



THE JACOB RADER MARCUS CENTER OF THE  
**AMERICAN JEWISH ARCHIVES**  
A DIVISION OF HEBREW UNION COLLEGE – JEWISH INSTITUTE OF RELIGION

**MS-831: Jack, Joseph, and Morton Mandel Foundation Records, 1980-2011.**

Series F: CIJE Accrual, 1981-2011, undated.  
Subseries 2: Dan Pekarsky, 1981-2011, undated.

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Strategic Plan. Jewish Educational Leadership (JEWEL) planning.  
Blockplan, 2000.

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TO: Mandel Foundation North American Planning Team  
FROM: Daniel Pekarsky

1) Below is a template, perhaps (depending on your wishes) final, to be used for the development of the options-sketches. The template has profited from input from another individuals. Note, in particular, item #5, the newest addition, which asks about what the program might actually look like. Howard had suggested this category initially, and I was skeptical about including it (on the ground that actually imagining the program seemed to me a more appropriate challenge down the road, when we had already made a decision concerning target-population ). But Annette seconded Howard's opinion, suggesting that, even if the program-sketch is no more than a first iteration, it may help to clarify that might be involved in mounting this particular program. So, with the hope that the program-sketch that is developed not be viewed as a substitute for serious deliberation concerning program-shape down the road, I am including a category that is responsive to Howard's and Annette's suggestion.

2) As of now, here are the assignments I am imagining:

**Howard Charish:** Jewish communal leaders

**Josh Elkin** (with whom I met on Monday): a) a program designed to cultivate day school principals that is aimed at individuals in general education; b) a program designed to cultivate day school principals that is aimed at non-principals working within the day school universe.

**Daniel Gordis:** a) Congregational rabbis; b) a program modelled on the Jerusalem Fellows, with Daniel Pekarsky offering input on the content of this program.<sup>1</sup>

**Daniel Pekarsky:** a) Educational planners (working in Bureaus or Federation-settings); b) the City Team ideas.

**Note that the JCC target-population has been excluded from this list. Since we're pretty confident that we are going to do this group, and since we have limited resources for carrying out the work over the next few weeks, we decided to focus our energies in the short term on groups about which there is more uncertainty. It would nonetheless be very important, in the near future, to develop a sketch pertaining to the JCC-clientele that addresses the questions found in the template. Among other things: what that program will look like, and the amount of resources it would consume, will have a bearing on other decisions we take.**

3) As noted in a footnote to the Template, Leah Strigler has accepted an assignment gathering data that will support the various sketches. Though not much systematic data-gathering is possible with so little available time, some critical pieces of information should be obtainable. I

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<sup>1</sup>Note that I have not yet confirmed with DG his comfort-level with this assignment. He and I will need to discuss this, and it is conceivable that his and my own assignments may shift.

{ca 2000} (1)

have been in touch with Leah about some of the pertinent items, and am suggesting to those writing sketches to contact her about particular pieces of information that they feel they need. Leah has also been actively thinking about quick-and-dirty routes she can take to get the requisite data in a short time. Among other things, this exercise may help us identify important data that we may want to gather in a more systematic way down the road.

4) I would suggest the following plan for moving the process along. (Note that I have only cleared a. and b. with Howard, which means that this really is no more than a proposal to be discussed):

- a) Use the next two weeks to develop preliminary sketches.
- b) In mid-March, the options that will have been developed will be the subject of one or two open-ended discussions designed to assess them. In addition to Howard Charish, who is to use these discussions as a way of clarifying his own thinking, participants will include Gail Dorph, Adam Gamoran, Ellen Goldring, Barry Holtz, Daniel Pekarsky, Nessa Rapoport, and Leah Strigler. If possible, Daniel Gordis will participate by phone. Josh Elkin has volunteered to participate if we think this useful. We have yet to decide whether all these people together should meet with Howard, or whether there should be meetings with two sub-groups. In either case: **it is critical that that a set of guiding questions be developed that can help us organize this discussion and have a basis for deciding among, or determining an optimal combination of, options. Nessa has already given some thought to this matter. Note, though, that no decisions, not even preliminary ones, are to be taken at these meetings.**
- c. Following these meetings, Howard will meet with a smaller team that will include, at a minimum, Gordis and Pekarsky, to make preliminary decisions based on the options-sketches and taking into account the discussions that have been had.
- d. Howard will bring the results of these deliberations, along with the sketches, to the core MFNA team (the group that met in Jerusalem in January) for review and development.
- e. Based on this process., both the options-sketches and the proposal may be revised, and a document will be prepared for presentation to the Steering Committee.

**Needless to say, suggestions for improving on this proposed plan would be most welcome. I hope this proves helpful I moving us along.**

Option for Leadership Initiative

JEWISH COMMUNAL PROFESSIONALS

Prepared by Howard E. Charish

**1. Target population/leadership positions**

This program will be created for mid-career senior professionals

Who in one to two moves will become the chief professional officer (variously called president, executive vice president or executive director) or the chief operating officer of national organizations such as United Jewish Communities, Jewish Community Centers Association, Hillel, Jewish Community Policy Agency, Jewish Education Service of North America, Israel based institutions, as well as local organizations such as federations, JCCs, family agencies, Bureaus of Jewish Education, CRCs, etc.

This target population is already in Jewish communal service and probably has a minimum of ten years of professional practice.

**2. The Case for Focusing on these Leadership Positions**

The Council of Jewish Federations issued the findings and recommendations of its Commission on Professional Personnel in 1987 entitled *The Developing Crisis*. At that time the consensus was that "the staffing of federations did not keep pace with the dramatic increase with responsibilities." Among the issues cited were the growing number of vacant positions, the phenomenon of "musical chairs" of moving professionals from one city to another without significantly increasing the pool, and the lack of necessary education and training given the complexities and urgencies needing to be addressed.

Seventeen years later the personnel shortage both in quantity and quality persists. In a recent interview with Joel Daner, UJC associate executive vice president for personnel services, it was reported that currently twelve executive director positions are vacant along with four assistant director and 18 campaign director positions. Joel indicated that the competition has increased from other non-profits for these senior professionals particularly for campaigners and that filling the vacancies with the highest caliber of professional remains a major challenge.

The situation in federations is not unique. Shortages are also reported across the Jewish communal spectrum. One must also consider that even if the Jewish community had made adequate provision to significantly increase the corps of qualified professionals, the recent explosion of interest in things Jewish very likely would outstrip the preparations. Furthermore, some fields were not even envisioned previously such as

community educators, informal educators, development officers and marketing and communications professionals. When speaking to David Edell, the president of an executive search firm, the shortage in the Jewish community is also mirrored in health care and the arts. He also stated that little executive training exists that is cross-functional and interdisciplinary.

Furthermore, the definition of leadership is changing. Edell comments that chief volunteers today want their chief professionals to be social entrepreneurs who can bring together and when necessary create the resources to accomplish the agency's mandate. Greater value is being placed on the external functioning of the executive and his/her expertise in change management, government relations, public visibility, and engaging people of wealth and power. No longer is the executive expected to be an enabler and facilitator. He/she must demonstrate upfront leadership, articulate the agency's vision, and exhibit operational acumen.

Given the dearth of educational leadership programs compounded by the drastically changed environment and persistent personnel shortage, a communal professional initiative warrants serious consideration in order to address the systemic change necessary in order to maintain vibrant Jewish life.

### **3. Why is the Proposed Target Population Worth the Investment**

Focusing on the chief positions in Jewish institutions reflects the belief that profound change needs to begin at the top. The continued building of a flourishing communal enterprise requires the engagement of the visionary capacities and leadership of the key professionals. Moreover, whatever educational programs have existed has been segmented for the specific field of interest. It is important to provide a setting in which senior practitioners from throughout the community can deliberate, learn, experiment and test in a collegial, collaborative, pluralistic milieu that in microcosm will provide the strategies for the larger community. At this point in time no such national opportunity is available.

### **4. Desired Educational Outcomes of a Mandel Program Organized Around this Clientele**

The basic principles in creating leadership are directly applicable to the program goals. These include leadership that is grounded in vision and that culminates in a professional identity strong in theory and practice. The emerging executives will be exposed to great ideas in Jewish text and the humanities so that they can develop a vision committed to implementation.

## **TEACHER EDUCATOR INSTITUTE (TEI)**

**Target Population: senior educational personnel whose portfolio includes helping teachers teach well**

Bureau directors  
Central Agency directors plus other personnel with responsibility for professional development  
Congregational School principals  
Resource Room directors  
Early Childhood directors/ lead teachers  
Judaica coordinators of day schools

### **The problem the program comes to address**

The CIJE Policy Brief, *Background and Professional Training of Teachers in Jewish Schools* (1994), shows that the teaching pool in our schools is committed and stable, but woefully underprepared to do the work. Yet, it is well-known that:

What teachers know and can do makes the crucial difference in what children learn. And the ways school systems organize their work makes a big difference in what teachers can accomplish...Student learning in this country will improve only when we focus our efforts on improving teaching (p. 5). *What Matters Most: Teaching for America's Future*, Report of the National Commission on Teaching & America's Future, September, 1996.

This suggests that the professional development of teachers must be at the heart of any effort to upgrade any educational system. Given the weak preparation and background of this teaching pool in Jewish education, it is even more critical than similar strategies in general education. Yet our research (Holtz, et.al. *Changing the Core*, Journal of Jewish Communal Service, Spring, 2000) has shown that professional development for teachers tends to be infrequent, unsystematic, and generic, not designed to meet teachers' content or pedagogic needs.

### **The case for focusing on these kinds of people / in these kinds of positions**

These people are in senior educational positions in their communities; these are leverage positions in the Jewish educational system. They are locally based, but interact with thousands of teachers in an ongoing way. The educational system is already organized for teacher education to be part of their work. But professional development aspect of their work is either not treated with appropriate

seriousness or they are insufficiently prepared to do the kind of work that is required.

### **Emphases and Aims of program/Content and Structure of Program**

The Teacher Educator Institute (TEI) is a two-year in-service program, to create a national cadre of teacher educators. The central goal of TEI is to develop leaders who can mobilize significant change in teaching and learning through improved and creative professional development for teachers in their institutions, in their communities, and on the national level. The core elements of study include: current thinking about issues teaching and learning in the classroom; Jewish content, including engaging the participants in issues of personal religious connection to what it is being learned in Jewish schools; knowledge of teachers as learners; the latest ideas about effective professional development; and organizations/systems/ within the Jewish community. TEI graduates are catalysts for change who are substantively grounded in ideas and concrete practices, and who also have a deep understanding of instructional improvement and educational change.

In order to create an experience that allows time for the development of and reflection about new ideas and practices, opportunities for experimentation, and feedback, TEI participants meet six times over the course of the two-year period. There are also assignments and follow-up work between group meetings.

Participants have included educators who work in central agencies and principals of supplementary schools, early childhood directors and family educators. Thus far participants have been invited to join TEI as members of educational teams. The team structure is an integral part of our change strategy. It facilitates the creation of local cohorts of educators who have shared an intense learning experience and a common vision of powerful Jewish teaching and learning and good professional development. They can, in turn, plan and implement similar experiences for others in their own settings.

### **Feasibility/success, etc**

We have learned in the evaluation program currently being conducted about TEI that the program has had a powerful impact on past participants. Our past successes indicate that it is possible to recruit such clientele and we have already had requests for another cohort. It is clear that we will have interested participants and we now have a great deal of experience in running a top-notch program whose quality has been recognized nationally.

## TEACHER EDUCATOR ASSOCIATION (TEI ALUMNI GROUP)

### Target Population:

90 graduates of first three TEI cohorts

### The problem the program comes to address:

By May we will have 90 graduates of TEI. These senior personnel are in the vanguard of a movement to reconceptualize and revitalize professional development for Jewish teachers (particularly those in supplementary schools) in this country. Because educational change takes a long time and is complex, it is important that we continue to work with the graduates of our programs, strengthening their ability to continue the work that they have started in the program.

### The case for focusing on these kinds of people / in these kinds of positions

We have invested 2 or more years in the education of these senior personnel to date. They are at the point of designing and implementing new kinds of professional development that are much more intensive and complex than what they or the community/institutions have known before. We are becoming more aware of how complicated the work from the current evaluation work on current TEI graduates (the evaluation case studies which are being supervised by Susan Stodolsky).

The following chart illustrates in schematic fashion some of the differences between what they were providing before (old paradigm) versus the elements of what we hope they will be providing now (study group model):

Training Model	Study Group Model
One-shot workshops	Sustained, ongoing deliberations
Disconnected from teachers' work	Part of teachers' work
Focused on generic strategies or subject matter	Focused on specific subject matter and the teaching/learning of subject matter
Participants as individuals	Participants as members of learning communities
Oriented around answers and solutions	Oriented around questions and investigations of practice
Based on a view of teaching as technical work	Based on a view of teaching as intellectual work

Professional development serious enough to result in change in the classroom takes a great deal of time (and a lot of small changes) before one can see fundamental change. Most large systems – and even small systems such as schools – are famously impatient about change. To invest in professional development requires a belief in the long-term effectiveness of such measures, a guiding principle of this Foundation's programs.

### **Emphases and Aims of program/Content and Structure of Program**

These educators will be more effective if there is a strategic plan that continues to support and extend their learning after the TEI program. Such a program would include:

- An annual conference geared to introducing new ideas and strategies and sharing successes from the field
- Active and interactive listserv (which is already in place)
- Limited on site communal/institutional consultation
- Phone/ email consultation on particular projects

Providing ongoing intellectual and programmatic support and mentoring in the form of seminars, networking, feedback, and consultation make good sense as these are ways of "pushing" the members of this group and the systems in which they work.

As a strategy, this work is in keeping with what we know about educational change. The emphases of this program would be on helping these educators plan and implement ongoing, intensive content-driven professional development for teachers in Jewish settings. The program would continue to work on advancing infrastructure support issues in local settings and on the communal and national fronts.

## Howard Charish

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**From:** Annette Hochstein [annette@vms.huji.ac.il]  
**Sent:** Tuesday, March 14, 2000 2:21 AM  
**To:** Howard Charish  
**Cc:** Danny Pekarsky  
**Subject:** Re:

Howard,

thanks for the cc on this. This reply to Pekarsky and you only. I think that Adam (with Ellen who is his team mate- but Adam mostly) can be most helpful to you in presenting the findings of his work for us - in addition to addressing the points you raised, . He should teach you what he has learnt. In particular I hope that he will give you a concise aggregate presentation of what we know about teachers in particular based on their educators; surveys in Baltimore, Atlanta and Milwaukee as well as the further surveys done in Cleveland and perhaps elsewhere. This will give you the stark image of the absence of professional training among those who "do" Jewish education and the hopeful one regarding motivation, commitment, retention. In addition they might give you a presentation on the lessons of Lead Communities. Important for you to know.

To my mind the regrettable aspect of this work is that the data collection work was done many years ago and not continued. They will argue that Chicago is a continuation of sorts. Which it is of course - but at a time when our agenda has shifted.

They will and should tell you too about "building a research capacity for North America". This was a part of our agenda particularly close to their heart but it has moved to the strategic agenda of the foundation rather than the in-house-research level. The foundation is asking itself what steps will lead to building the profession (e.g. establishing chairs at general universities? seeding research? etc...). Adam and Ellen's work with the Mandel endeavors has done much to build an initial thrust to academic work for Jewish education. I hope and believe they will play an important role in the next, strategic round too.

You should have a wonderful and fruitful time with time.

[March 14, 2000]

annette

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

From: Howard Charish <hcharish@mandelny.org>

To: Ellen Goldring <ellen.b.goldring@vanderbilt.edu>; Adam Gamoran <gamoran@ssc.wisc.edu>

Cc: Annette Hochstein <annette@vms.huji.ac.il>; Danny Pekarsky <danpek@macc.wisc.edu>

Sent: Monday, March 13, 2000 6:01 PM

> Dear Ellen and Adam,

>

> I am very much looking forward to our time together on Wednesday. In

> advance of our meeting here are some items that I hope we will cover.

> Please feel free to add your suggestions.

>

> 1. Since it is our first time together, I would appreciate hearing about

> your professional backgrounds

>

> 2. When did you intersect with the Mandel Foundation and the scope of the

> relationship

>

> 3. A description of your current assignments with us

>

> 4. A critique of the work of MFNY to date. It seems that MF Israel has

had

> glowing success. What factors do you believe would contribute to that

> outcome in North America, particularly as we consider launching new

> initiatives. How can we build on our past accomplishments; what should we

> avoid

>

> 5. As we go forward, how would you envision your relationship with MF.

>

> Best regards,

> Howard

>

## Leah Strigler

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From: Leah Strigler [lstrigler@mandelny.org]  
Sent: Monday, March 13, 2000 5:39 PM  
To: Howard Charish; Danny Pekarsky  
Subject: Gil Graf

Here are my rough notes from my discussion with Gil. I will not have time to clean them up before tomorrow morning but wanted you to see them.

Leah

Gil Graf, Director, BJE, LA

March 13, 200

6 or so programs:

1. four annual conferences, day long, different cohorts: early childhood, last week 1200 participants  
annual p.d. day for religious schools teacher and principals, 500 people  
speacial day for teachers and principals in libeeral day schools, 500 people  
orthodox, 600 teachers and principals

2. multi-session opportunities  
three things:

structure a variety of programs in array of diosciplines: special needs, arts, Hebrew lang., teaching siddur, offer workshops throughout year of three to ten sessions. Offering these tends to attract day school more than supplementary school people, so program bringing in-service to school house, look for geographic areas and form triads of schools, i.e. just after school lunch and in-service, rotating venue, multiple sessions right at home, with participation of principals framing issues most suitable to faculty. Cluster Workshops.

Partnership Program with three higher learning institutions, YULA, UJ, HUC. Have worked out with them partnership courses, semester long. Vary from issues methodology to substance/ subject matter. conent knowledge. work arrangements economically feasible to access courses. Course could be \$1200, work out with them not just subject, look for instructors sensitive to issues, and BJE subsidizes course so that registration fee is easily available. Universities also discount courses.

Take inventory, many providors of courses and opportunities. Have personnel salary schedule and causes reality that teachers take continuing education will get paid more. Disseminate info. about other opportunities. counting towards CEU requirements.

More tailored:

Marlynn could tell about, Machon Lemorim. Burgeoning day school population, teachers, especially of Judaics, in short supply. Look at liberal school general ed. teachers who have significant backgrounds, could become well-qualified Judaic teacjers, good additions to faculty. IDed 15 such people and they are in 3 year program continuing to teach while taking a course every semester and summer in proscribed regimen of what think should study, monthly colloquium to discuss issues in Jewish education, supervised work in Jewish Studies, under Marlynn's, now David's, guidance. 3rd of 3 years.

Mentor teacher program, know first years a lot of challenge can benefit from mentors, grant money, seven schools where there is a master teacher for each two mentees. Working how to take accumulated wisdom to help protoges, and mentees retreat program few days. First year right now. David Ackerman.

2 religious schools: 1 in place, other just received grant:

1. certain examples excellence, if allow people to observe and discuss, will translate into some benefit in own classrooms. ID superior religious school teacher, set up sessions conducts class and people invited, get copy curriculum for that day, intro. to what about to see, after lesson get seminar on what went on, why planned and enacted so, opportunity for interaction. Master teacher gets 30K. End of second cycle. Any given person comes at least twice. Typically not teaching class, so schools paid for substitutes for observers. Been well-received. That benefit, source of growth. Attach to that professor of ed wo helps to add to the discussion and unpacking of what going on.

2. Initiating Moreynu: an avocational teacher training program, IDed 6 synagogues asked R,C, ED to help ID congregants for training to become synagogue school educators. 2 year program to prepare them.

Incidental, four principals councils. ECE, RS, LDS, ODS. Bureau meets with monthly, design p.d. for themselves, two-day retreats and ID collective issues for the group. Will bring in people to work with: Ex. GZD for synagogue school principals.

Also UJ and HUC graduate program, common to have interns at BJE, as part of pre-training growth and preparation are in setting of BJE with staff as mentors.

Federation - no p.d. Organized security seminars after shooting last year.

Local institutions, not pre-service. UJ has annual one-week institute end of June. Attracts some L.A. people. BJE gives local educators stipends to that. (Part of inventory.) UJ also has major series offerings continuing education every type. ceramics, krav maga, etc.

HUC does not really have continuing. Do tailor course with them.

Try to access whatever eligible for from government authorities. Opportunities accessing through L.A. unified school districts, responsibility to private schools. BJE Director continued meets with that office to determine what entitled to. Good participation.

Within BJE, dozen educators, own staff has professional development opportunities. TEI, teaching of Hebrew (Aviva).

Lay people? Very active school services committee. Asking large Q what can BJE do to enhance what in schools, helps oversee, meets annually with principals councils, sends out surveys, to do needs sensing to see what to offer. Head of committee Ph.D. in evaluation, does assessments for profession.

Dr. Ron Reynolds guides professional development program.

Cultural institutions? Wiesenthal, does not relate to work much, Skirball Center, recently come to offer continuing ed. programs along lines of UJ, except more focused on American Jewish experience. May in future be program suited to needs. Small program Zimmer Jewish Discovery Place, do not have continuing ed programs.

Some in-service opportunities in collaborations. One with Federation - opened own Holocaust Center at same time as opening of Wiesenthal Center. FT professional, does have some continuing ed. on Holocaust ed. Some programs with Jewish Family Service.

## Howard Charish

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**From:** Mike Austin [mjaustin@uclink4.berkeley.edu]  
**Sent:** Monday, March 13, 2000 2:55 PM  
**To:** hcharish@mandelny.org  
**Subject:** Preliminary Feedback

Howard -- Thanks for the fax, not sure what happened to last week's email. I've divided my feedback to you into two categories: 1) critique of the current template, and 2) proposed outline for a Jewish Communal template. All this is preliminary since I need your feedback before proceeding to flesh things out as well as not waste time going down roads that make no sense at this time.

1) The current template appears to reflect very much of an educational program bias (What's a teacher without a classroom? What's a principal without a school?). It focuses on organizational roles, like rabbi, without first addressing the nature of educational institutions and the obstacles they face internally and externally. It seems to move prematurely into selecting target populations and building program without a more systems perspective on the changing nature of education, its institutions, and the human resources needed for the future. It has more of a crisis management flavor (shortage of principal, go to general education to recruit) than a strategic approach based on how the challenges are framed or a vision explicated.

2) As a result, it seems to me that the Template for Jewish Communal Service ought to be more focused on the challenges presented and the target audiences affected. For example, the challenges could be organized as follows into three categories (leadership, organizational, and human resources) using some of the items on your laundry list of issues:

A) Leadership challenges: 1) Community visions, 2) Commitment to Israel, 3) Emerging role of philanthropists, 4) dealing with the speed of change & technology, 5) etc.

B) Organizational challenges: 1) Changing roles of Jewish community institutions

(synagogues, JCCs, Jewish homes, Family Service, Education Bureaus, Cultural orgs, federations, etc.), 2) Changing roles of national Jewish organizations, 3) Changing patterns of collaboration (strategic alliances & resource sharing) and creative programming (grassroots orgs.), 4) Changing patterns of financial resource development, 5) etc.

C) Human Resource challenges: 1) Analyzing staff shortages, 2) Redefining staff qualifications, 3) Rethinking succession planning, 4) Restructuring lay-professional relations and development, 5) etc.

It seems to me that each one of these major challenges would benefit from bringing together the best minds in the form of think-tanks or task forces that might use the following template FOR EACH OF THE THREE CHALLENGE AREAS that

might lead to the development of multiple options (some to be addressed by

Mandel but others to be addressed by other organizations):

Task 1 -- Mapping the multiple challenges and identifying strategic linkages between them

Task 2 -- Identify multiple target populations for each of the major challenges

Task 3 -- Develop multiple processes to reach the target populations (not just training)

Task 4 -- Develop a series of pilot programs to reflect the multiple processes

Task 5 -- Develop multiple outcome criteria and monitoring/evaluation processes

As you can see, the emphasis is on "multiple" given the complexity of the issues facing Jewish communities (one size generally does not fit all) and the need to experiment with multiple strategies to address the issues.

Looking forward to your feedback and marching orders on where you want me to proceed with respect to the further development of these and other ideas. Mike

## Howard Charish

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**From:** Howard Charish [hcharish@mandelny.org]  
**Sent:** Monday, March 13, 2000 8:19 AM  
**To:** Michael Austin  
**Subject:** Building the case

Hello Michael,

Hope you are well. Had dinner with Larry moses, Cindy and her husband two nights ago. Larry is very pleased about Elka and lots of other things. It was great to have this mini reunion.

Per our phone conversation I am listing below, as a first iteration, the issues I see facing the Jewish community that present obstacles to continued vibrant progress:

1. Lack of clear vision by the professionals and volunteers of what the entity, organization, community is supposed to look like. For example, those agencies that are truly humming are ones with execs who have a lucid, unambiguous conception of what is needed. Issues of leadership and vision.
2. Most exciting initiatives seem to taking place at the grass roots level and not through our national bodies.
3. The dearth of collaboration as the method of problem-solving. We still have too many walls around our structures, too much competitiveness, and a serious lack of resource sharing locally and nationally.
4. Severe personnel shortage. Even if we had made appropriate preparations, the current explosion of things Jewish in education, the arts, social services, camping, etc. has far outstripped the present pool of professionals available.
5. The pre-eminent forces that have melded the community together no longer exist. Now that the up building the state of Israel and rescuing Soviet Jewry have been accomplished, what organizing priorities exist today that galvanize our entire community?
6. Change has happened so quickly that is difficult to absorb it. What our business was is not what it is now. Consequently many feel unprepared and nervous about the new reality. No evidence that the major questions are being addressed through serious deliberation that is inclusive.
7. Rise of the mega-philanthropists who for the most part operate independently and not necessarily in concert with the communal needs. Many of them do not support Jewish

causes at the proportionate level that their predecessors did. Contributions to health care institutions and universities have far exceeded their gifts to the Jewish community. Their children and grandchildren may even be less inclined to be supportive.

8. Not enough appreciation of the role of synagogues in shaping Jewish life by federation leadership. By the same token many synagogues are self-serving institutions that do not value their role in the communal enterprise.

9. A weakening of the moderate/middle stance of Jews. There is greater polarization and less acknowledgement of our interdependence.

10. Jewish life has depended on the communal overlay of support. Comparable to what exists in the general culture of singular emphasis versus group identity, belonging to the Jewish community does not have the same magnetism as it did.

11. Interpreting our on-going commitment to Israel is a major challenge, particularly to the young.

As time goes on, i know that i will think of more. I look forward to your reaction and thoughts on scenario writing.

Best regards,

Howard

**From:** "Hochstein Annette" <annette@vms.huji.ac.il>  
**To:** <mfna@egroups.com>  
**Date:** 2/14/00 1:33AM  
**Subject:** [mfna] Re: Beginning our Conversation

Hello to all from the holy city - in light of our latest conversations and last week's work, I believe Marom's three points acquire new relevance. Hence the re-circulation for consideration and perhaps for inclusion in the chart of 10 and its criteria.

Rain in Jerusalem,

Love to all,

annette

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

From: Danny Marom <marom@vms.huji.ac.il>  
To: mfna@egroups.com <mfna@egroups.com>  
Date: 26 January 2000 07:51  
Subject: [mfna] Re: Beginning our Conversation

>Though I won't be there in the flesh with you, I am of course in spirit.

>Just a thought or two about your query, Annette's responses, etc.:

>

>1. The overall goal I think should be to improve Jewish education and the

>means for that is the training of educational leaders. I fear that we turn

>the latter into the goal and detach the notion of training educational

>leaders from the context of change efforts. In considering clients for

>early projects, we need to locate contexts for change efforts which we

>believe have good reason to succeed, especially with our support.

>

>2. The above point relates to Annette's "impact" and "ease of doing"

>criteria as well. We probably need to work small and with a good chance of

>success at the beginning. Rather than "Rabbis," perhaps we need to think

>of

>training the leadership of one of the Rabbinical training programs (as you

>and I, Danny Gordis, once thought). Rather than training a whole group of

>general education principals, perhaps we work with three and their

>trustees/staffs as they take on Jewish schools (or consider working with

>three JCC Jewish educators and their trustees/staffs). These kind of

>programs then become models for larger scale programs later on.

>

>3. The Reform movement might want to continue exploring its vision in light

>of the discourse which has emerged around the publication of Michael Meyer's

>paper. This is a topic for my conversation with Sara Lee, whom I hope to see in March. Perhaps there is room to think together about this?

>

>Good luck, DM

>

>-----Original Message-----

>From: Hochstein Annette <annette@vms.huji.ac.il>

>To: mfna@egroups.com <mfna@egroups.com>

>Date: ΕΑΪ ØÁΕÒÉ, ΕΔΑÀØ 26, 2000 11:17  
>Subject: [mfna] Re: Beginning our Conversation  
>  
>  
>>Dear Daniel,  
>>  
>>thanks very much for launching this,  
>>Two quick thoughts:  
>>a. all the suggestions strike me as good and as very feasible  
>>b.can we choose wisely without having at least a first  
>>e-mail iteration of the two larger questions:  
>>\* what are we trying to accomplish (overall) - and hence are there  
>positions  
>>or populations more likely than others to get us to our goals  
>>\* can we articulate a couple of criteria that could help choose in  
>addition  
>>to the solid ones of "impact" and "ease of doing"?  
>>  
>>to be continued,  
>>  
>>annette  
>>  
>>  
>>-----Original Message-----  
>>From: Daniel Gordis <gordis@mandelschool.org.il>  
>>To: mfna@eGroups.com <mfna@eGroups.com>  
>>Date: 26 January 2000 04:01  
>>Subject: [mfna] Beginning our Conversation  
>>  
>>  
>>>Hello MSNA e-group members:  
>>>  
>>>First of all, my thanks again to Orit for her help in setting up this  
>>>group. I hope that it will make all of us productive and enable us to  
>>>share ideas more easily.  
>>>  
>>>As you know, we are all going to be getting together in Cleveland about  
>>>a week from now. Part of what we hope to accomplish, in addition to  
>>>the Steering Committee meetings themselves, is to further our thinking  
>>>on the work that we'll collectively do in North America.  
>>>  
>>>I thought that it might be useful to jumpstart our conversation a bit  
>>>by asking us all to begin thinking already about target populations for  
>>>one or more block programs. My assumption is -- and again, it's only  
>>>an assumption -- that we're going to opt for at least one block program  
>>>as a way of getting our North American ventures going. If that's the  
>>>case, ought we think through one or more target populations before we  
>>>actually meet?  
>>>  
>>>The possibilities are numerous, but as a way of getting our discussion  
>>>off the ground, what would you all think of any of the following as  
>>>choices:  
>>>  
>>>\*\* Jewish principals of non-Jewish schools -- the creme de la creme  
>>>high schools and prep schools, a group of which are run by Jews whom  
>>>Josh Elkin thinks we could recruit to our work

>>>

>>>\*\* Jewish principals currently serving Jewish schools -- doing a  
>>>version of Goals Seminar and a mini-JF over the year or two with them  
>>>to upgrade their level of philosophic rigor and abstraction

>>>

>>>\*\* Rabbis -- like it or not, shuls are still the major educational  
>>>institutions in NA, but most rabbis couldn't begin to articulate an  
>>>educational vision for their institution? Take 15 of the best and  
>>>begin to upgrade them?

>>>

>>>\*\* City teams, as outlined before . . . then which city? Size?  
>>>Compositon of the team?

>>>

>>>Just some thoughts. If anyway responds with reactions, and we get a  
>>>conversation going, I suspect that our work in Cleveland next week will  
>>>move even more rapidly forward.

>>>

>>>My thanks in advance. Stay warm and dry . . . .

>>>

>>>Daniel

>>>

>>>

>>>

>>>-----  
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>>>

>>>-----

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>>>

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>>>

>>>

>>

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>>

>>-- Create a poll/survey for your group!

>>-- <http://www.egroups.com/vote?listname=mfna&m=1>

>>

>>

>

>

>-----

## Template: N. American Initiatives

2/16/00

Nessa Rapoport

Here are some responses to "Template: Take 2" of 2/13/00.

Questions 2 & 3 seem similar. That is, the "strategic importance" will, I think, overlap with the "compelling need" for a specific program. I am also unsure about how Question 4 is distinct from the previous two, in that "anticipated outcomes" will of necessity correspond to "strategic importance."

The kind of questions that come to mind are "umbrella" ones, not so much about individual possibilities as about the relationship among them.

I would be asking:

- Consolidation of initiatives*
1. What grouping of possible initiatives maximizes the whole as significantly greater than the sum of the parts?
  2. What grouping of possible initiatives tells the most transparent story, rather than appearing as "apples and oranges," even if each is technically most feasible of those on the list?
  3. How can we ensure that among those programs we choose we make it possible to recruit "new blood" to the field, in addition to our helping current professionals become more effective? (A JF block program, the PEJE recruitment of Jewish principals of non-Jewish schools and the rabbis program offer that possibility; the others do not. I would want at least one choice that did.)
  4. For those programs that are working with professionals already in the system, what admission criteria would we establish to make it more likely that participants can absorb and deploy our "school of thought"? Your Question 6 asks about the likelihood of recruitment but not about the likelihood of recruiting the kind of people who could most benefit from a "Mandel" approach-reflective, analytical, philosophical, visionary--and articulate. If our familiarity with any one of these possible "client groups" makes us think it unlikely that we can recruit a critical mass among them who would flourish within our culture and "school of thought," that ought to be a deterrent.
- New Blood*
- \**

Hope this is helpful in moving forward.

N.

various options is realistic. Do we have the time to write full sketches of all of these? What order of magnitude do we intend? We didn't arrive at any particular conclusion - the point simply was that we must balance our enthusiasm for thoroughness with a realistic appraisal of the resources and time available to us before the next Steering Committee meeting.

We should remember. We don't have to produce results; rather, we want to produce the results that we believe in.

At present, several people have been flagged as possibilities for writing some of these sketches. Examples include:

Josh Elkin - PEJE →

Daniel Gordis - rabbis and city teams

Howard Charish - communal

Daniel Pekarksy - educational planners (and block program ?)

Some discussion was given to the issue of using present New York Mandel staff to write these sketches. It was pointed out that these people have many talents, yet at the same time, there may be a difference in perspective between the world of the Foundation prior to this current initiative and what we are doing now. It was suggested that assigning personnel to write these sketches keep this consideration clearly in mind.

Howard then raised a question about budget for New York, about Foundation rates for bringing in people as experts, funding for gathering important minds around the table for well structured conversations, etc. It was suggested that it would be highly adviseable for him to review the budget carefully with Annette.

How shall we continue the conversation?

We have another discussion set for two weeks from now, but we should continue to progress even in the interim. When DP finishes the second iteration of the template, we'll review it. DG and HC will remain in touch throughout.

We should also not forget that we need to discuss the Kapelowitz memo when we next talk.

The conversation ajourned at 4:30 p.m.

Dear Fellow MFNA Planners:

Here 's my basic set of notes on possible North American ventures that we discussed when we were all in New York.

The notes were initially taken during the meeting with HC, DP and myself, and then subsequently revised the next day during the conversation with HC, DP, AH and myself. I've revised them again VERY SLIGHTLY once more.

Howard has asked that we all have these available for our conversation today. His proposed agenda for the telecon is as follows:

Agenda

1. Review of the proposed ideas for exploration, with an eye NOT to discussion of each program, but to HC's proposed methodology for moving the process forward.
2. Review of Interview List for next three or so weeks, including: (a) what information should HC seek to elicit from each person on the list, and (b) are there any meetings that we believe HC would be served best by conducting in partnership with someone else? As Howard is the one with the list, I think it would be wise for Howard to distribute via email or fax an updated list of whom he plans to speak with during the next few weeks.
3. Discussion of budget for the New York office (this may or may not require the entire team to be on the phone.

Looking forward to our conversation. My thanks in advance.

DG

**REVISED VERSION BASED ON CONVERSATION**

**WITH CHARISH, GORDIS, HOCHSTEIN, PEKARSKY**

**HOWARD CHARISH LIST BASED ON CLEVELAND**

**DISCUSSIONS AT STEERING COMMITTEE**

1. JF block program
2. PEJE block program - emerging principals
3. PEJE block program - Jewish principals of non-J schools

4. JCCA Jewish education department
5. UJC / communal program
6. TEI Cohort IV
7. PHD fellowships in Jewish education
8. Move professors of J studies in Jewish education
9. Move professors of general education into Jewish education
10. Existence proof of Cleveland
11. JF North American network

**SAME TOPICS GROUPED BY TOPIC**

**WITH ONE OR TWO ADDED BASED ON PREVIOUS WORK**

**AND FURTHER CONVERSATION**

Programs that would require our full effort

1. JF block program (could point out that this leaves space for the less classically institutional - the artist, the literati, etc.)
2. PEJE emerging principals
3. PEJE Jewish principals of non-Jewish schools
4. JCCA education department
5. UJC / communal program
6. Cleveland existence proof
7. Rabbis as educators
8. Educational planners - Gurvis, Torin types
9. City teams

*DP/Planners*

JCCA

- ① *City/Rabbers - Gordes*
- ② *Jerusalem Fellows*  
*E. Planners*
- ③ *Communal*
- ④ *AEJE 2X*



Nature of our effort would be of different sort

10. Move professors of Jewish studies into Jewish education
11. Move professors of general education into Jewish education

### Already in existence

12. TEI Cohort IV (or do we spin it off to Brandeis or some other academic institution?)

### Efforts that are more supervisory in nature; different sort of enterprise

13. JF North American network (but need to think in light of Foundation's decision to go global on the alumni issue)
14. Ph.D. fellowships in Jewish education (we should think about preparing a broad plan for strategic steps, such as chairs in Jewish education, research)

### Three Ways to Think About our Programs

Should our initial thrust into this world include one of each of them?

1. JF type of all different sorts
2. Group people by profession
3. City Team model

The Mandel Foundation Programs develop personnel for Jewish communal life. Its work is informed by the conviction that at its best, communal leadership - be it the leadership of a school, congregation, camp or Federation - is informed by vision, and has a strong educational dimension.

AH = something is missing here - we want to be aggressively explicit about what is embodied in the notion of continuity. Nessa's brochure, the brochures in Jerusalem, Howards materials for the Scomm.

### **DANIEL PEKARSKY CATEGORIES**

#### **FROM THE CHART**

#### Pekarsky Left Hand Column

Priority of need, potential impact

Field's present capacity to meet need

Mandel capacity to meet need

Would there be a clientele

Is Block Program appropriate to the need?

Pekarsky Top of the Chart

Principals

Rabbis

BJE Directors / Community Education Planners

JCC Directors & Educators; Camp Directors

Professor of Jewish education

OTHER: earlier childhood directors, arts-leaders, etc.

## COMMENTS ACCOMPANYING GRID

The development of this grid was suggested in our Jerusalem meetings. It is more of a schema than anything complete: categories can be added vertically ('Relevant considerations'), or horizontally ('Potential clients'). If it is useful at all, it will be as a guide to our thinking and research about where to focus our block-plan energies.

Below are some comments elaborating the "Considerations" categories. The thought is that these kinds of considerations, if they are thought reasonable, would be addressed to **any** potential clientele for a Block Plan.

**Priority of need, potential impact.** Relative to other possible leadership needs in the field of Jewish education, how critical is *this* particular need, and how will addressing it at this time affect the field? Is satisfying this need perhaps a precondition of effectively addressing other personnel needs? Will the training of other kinds of personnel improve the field significantly if *this particular need* is not addressed?

**Field's present capacity to meet this need.** There are different, if inter-related, questions here: 1) Do other institutions/programs, in the Jewish and/or general world of leadership preparation, currently address this category of need (or are they presently tooling up to address this area of need in the very near-future? 2) Do existing or anticipated efforts promise to approach leadership development in a way that we would consider generally adequate to the needs of Jewish education? 3) If the answer to #2 is negative, is it realistic to think that the Mandel Foundation could contribute to the improvement of these efforts (with the effect of freeing up the Mandel Foundation to undertake leadership development in other areas)? Or, in the absence of a Mandel-program, is the field likely to continue to be inadequately served?

**Mandel Foundation capacity to address this area of need.** Does the expertise of the Mandel Foundation, as embodied in its existing leadership development efforts, its school of thought, and the individuals associated with the Mandel Foundation's leadership development efforts in Israel and North America, lend itself to the development of a high quality program that will address this particular area of need? Are there already, or potentially, a group of individuals (in North America, Israel, and elsewhere) who could serve as faculty/administrators/Advisory Committee for such a program? Could an appropriate curriculum readily be established, possibly guided by existing models within the Mandel world? Would it be appropriate to explore the possibility of video-conferencing arrangements that would allow us to take advantage of colleagues in Jerusalem?

**Would there be a clientele for a program addressing this need?** The fact that we perceive a need out in the field does not entail that there would be an adequate clientele for a block-plan program. How large a (high quality) clientele do we feel we would need in order to start a program? What assumptions are we making about the prior background and experience of the clientele we hope to serve? What bundle of programmatic features and incentives would be likely to attract the clientele we would hope to see in this area of need? How much advance-work would need to be done to generate an appropriate clientele?

**Is a block plan appropriate to meet the need?** By “block plan”, I’m imagining, roughly, a program that 1) meets intensively part of every summer for three summers, 2) brings students together two or so times during the year for intensive study, 3) involves supervised work and tutorials associated with professional activities during the intervening years. We need to ask, with attention to different categories of potential clients, whether such a program is likely to meet the training needs of the group in question in a meaningful way. In making this judgment, what assumptions are we making about the background of the imagined clientele?

**BLOCK PLAN GRID: CONSIDERATIONS/POTENTIAL CLIENTELES**

	Principals	Rabbis	BJE Directors Commun. Ed. Planners	JCC Directors & Educators; Camp Directors	Profs of Jewish education	OTHER, e.g., Early childhood directors; arts- leaders, etc.
Priority of need, potentia l impact						
Field's present cap. to meet need						
Mandel cap. to meet need						
Would there be a clien- tele?						
Is B.P. Appro- priate to need?						

January 28, 2000  
21 Shevat 5760

## BEGINNING THE JOURNEY

There are many ways to begin. Fortunately, the decision was made to start my association with the Mandel Foundation by participating in a goals seminar in Israel, January 3-9. I was given the opportunity to immerse myself in the Foundation's guiding principles and begin to acquire a fundamental understanding of the operative culture. At the outset I want to express my gratitude to my colleagues who were extraordinarily forthcoming in time and devotion to the task.

Seymour, Annette, Daniel Gordis, Daniel Pekarsky, and Daniel Marom set a climate for learning and exchange that allowed me to engage in discussion without any restrictions and were fully available in session and nearly round the clock to pursue issues. This environment allowed me to absorb much more content than I even imagined I could and helped me pack my new "briefcase" with substantive ideas and questions.

Together we explored the following topics and themes with particular emphasis on what characterizes the Mandel approach:

- Leadership
- Vision
- Professional identity
- Use of advisors and scholars
- Continuous discourse
- Constructive critics and criticism
- Methodology of training programs
- Role of research and development
- Program design
- Timeframe for implementation
- Creating a faculty
- Target groups
- Structure and function of Jerusalem Fellows, SEL, and IDP
- Curriculum components

This list is not exhaustive but should give you an indication of the diversity and depth of issues covered. The minutes of the seminar further explicate these topics and are provided in the notebook. Of all these ideas, the concepts of leadership, vision and practice keeps mulling over in my mind, and I look forward to pursuing discussions with you. My own understanding was expanded with a conversation that I had with Mort in Florida last week. Mort outlined the kind of people he saw that could get things done and done right. We also talked about the challenge before us to change our communal system.

A major amount of our time was spent developing a first iteration of a workplan. We worked on a list of individuals that I should see in doing due diligence for program design and input. I shared the list with Mort so there are already changes that may not be reflected in the roster in your notebook. I welcome your suggestions of additions and deletions. We also developed a talk piece as an agreed upon position to describe our initiative launch. I hope that we will have time to review it here so that we all will relay a unified message. Finally, a first iteration of a timeline was created with the projection of a fourteen-month period to launch our first initiative(s).

At this juncture I am not ready to describe what these programs might be. I do know that I want the MF to play a critical role in educating senior professionals in Jewish communal service who will be the leaders of their generation. I want our initiatives to attract individuals who will transform our continental system, be change agents and break new ground in sustaining and enhancing Jewish life. Because these professionals have crossed our threshold, they will have

the capacity to be social entrepreneurs. These leaders if already in the field will be re-energized and inspired to stay the course. If they have the talent and leadership expertise but are now in the general community, they will be attracted to our vision and thereby commit themselves to professionally joining the Jewish community.

There are numerous key issues regarding our initiatives. What I hope to do in the next two months in collaboration with my MF colleagues is to further define the challenge, explore the best ways to respond to the need through our initiatives, and construct models as options for action. Here I invite your advice and guidance to focus my time and help avoid if possible distractions.

I did also want to mention that I have spent a considerable amount of time learning the NY office. I have met with each professional staff member as a team and individually. I have requested a job description and time allotment from all staff including administrative staff. I am analyzing the workflow and beginning the evaluation of programming both to satisfy our mission and to correlate the use of financial and personnel resources.

With regard to expanding my own learning curve, I understand that I am entering a new domain, i.e. Jewish education, and need to familiarize myself with theories, principles and practices. To that end I have developed a “tutorial” with several components. I conferred with Daniel Marom and now have in my possession readings in three categories—vision, general education and Jewish education. On an on-going basis I will communicate with Marom on the articles/extracts to get specific learning and applied MF learning. Furthermore, we have set up a “hevruta” [study

group] among Daniel Pekarsky, Daniel Gordis and me. On a weekly basis we will conduct a three-way conversation. The first text that we are studying is John Dewey's "Experience and Education." I will also be having regular conversations with Daniel Pekarsky.

I begin each day with the recognition that we have an extraordinary opportunity to influence the present and future of Jewish communal life. Knowing that we may turn a possibility to a probability speaks to my aspirations as a professional. I look forward to continuing the discourse with you and indeed creating such a legacy.