed a great sense of isolation in their new jobs and a need for serious networking.

These folks LOVED meeting one another. They were excited to meet colleagues they admired, and at breaks began comparing notes and exchanging numbers.

The Mandel Principals' Initiative

Idea of a month long summer meeting seen as *highly unrealistic* time commitment

Rather, general reluctance to devote much time to a program that appears to be of limited value: "one day at the beginning and one day at the end of the year."

These were the initial reactions to the idea of a principals' program. But then they got excited when they started to imagine what they would want to do. A number of people described what sorts of formats would work -- elite, program with lots of cachet. The following were mentioned as interesting worthwhile endeavors.

1. Christian Johnson Foundation runs a week long program:

- * participants are nominated by other educators (perceived excellence, community of peers)
- * 1 week at a great resort
- * study each morning (philosophy)
- * free afternoons

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- * fine dining and entertainment
- * yearly reunion
- * having dialogue, discussion what's going on in the schools, forming relationships

2. USC runs a seminar for 40 educational leaders where they meet with top leaders in other sectors – government, business/industry. Small group meetings, over several days.

3. Harvard Principals Program

Meeting in Israel would be a draw for this group. (A quick show of hands revealed that all or nearly all had visited Israel at some point in their lives.)

In contrast, although “networking” was seen as a much needed aspect of their new work settings, the participants feel separate from the cohort of “Jewish educators” that goes to CAJE, and a number of the other networks. They view PEJE favorably, AviChai as an org that does things its own way. They were VERY appreciative of Mandel effort to hear their views IN ADVANCE of designing a program. (In contrast, AviChai's Pardes-Hebrew U defines a problem – lack of Judaic teachers, but doesn't give them experience in American Jewish schools.)

MANDEL FOUNDATION

Day School Principals Program

Timeline

Date	Recruitment and PR Activities	Program Development and Planning	Administrative Activities
June, 2000		Focus groups-New York and LA Develop first iteration of Program	Develop budget
July, 2000	Develop recruitment plan Develop PR plan	Hire program director; hire program assistant Israel seminar discussions Develop second iteration of Program Development of evaluation plan	Refine budget based on Israel seminar
August	Develop recruitment plan (cont.) Develop PR plan (cont.) Develop materials for advertising the Program (e.g. brochure) Discussion with Josh Elkin re possible candidates	Develop second iteration of Program (cont.) Development of evaluation plan (cont.) Choose planning team ("PT")	

Date	Recruitment and PR Activities	Program Development and Planning	Administrative Activities
September	Contacts with lay leaders of schools that are seeking directors Contacts with lay leaders of schools that have recently	PT meets for 2 days to discuss and critique second iteration of Program PT discusses evaluation plan	<ul style="list-style-type: none"> • Mail letters to contacts • Place ads and other follow-ups

	<p>hired directors from general education Placing ads and other follow-ups Letters to possible contacts re possible candidates to recruit PT discusses and specifies application process and procedures Create Admissions Committee</p>		
October	<p>Prepare application materials Contact with possible candidates</p>	<p>Develop third iteration of Program based on PT feedback Faculty identified and recruited</p>	<p>Explore sites</p>
November	<p>Contact with possible candidates (cont.)</p>	<p>PT meets again to discuss third iteration Fine tune Program based on PT discussions</p>	
Date	Recruitment and PR Activities	Program Development and Planning	Administrative Activities
December	<p>Interviews</p>	<p>Fine tune Program based on PT discussions (cont.)</p>	<p>Book site</p>
January, 2001	<p>Interviews</p>	<p>Israel meeting: to discuss and critique Program, report on recruitment situation, etc. PT meets again to discuss results of Israel meeting re Program Tutors recruited Individualized conversations with faculty in advance of February meeting</p>	<p>Book food service</p>
February	<p>Selection process</p>	<p>Tutors recruited</p>	

	completed	(cont.) Meeting of entire faculty plus tutors	
March	Work on financial arrangements for participants	PT meets again to discuss results of faculty meeting and adjust Program	
April		Staff refines final version of Program	Book transportation
May		Creation/xeroxing of materials	Book AV for site
June		PT meets again	
July	PROGRAM LAUNCH@@@@@@@@@@@@@@@@.		