



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.

Box
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Strategic Plan. Jewish Educational Leadership (JEWEL) planning.
Meetings, 1997-1998.

For more information on this collection, please see the finding aid on the
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CIJE STAFF RETREAT

I. JEWEL LONG-TERM PILOT FOR SENIOR EDUCATORS

1. Who should the target audience be?
 - A. "Stars"
 - B. Groups of educators from institutions
 - C. Community groups
 - D. Senior leaders by setting
2. Leading Jewishly: How do we develop a JEWEL School of Thought?
3. What is the Program Design of the pilot?

II. JEWEL PLANNING

1. Comments on the template for scans of various domains.
2. Comment on the template for community needs assessment.
3. Who will do the scans?

JEWEL Planning: Template of Questions for Scans

I. Trends in Leadership/Preparation and Development

1. During the past five years, what have been the major trends and perspectives regarding leadership development and preparation in the field of >>>>>?

A. What have been the goals of these programs?

Probe about the conception of leadership. What are they? training for?

B. Have there been any major shifts or changes in the field?

C. What have been the overarching paradigms/schools? thoughts? (WHAT)

2. Today, what are the current perspectives regarding leadership development and preparation?

A. What are the goals of the programs? What are they? 'training' for?

B. What are the most prevalent programmatic models and approaches? (HOW)?

C. What is the curriculum and teaching perspectives/methods?

D. Who are the participants of the programs and how are they? recruited?

E. Are there other functions connected to the programs, such as placement?

F. How does the field define "successful"? programs/approaches? What does the field consider as a successful development/preparation program?

II. Future Directions

3. Where do you see the field headed in the future?

III. Best Practices

4. In your opinion, what are three exemplary programs/places in the area of leadership development and preparation for the field of >>>>>?

(Get names, places, approaches, etc).

A. What is unique about them?

B. Why are they considered exemplary?

C. What is the budget for these programs, are they funded through program fees, grants, funders?

5. Who else should I contact and speak with regarding leadership preparation and development for the field of >>>>>?

JEWEL Planning:
Template of questions for:
SCAN OF COMMUNITY NEEDS ASSESSMENT

Need to Probe for both Lay and Professional
Need to Probe for Institutional, Communal, and National Levels
Need to Help Think Beyond Current Positions

CURRENT TRENDS

Collect data about numbers and categories of leadership positions in Jewish education in various settings within communities (geographical) and nationally—lay and professional

What positions in Jewish education have traditionally been hard to fill (open for more than a year, or high turnover?) Probe as to why? What means have been taken to rectify this situation.

What are the leadership needs in your community in terms of skills, knowledge and dispositions of leaders? Do these differ by setting, institution, etc?

How would you describe the personnel situation in your institution/community? What would it have looked like five years ago? What new positions have been created/developed in the past five years? (SAME FOR LAY)

What are the "career tracks" for lay and professionals in your institution/community?

Describe the inservice, staff development and leadership training programs and opportunities you know about, take advantage of? Assessment of these?

Have you brought in consultants and outside experts or utilized internal human resources? Which outside programs, conferences, experiences have your staff and lay leaders been involved in? Probe assessment of these.

What would you consider to be exemplary—successful leadership development programs? Probe as to why they are exemplary.

How have you funded training and development in your institution and community? What has been your training budget each year for the past few years? How much have you spent in each of the past five years? Do you anticipate this amount to grow, decrease or remain the same? Have you outside grants or funders for this or is it integral to your operating budget?

FUTURE TRENDS

How can we/will we think about leadership for the Jewish community in the future? What are your predictions for five years from now in terms of community projections for new positions or vacated positions? New institutions, programs?

Describe the inservice, staff development and leadership training programs and opportunities you would like to have available. What are the leadership needs that you perceive are lacking/needed in terms of skills, knowledge and dispositions?

How can leadership development help meet various community goals and needs in the area of Jewish education?

JEWEL

A host of questions regarding JEWEL

Examples:

- What needs should a JEWEL type institution fill?
- Target audiences?
- Funding issues?
- Programmatic models, locations, etc?
- Important fundamental principles?
- Number of participants?
- Role of recruitment and placement?

JEWEL CONSULTATION
December, 1997

Summary Notes

Present: Karen Barth, Gail Dorph, Sarah Feinberg, Ellen Goldring, Nellie Harris, Cippi Harte, Alan Hoffmann, Elie Holzer, Mike Milstein, Judith McLaughlin, Nessa Rapoport, Mike Rosenak

DECEMBER 10, 1997

Overview and Introduction

Ellen Goldring

Ellen began the consultation by asking participants to introduce themselves and then stated the goals for our meeting. Since all of the participants had previous contact with CIJE, she plunged directly into the agenda.

Although we at CIJE have been talking about the creation of JEWEL, CIJE's Jewish Educational Leadership Initiative, for some time, this consultation marks the formal beginning of a planning process. The purpose of this consultation is to discuss some of the major conceptual issues that will help us create the philosophy, frameworks and curriculum.

The consultation is divided into four topics:

- 1) JEWEL Strawman: What could JEWEL 'look like'?
- 2) Jewish Educational Leadership: What does it mean to lead Jewishly?
- 3) Professional Leadership: What do leaders need to know and be able to do?
- 4) Lay Leadership: What do lay leaders need to know and be able to do?

We will end with a brief discussion of next-steps.

Although the consultation is divided into four discrete parts, this in no way implies that we view these as distinct parts in the actual approaches and/or philosophies and concepts of JEWEL. We believe that as a didactic approach, it will be helpful to divide the pieces up for discussion, and our challenge will be to ultimately intertwine them and put them back together.

We have also decided to address these topics today because we have the expertise of our colleagues from out of town whom have been participating in the Harvard Seminar: Mike Rosenak and Mike Milstein. In addition, we have invited Elie Holzer and Judith McLaughlin.

For each session, there will be a presenter and a chair. The presenter will make brief remarks about the topic. The chair will keep us on track during the discussion.

We decided to start the consultation with the practical: What could JEWEL look like? What are possible programs? Is it a single place? etc. In beginning this way, we will have a common idea of what we mean by JEWEL. This will serve as a backdrop to the more conceptual questions.

JEWEL Strawman

Karen Barth (presenter); Ellen Goldring (chair)

Karen produced a JEWEL strawman, a skeletal outline of the “departments” of JEWEL, which was distributed before the meeting. The purpose of this session was to review the document and raise questions for further discussion.

Karen introduced the discussion by reviewing the document and saying a few words about its components.

Early questions and reactions helped clarify the terms of the “departments” and the projects.

- Although the document is written in the present tense, it is really a document about what might exist in the future.
- Clearly each of the elements of the strawman needs to be further described and refined. For example, it was evident that a whole document needs to be written about our educational philosophy.
- JEWEL is not just a leadership institute with departments; it is a school of thought.
- Long term development programs are seen as the gut of this endeavor. This is a mid-career endeavor (is this where we want to be placing ourselves?).

Post Dinner

After our dinner break, the discussion continued. A variety of practical questions were raised:

- Is this the right mix of things to be doing?
- Do these things fit together?
- Are there pieces missing?
- Are there things we should be doing that we are not doing?

Participants expressed different points of view about the nature of the JEWEL enterprise:

- It should be placement driven. Most of programs out there have done little in terms of placement.
- It should engage with the field in a serious way.
- It can be like executive development programs, which have a history of staying in touch with participants without getting into placement issues.
- We can think of at least two models of participants, both lay and professional, and therefore two models of programs – teams of people from communities and institutions and individuals
- Should we be trying to upgrade institutions of higher learning? Ala Danforth model but for Jewish educating institutions?
- Do we want to be working with individuals or organizations?

Discussion about these and similar issues and questions framed our conversation in this opening session.

DECEMBER 11, 1997

Leading Jewishly

Mike Rosenak, Elie Holzer (presenters); Gail Dörph (chair)

Gail introduced this session by framing three broad questions:

- Is there something specifically Jewish about Jewish educational leadership?
- What is our approach to using our traditional texts in the education of Jewish leaders? (Is it a question of: responses to dilemmas? approaches to issues? images that are traditional ala priest, prophet?)

- What kind of Jewish literacy do Jewish leaders need? Is it different for lay leaders and professionals? Is it different for professionals in different settings?

Mike Rosenak

Mike's presentation picked up on the distinction between goals and intentions that he had introduced to participants in the Harvard Leadership Seminar, which immediately preceded the consultation. The education of Jewish leaders should be focused on intention and virtues rather than being goal driven like business models.

He described 3 intentions among Jews today:

- Naturalistic/positivistic approaches which dominate social science, business models
The problems are then framed in Heifetz type language—adaptability vs. technical solutions are sought.
- *Haredi* approach which focuses on connection between leader and follower. Loyalty to a monolithic tradition, leader represents normativeness.
- Cultural/religious mode that takes into account valued goals, where the leader is a model of intention, and changing norms.

He introduced the concepts of language and literature as paradigms for integrating these three different approaches. Language is the basis of the culture, that which is constantly interpreted. It is the way to negotiate culture. Literature is what you do with the language, e.g., midrash is the development and mining of the language; education is the process by which language becomes literature. Leading Jewishly implies helping people learn about the language and the literature (Naturalistic model – doesn't believe in concept of language; *Haredi* model-- there is no conflict because there is no literature; everything said by the *rebbe* is considered normative; most of us fit into third model). Thus, studying texts as an opening to understanding language and literature is a way to begin thinking about JEWEL, what is it.

Elie Holzer

Elie went back to the JEWEL strawman document in order to address the issue of the strands of JEWEL: Jewish study, development of personal vision, leadership and their integration.

- Uses of Jewish texts
 - Judaism says.....
 - Leaders should know certain texts, ideas, concepts. This body of knowledge will enable him/her to grow as intellectual/spiritual leader.
 - This is what Judaism has to say about educational issues: laws of relationship between teacher and student, laws of rebuke, etc.
- Development of personal vision
 - Focus on educated Jew documents and approach; push knowledge and text toward vision (Jewish philosophy is the best tool to do that).
- Leadership tools
 - If we want to think about the leader as cultural change agent, then a person will also need a deep understanding about how the culture functions and what are its problems. The question might be framed: how do I make language and literature function in my community, in my culture? How can I get my board to talk Jewishly?

This approach would also imply systematic reflection over the course of the educational process.

Questions that were raised in response to these two presentations:

- Do these strategies imply “too high a bar?”
- What do you need to know, do, “be” in order to be this kind of a leader?

- Be, Know, Do are all different. How do these three inform each other? Do they need to be present in the same configuration no matter the role?
- We visited the term “leader.” Is this the correct word? What about educator – why is that word not viewed with favor?

Karen synthesized the conversation by creating a list of seven basic qualities that she heard emerge from our conversation:

- Intention to BE – state of mind
- Skills
- Virtue – embodies intention
- Empathy
- Resiliency
- Presence

She asked how tradition could help us define and study what there are.

Suggestions:

We might have different strands of minimum knowledge on both Jewish and leadership sides and then come together for certain kinds of courses and work.

We might generate a list of dilemmas and try to deal with “Jewish” approaches to dealing with them (would include framing of issues and ways to deal with them).

Professional Leadership

Mike Milstein (presenter), Ellen Goldring (chair)

Ellen introduced Mike’s session by informing group that Mike had been asked to share ways of thinking about professional development for leaders.

Mike began by laying out two very different paths reflected in approaches to leadership development. One path is the tradition of the disciplines (the overall task is to teach knowledge which participants will learn to use); the other is more eclectic and borrows from a variety of fields. This second approach begins with the field of practice, and speaks to the issues facing it. The second approach translates from the social sciences to leadership requirements, focusing on helping leaders function better.

Mike pointed to three critical characteristics of today’s leadership:

1. Transformational rather than transactional

Today’s cutting edge leadership programs focus on transformational rather than transactional leadership because such leadership is crucial during times of change. These programs are not devoted to specific tasks, but focus on what it means to be a leader. They develop a capacity for transformational leadership — characterized by Mike as the ability not only to have a vision, but also to help members of the group have ownership of the vision. (It is not that transactional leadership is not critical, it is in fact foundational. It is just not enough at the present time.) He created the following chart do summarize the differences between these forms of leadership.

Transactional Leadership	Transformational Leadership
<ul style="list-style-type: none"> • Involves an economic, political, or psychological exchange between the leader and the follower • Task oriented • Focuses on implementing established programs 	<ul style="list-style-type: none"> • Emphasizes personal relationships where leaders and followers motivate each other toward greater aspirations • Relationships- and process-oriented • Focuses on attaining something new

2. Importance of platforms

Many educators do well with crisis management, but are not in touch with their core beliefs. Leaders, who are in touch with their core beliefs, are ones who are able to make tough decisions. Psychologists say, each person probably has about 6-8 core beliefs. Today's leaders must know who they are and what they believe to be important.

3. Thoughtful reflection.

We need to be preparing leaders who can be reflective and analytical about their work. (Donald Schoen's work on reflecting in action and reflecting on action.) There are people who survive from crisis to crisis; others who are able to deal with reflective action. Organizations that succeed become more complex.

Implication: can't have the superman leader. As things become more complex, you can't have one person/leader who does everything. We need to be thinking about developing leadership capacity in organizations; preparing leaders with an eye toward a variety of leadership roles.

Some of the leadership roles discussed by Mike include:

Leader as facilitator. This is the person who keeps the process going. This is very different than the traditional model.

Leaders as "Empowerer." If leadership can't be based on superman figure as authority, then you need to be able to empower others to do this work, also.

Cultural leader. If we are trying to have cultures (who are the heroes, stories we tell, etc.), then the leaders need to model this. Is this a role that transforms the culture or one that maintains the current culture? How do you change a culture without losing it?

These are not questions or roles that flow easily out of leader as "solver of problems."

At this point Mike talked about the role of standards in creating norms for the field, both in terms of how the tasks of leadership are defined and also what constitutes "knowing and doing" at an adequate level.

The discussion that followed touched on the following issues:

- What are the core things we believe leaders should be able to do?
- What is the content part of the job of creating transactional and transformational leaders?
- How will we go beyond process in the creation of our programs? We believe that we have been so successful so far because of the importance of content in all of our products.
- Is there something about the Jewish content that needs to be shaped differently in order to have a transformational leader of Jewish culture?
- Do we need to create also an entry-level program for "leaders on the way" (i.e. JEWEL "cadets")?
- Who are our actual targets? What about rabbis as educational leaders?

Developing Lay Leadership

Judith Bloch McLaughlin (presenter), Cippi Harte (chair)

Cippi began by framing our question: how do you attract, engage, retain lay leaders over time?

Judith began by characterizing current work with lay leaders as weak. There is ambivalence on the part of professionals in terms of what they actually want from lay leaders. As structured, most board meetings are boring; nothing transformational is happening or is being asked of board members. Board work is structured as transactional rather than as transformational work. As structured, it is not clear if lay people see themselves as leaders in the organizations within which they are volunteering.

Lay leaders get involved in organizations for a variety of reasons. People are willing to give of themselves if they feel valued and can be part of seeing results (have a task to perform that is significant). It is more likely that leaders can be retained if they are involved in significant leadership roles.

There is an association of governing boards of universities that can serve as models of training boards, working on issues such as:

- Where do we team? Where don't we?
- What is the line between lay and professional in decision making and management?

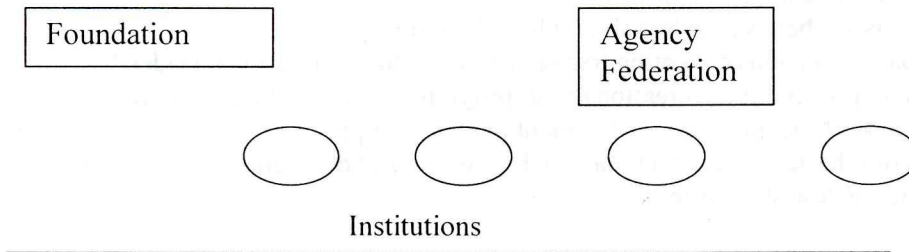
She then began to make a list addressing the question: what should lay leaders know?

- The organization
- Each other
- Organizational priorities
- The industry (of which the board is a part)
- Environment
- Where/how to be involved
- What to contribute
- Culture of the organizations

Clearly, ways of thinking and working with lay leaders need to be part of the curriculum for professional leaders, as well as powerful Jewish ideas.

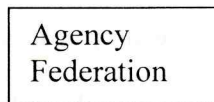
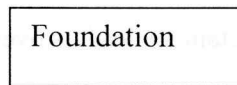
Boards that work well absorb people and give them the requisite experiences and learning necessary to become productive. People choose to be on certain boards for a variety of reasons, reputation of the board and organization, being one of them. Additionally, people do not join organizations because they are broken, but because they can make a difference. Judith reiterated conventional wisdom about board members needing two out of the three W's: wisdom, wit, and wealth.

Karen drew a diagram that tried to capture additional various points that Judith had made in a visual way:

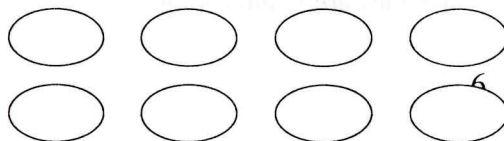


Jewish
community
today

National/city
level



Communal Institutions



Next Steps

Karen Barth

The consultation concluding with Karen summarizing the questions that emerges as key issues to be incorporated for our deliberation in our planning process:

Why Are We Doing This? (vision)

What is our rationale for the project as a whole?
What is our vision of a Jewish educational leader?

Who? (target audiences)

With what kinds of leaders does CIJE want to engage?

What? (curriculum)

What does a leader need to know, be able to do, aspire to be?
What do we believe about how you develop leaders?

How? (structures)

What should JEWEL look like?